



Friends of Casco Bay

Operating Plan for FY09 & FY010

January 1- March 31, 2009 (FY09 short year) and April 1, 2009 – March 31, 2010 (FY010)

December 2008

*Adopted January 2009
for internal use only*

MISSION

Improve and protect the environmental health of Casco Bay

STRATEGIC GOALS FROM THE FIVE-YEAR STRATEGIC PLAN 2008-2012

1. Work programmatically and responsively to ongoing and emerging issues that impact the health of the Bay.
2. Build the organization's perceived value and visibility in the community.
3. Broaden and deepen sources of funding.
4. Build capacity in the Baykeeper program.
5. Maintain and replace capital assets critical to getting the work done, including boats, computers, and water quality monitoring equipment.
6. Continue to invest in the intellectual capital and capacity of the organization.
7. Develop web-based tools that provide information about Bay-related issues, water quality data, and the organization.

The Operating Plan outlined below spans January 1, 2009, through March 31, 2010, incorporating a change in the fiscal year. The format addresses the strategic goals in four sections: Programs, Technology and Capital Assets, Development, and Administration. The content lays out a plan for making progress toward these goals over the next 15 months, while never losing sight of our mission to improve and protect the environmental health of the Bay. We will continue to be as responsive as possible to emerging issues, opportunities, and challenges, both environmental and economic, that may impact the Bay and the organization. The value of what we offer to the community is in continuing our programmatic work, making that work and its implications understandable and relevant to people in our community and our state, encouraging policy changes that make a difference in the health of the Bay, and running our organization responsibly.

I. Programs

a. Water Quality Monitoring

This will be the 17th year of water quality monitoring, thus maintaining one of the most important long term data sets on marine water quality in New England.

- i. The Citizen Stewards Monitoring Program will continue, with 10 sampling dates resulting in 20 sampling events at 30 surface sites around Casco Bay. This will be the 5th summer of nitrogen sampling (dissolved inorganic nitrogen as DIN). Other parameters to be measured, as usual, include: water temperature, salinity, Secchi depth, dissolved oxygen (DO), and pH. We will actively recruit and train new water quality volunteers and retrain returning volunteers. During 2008, 17 new volunteers were trained and 44 returned. We will try to exceed these numbers in 2009-2010, as redundancy of volunteers available for each site makes scheduling simpler when someone has a conflict on a schedule sampling weekend.
- ii. Profile sampling down through the water column at 10 stations around the Bay will continue monthly throughout the year, led by staff using a data sonde aboard the Baykeeper boat. During winter months, only 3 of the 10 sites may be sampled if weather so dictates. Parameters to be measured include temperature, salinity, Secchi depth, dissolved oxygen (DO), chlorophyll fluorescence, pH, and Total Nitrogen. As often as possible, students, other scientists, and volunteers will accompany staff on these trips.
- iii. Nitrogen sampling as a complete suite (TN, DIN, and chlorophyll *a*) by staff from at least 4 sites will once again commence in April and proceed into October. We will be exploring the feasibility of sampling every two weeks at more sites, instead of weekly at just 4. Sites will include: the SMCC dock where we've been sampling DIN weekly since 2001, Knightville Landing near the South Portland Treatment Plant outfall, and the mouth of Anthoine Creek in Pleasantdale Cove in South Portland where the visible effects of nitrogen pollution are evident by the acres of green slime covering the flats. Water samples for TN and DIN analysis will be processed and sent to the appropriate laboratories, while the chlorophyll samples will again be analyzed in-house. Other parameters to be measured, as usual, include: water temperature, salinity, Secchi depth, dissolved oxygen (DO), and pH. This growing dataset continues to be critical to our work with the state on fighting nitrogen pollution in coastal waters.
- iv. Since 2001, we have been sampling water quality parameters, including DIN, from the SMCC dock an average of three times a week year round. We will continue this sampling routine.
- v. Friends of Casco Bay will continue to contribute to efforts to determine the viability of removing or modifying the causeway that impedes tidal flow between the New Meadows Lake and the upper New Meadows estuary. For the 9th year, FOCB will deploy a sonde near the New Meadows Marina for a 2-3 week period during late June-early July when water quality tends to be at its worst. Staff members Mike Doan and Peter Milholland will continue to attend meetings of the New Meadows River Watershed Project to encourage continued focus on opening the causeway to restore circulation and thus improve water quality and habitat.
- vi. We will explore opportunities to collect long term data sets using an unattended sonde at an appropriate location.
- vii. Stormwater sampling will continue and has been integrated into the BayScaping program, below.
- viii. Geographic Information Systems (GIS): During 2008, Mike Doan significantly expanded our GIS capability; we acquired a computer workstation, installed GIS ArcView and JMP statistical software, and Mike began acquiring data layers. Mike will continue collecting layers

of data and developing analytical tools and presentation materials. This effort is key to making our data more accessible, understandable, and meaningful. During FY09/FY010, the production of maps and other visual presentations, displaying FOCB data will become an integral tool in our presentations and in our web-based outreach and education.

One particular focus of this work will be on assessing macroalgal and eelgrass coverage in Casco Bay. This will involve GIS mapping of data layers along with some amount of groundtruthing in the field.

- ix. **Murphy Water Quality Database:** We need a new platform for the water quality database known as Murphy. It was written in DOS in 1994, and needs to be upgraded and re-secured. We believe the relational database program Access can be structured to house the data efficaciously, and to that end, Peter Milholland and Mike will learn how to use Access during the winter of 2009 to assess its viability as the new platform for Murphy. We will meet with professionals proficient in the setup and use of Access. If deemed viable, we will begin the design a new database and migrate the historical data into it.
- x. We will continue to provide water quality data to a variety of agencies, institutions, scientists, and groups.

b. Baykeeping

- a) **Oil spill preparedness:** Casco Baykeeper Joe Payne is serving on Maine's Oil Spill Advisory Committee, an influential platform to affect policies and programs for oil spill preparedness. He will also serve, at the request of the Coast Guard Captain of the Port, on the Maine/New Hampshire Area Committee on Oil Spill Preparedness.
- b) **Dredging:** The federal channel in Portland Harbor will be dredged in 2011-2012. Joe is serving on the Portland Harbor Dredge Committee of the Waterfront Alliance. Friends of Casco Bay has monitored the sediment sample analysis results to be assured that the dredged mud is suitable for disposal at sea. We will continue to press for lobster relocation as a condition of the Dredge Permit. Joe instigated an analysis of a Confined Aquatic Disposal (CAD) site in Portland Harbor for the contaminated sediments at the privately owned piers; a sub-bottom survey, in Nov 2008, confirmed suitable depth to bedrock to accommodate a deep hole in the harbor in which to isolate contaminated sediments. Work on this issue will continue over at least two more years.
- c) **Work with the City of Portland:** Friends of Casco Bay helped influence the DEP and the City of Portland to get serious about eliminating combined sewer overflows CSO's, and helped get a \$61 million dollar bond passed by the City Council for Tier II of the CSO Abatement Program. We encouraged the City to have stakeholder meetings on CSO's. We will continue to attend the quarterly meetings on CSO's to monitor the City's progress on its elimination plan. We will continue to make it clear to the City that not making deadlines will cause a reaction from us, up to and including legal action.
- d) **Nitrogen Initiatives:** A Legislative Resolve passed in 2007 called for the DEP to create a plan for establishing Nitrogen criteria and limits in coastal waters. The DEP's report to the Legislature was postponed a year, and thus so was our opportunity to present our vehement opposition to parts of that report. Meanwhile, we continue to collect and analyze data, consult with experts from around New England, search for sources of other nitrogen data in Maine, and build our case using examples from the literature. We are preparing to address the Legislature's Natural Resources Committee this winter to fight the delays by the DEP, to voice our objections to their plan and their delays, and to encourage the adoption of a standard which has been corroborated by examples in the literature.

- e) Keep an eye and an ear on such activities as:
 - a. Coal tar remediation effort in Portland
 - b. Snow dumping proposals: we are researching snow dumping regulations and practices in other states with an eye to potentially introducing legislation here in Maine.
 - c. Waterfront development projects
 - d. Great Diamond Island proposed development and the inadequacy of its proposed sewage treatment
 - e. Hypodermic needles in the intertidal zone, especially Back Cove: we will continue to work with the City of Portland to identify the sourcing and reduce or eliminate needles in the intertidal zone.
- f) We began building more capacity in the Baykeeper Program in 2008 by dedicating more of Mary Cerullo's time to assist with research, scheduling, and document preparation. She will continue to assist in the monitoring of the CSO Abatement Program in Portland, draft position statements, help culture constructive relationships with policy leaders, interact with Waterkeeper Alliance on national issues and positions, continue to oversee the research on snow dumping and the Great Diamond Island development, and coordinate volunteer assistance with Baykeeper issues.

During 2007 and 2008, working with Board members, we identified a handful of experienced environmental attorneys to whom we might turn for advice and counsel on Baykeeping issues. We have a small database of professionals for whom we could seek advice or referral should they be conflicted out of being able to advise us. We will continue to expand this database and to explore ways to gain access to legal counsel or build legal capacity in the organization in the future.

- g) Attendance at meetings and conferences as diverse as the Waterfront Alliance (Portland) and the Waterkeeper Alliance (international) continue to be important to bringing our work to our peers and community while learning about what else is going on. All staff members attend meetings to increase our visibility, learn new things, make new partners, support current partners, collaborate on problem solving, and insinuate our agenda into other groups' activities. We will weigh, with board and staff leadership, the import and impact of other emerging issues, and craft our response.

c. BayScaping and Stormwater Sampling Program

For funding purposes, during 2008, we more formally wedded our stormwater sampling program to our BayScaping program. As we collect stormwater data and obtain the lab results, we are able to map that information with GIS onto maps of Casco Bay and specific neighborhoods, increasing the power of the information. Presenting this data in BayScaping workshops is highly motivating, when property owners can see that pesticides and fertilizers are detectable in neighborhood stormwater runoff.

Stormwater sampling: The Town of Cumberland has limited funds for the third year for a limited round of stormwater sampling analysis. The Maine Board of Pesticides Control (MBPC) may again be a partner in this effort, depending on their funding situation. In 2008, FOCB and a representative from the town sampled at two sites, one exemplifying suburban runoff, and the other, highway and construction runoff. In 2009, Mike Doan will work with the town to identify appropriate sites for sampling.

BayScaping: Mary Cerullo will continue to oversee the BayScaping part of this program. We will deliver a minimum of 8 neighborhood socials, and we will distribute a minimum of 150 packets of BayScaping materials through presentations, mail and exhibits. Mary will audit relevant training classes of the 2009 Cumberland County Master Gardening training program. She will continue to work with the Maine Board of Pesticides Control and the Maine Landscape & Nursery Association to establish standards for Yardscaping training and certification for greening the lawn care industry.

d. Pumpout Program

- i. Given the No Discharge Area of Casco Bay and the slow attention given to pumpout compliance by the Maine Dept. of Environmental Protection, the Pumpout Program continues to play an essential role in Casco Bay, in terms of direct reduction of sewage discharges into the Bay, the education of boaters through the program's ambassadorial function, and as a liaison between the DEP and those marinas in out-of-service mode.
- ii. We will continue to encourage the DEP to launch a pump service program to help get pumps back up and running in a more timely way.
- iii. The Pumpout Program breaks even because of reimbursements and dedicated funding. The DEP reimburses FOCB for 75% of the costs of running the program, and the City of South Portland (Water Resources Division) and Portland Water District both make contributions to support this program. During 2008, the Board concluded that this program will continue on the condition that it is financially self-sustaining and can be adequately staffed, something which had been an issue in the past.

e. Casco Bay Curriculum

We will continue to work with teachers and educational administrators to disseminate the Casco Bay Curriculum in the community and continue to refine and update the working modules. Mary will continue to formulate plans with SMCC's Applied Marine Biology and Oceanography instructors to develop a workshop for students to work as outreach instructors for K-12 schools, using the Casco Bay Curriculum. Mary will deliver at least 5 more workshops and/or school consultations by the end of the year.

f. Volunteer Relations

We will continue to recruit volunteers, for the water quality monitoring program and for other field work, beach clean ups, office work, and events, using our website, posters, and Constant Contact outreach via email.

For the 10th season, we will coordinate volunteers to assist staff with our voluntary involvement in juvenile lobster monitoring for The Lobster Conservancy, at one site in Cape Elizabeth, monthly, April through November.

We will continue to explore hosting or collaborating on an Oiled Birds Conference again, in which members of the public are trained in how to assist with oiled birds in the event of an oil spill. We will explore opportunities with the Coast Guard to increase other kinds of oil spill preparedness, using volunteers in the community.

g. Events – Community Engagement with Our Work

As a community organization, people seem to look to us to use the idea of protecting the Bay to bring people together. This gives us the opportunity to directly engage with people who care about the Bay and our work. Events that focus on specific groups have proven to be the most effective in

delivering tailor-made messaging about our work and recruiting support as a result. The variety of events range from seminar-like presentations, to neighborhood information socials, house parties and BayScaping socials for neighborhoods, the annual meeting and volunteer appreciation event for those who work the hardest for and with us, a major donor party for our elite donors in an elite location, and the environmental film festival open to anyone and everyone.

- i. 20th Anniversary Year: At the recommendation of the PR/Development Committee of the Board, we will, over the next 15 months, fold into our communications and events, at every opportunity, the fact that we are celebrating our 20th Anniversary, and that we expect to be here, improving and protecting the health of the Bay for at least another 20. We have decided not to have one event dedicated to this.
- ii. Speaking Engagements: One of Friends of Casco Bay's strengths is making scientific data understandable as a motivator for people to change their habits in ways that will have positive impacts on the health of the Bay. People want to do the right thing. Events give us the opportunity to bring our data and science into the community in a personal and easily understandable form. This builds knowledge about the issues, informs people about what they should and shouldn't do that can protect the health of the Bay, and increases the credibility, visibility, and relevance of the organization.

There is increasing demand for us to make presentations in the community. We will work to expand the schedule for our staff (and affiliates) to speak. Staff and Board are identifying sectors, groups and venues, such as land trusts, yacht clubs, and civic organizations. We will explore, with each opportunity, whether we will be reimbursed for travel, receive an honorarium, solicit for membership, and/or recruit volunteers, though these will by no means be "deal breakers" for engaging. In addition to speaking engagements in which we will talk about water quality, nitrogen pollution, stormwater, Baykeeping, BayScaping, the Casco Bay curriculum, and the organization, we will be making presentations at our house parties and similar events.

We are acquiring, with dedicated funding, a new laptop which will make more reliable our ability to give multimedia presentations (e.g., a PowerPoint slide show that incorporates audio, moving graphics, and video). As more graphs and mapped information are created, these products will also be integrated into presentations.

We will continue to keep a log of all presentations given along with the number of attendees.

- iii. Conferences: Friends of Casco Bay will be involved in a number of conferences, in a variety of roles, including at least the following:
 - a) Status, Trends, and Conservation of Eelgrass in the Northeastern United States and Canada, Feb. 24-25, 2009, Portland, Maine, bringing together scientists and managers of this important resource, from New England and Canada. Friends of Casco Bay is acting as the fiscal agent of the conference and in return, is being given sponsorship billing.
 - b) New England Estuarine Research Society, April 2-4, 2009, Salem, Mass. Each year this society hosts two meetings, and Mike tries to attend at least one.
 - c) Waterkeeper Alliance Conference, June 25-28, 2009, New York City. Casco Baykeeper Joe Payne is a founding member of the Alliance and serves on the Board. Each year we send a staff colleague with him to the conference, and this year it will be Mike Doan.
 - d) Regional Association for Research in the Gulf of Maine, October 4-9, 2009, in St. Andrew's, New Brunswick. It's been 12 years since the last conference, out of which

came substantial and useful proceedings updating the science findings about the Gulf of Maine.

- e) Maine Coast Water Conference, October 28, 2009, Samoset Resort, Rockport, Maine. Mike Doan is on the steering committee to plan this second state-wide conference and he will be presenting our Nitrogen data.
 - f) We will work with the Casco Bay Estuary Partnership on planning a State of the Bay Conference for 2010.
- iv. House Parties: We will probably host 3 house parties, one in Massachusetts during the winter of 2009, one in Cape Elizabeth in September, and perhaps one either in Falmouth or in the eastern end of the Bay, in July or August.
 - v. Hook and Slice Tournament: This event was postponed from 2008, and is likely to occur during the last weekend in August. We will work with Adam Taylor to provide staff and volunteer assistance, as Friends of Casco Bay has been the charitable beneficiary of this in the past.
 - vi. Sponsored events: Sponsored events have brought a tremendous return, from leveraging board relationships with corporate and media sponsors that we otherwise could not access, to providing visibility with the general public while raising much needed revenue while promoting our core message and mission.

On October 3, 2009, we plan to host, for the 2nd time, the Wild & Scenic Environmental Film Festival at USM's Abromson Center. We will work with the Board to secure media sponsors up front. Then, using the data from 2008, along with the media plan, we will put together a simple package that conveys the exposure value of sponsorships. We will change the pricing structure to include lower entry points, toward the goal of garnering more sponsors.

We will also explore sponsorships and in-kind donations for our other events.

- vii. Annual Meeting and Volunteer Appreciation Event: We will host this event in early November, after the Maine Coast Water Conference at which Mike Doan will be making a presentation that we will have him give to this Event. This event gives us the opportunity to thank those who roll up their sleeves and work alongside us all year, including our Board, our water quality monitors, other volunteers, and our community partners. Cole Haan headquarters worked well geographically and as a venue, and we will explore its availability to us again this year.
- viii. Major Donor Event: The December 2008 event at the Cumberland Club was so successful that we will repeat this event in December 2009.

h. Media and Public Relations

- i. We will continue to build on the already excellent record we have with getting our message out to various media connections. We will continue to find opportunities for print, web, and television media to run feature stories on aspects of our work, staff, board and volunteers. We will continue issuing press releases on everything newsworthy, from the appointment of new board and staff members, to program initiatives, funding successes, crucial partnerships, and volunteer accomplishments.
- ii. We will keep our website dynamic and refreshed with substantive and easily understandable information about our work and Casco Bay. We will continue to track visitor statistics, make use of links that serve our issues, programs, initiatives, and events. We will develop a more comprehensive plan for using this such tools as Constant Contact and our group Facebook page

to their fuller potential, for staying in touch with volunteers, members and others who care about the Bay.

- iii. Print media: we will generate newsletters, the Annual Report, the film festival booklet, in addition to program-related materials. Whenever and wherever possible we will explore the trade-offs between cost and such things as the durability and portability of mailed print media versus the less expensive but more ethereal on line media.

We will endeavor to get a full featured article in one of the monthly glossy magazines (Maine Boats Homes & Harbors, Down East, Port City Life), we'll continue to submit editorials to the local papers, we'll contact marinas to include information about the no discharge area in their newsletters, and we'll work with USM Media Studies students on video media. We will promote our 20th anniversary year and the tag line "What a Difference a Bay Makes."

II. Technology and Capital Assets

- a. Upgrading our water quality database, Murphy, is a priority, as described above at I(a)ii.. We have some dedicated funding to assist with this endeavor, and we will seek more financial support later in the year.
- b. Over the past two years, we have made significant investments in the structure of the Baykeeper vessel in order to keep it safe and working well for the next 3-5 years. During that time frame, we will begin to develop plans for funding a replacement vessel.
- c. We need a storage shed at the office for equipment storage, and we will explore such options and in kind trade of some sort with SMCC for one of the sheds made through their Building and Construction program.
- d. Upgrades in office equipment will continue; we have some dedicated, carry over funding from the Knapp Foundation for this purpose during our short fiscal year FY09.
- e. Thanks to recent grants, our water quality monitoring equipment is in good shape. That being said, we have two water quality related infrastructure wishes. Over the next two years, we will be on the lookout for opportunities to fund acquisition of a data sonde with telemetry, an acoustic Doppler current profiler, and a weather station that can be installed on the SMCC dock. We will also try to catalyze the design and funding of a much-needed circulation study for Casco Bay.

III. Development

2008 marked the first year of full capacity in the development office, with both a Development Director and a full time Assistant on board. Fundraising efforts were robust. The results in 2008, even in a faltering economy, included significant increases in foundation and government funding beyond budget; individual giving reflected the economic contraction, in spite of the well-designed solicitation plan enacted throughout the year. Corporate giving was off, as well. During 2009, we will endeavor to broaden and deepen all sources of funding.

During FY09/FY010, development efforts will include the following:

- a. All solicitations for membership renewals and annual fund appeals will be sent with hand-written notes, as is our standard policy and practice.
- b. The database will continue to be mined for special solicitation opportunities. Special appeals will again be designed as part of the Annual Fund appeal, to tailor asks to interests.

- c. We will develop a better corporate solicitation plan, including improvements in working with the Board to solicit sponsorships for events.
- d. We will continue working with Block Island Maritime Funding on our boat donation program.
- e. We will continue deepening our expertise in using our development software system.
- f. We will redesign our plan to set up visits with major donors, as well as with corporate and foundation representatives. We will contact the Board, as visits are set up, to garner intelligence and to see if Board members can accompany us to see people they know.
- g. We will lay the groundwork for a planned giving society, including drafting our gift acceptance policy and announcing a planned giving campaign.
- h. We will design and host a variety of events (see section above on events): 2-3 house parties (Massachusetts, Cape Elizabeth, Falmouth, the eastern side of Casco Bay); the environmental film festival October 3, 2009; the annual meeting and volunteer recognition event in November, and another Major Donor party at the Cumberland Club (Dec. 3, 2009, if possible).
- i. We will continue working with individual board members to find the best ways to leverage their social capital and engage them in friend and resource building with us.
- j. We will take advantage of our new fiscal year end in 2010 with a February year-end giving push.

IV. Administration

- a. **Staff:** Over the past 5 plus years, Friends of Casco Bay has carefully restructured its staff, ultimately adding only half of a position, by redefining job descriptions and hiring accordingly when there has been attrition. This has worked out incredibly well, with “the right team” at work together for a full year. In 2008, there was more seamless collaboration among staff than ever in years past, allowing us to take advantage of individual strengths and shared goals for projects. We will continue our program- and project-focused oversight meetings to facilitate this.

The staff consists of 8 full time professionals, a seasonal pumpout ambassador, and for one semester each year, an SMCC intern. Turnover is low and slow, and each and every member of the staff more than pulls his/her weight as evidenced by the amount we are able to accomplish each year. Cost of living increases in the past have been budgeted effective the first of July, based on Social Security Administration rates published the prior October. Our benefits package includes health and dental insurance, life and disability insurance, and a retirement plan. These are investments in the intellectual capital of our organization, and we need to protect this investment and make every effort to maintain levels of compensation and benefits to sustain the staff.

- b. **Fiscal Year End Change:** Our fiscal year end will change, following the close of 2008. We will have a 3-month short year, from January 1, 2009 to March 31, 2009. The books will be closed and a new fiscal year will begin on April 1st and run to March 31, 2010, and will be referred to as FY 010. Form 990 and 5500 will be filed for each year.

The annual report for 2008 will be prepared during winter/spring 2009. The next annual report will be prepared following the close of FY 010, during the spring/summer of 2010.

- c. **Financial Stability:** As of the drafting of this plan, the economy, domestically and internationally, has gone into a recession. As in the past, monthly financial reports will be prepared. Special attention will be paid to budget versus actual figures for any signs of revenue faltering so that assessments can be made and appropriate measures can be taken, if and as necessary. We will

assess the resources we have at our disposal as we move forward each quarter, and we will continue to explore contingency plans, options, tradeoffs, and implications.

- d. All members of the staff are engaged throughout the community and much of the state in a variety of ways, attending a myriad of meetings and conferences. While this gives the organization a great deal of visibility, it also provides our staff the opportunity to hear about what is happening with other organizations and issues. We will continue to share data and resources where appropriate, and to seek opportunities to collaborate on projects and/or funding opportunities. We will be alert to the opportunity to pick up important pieces of work, and whenever possible associated funding streams, that may be abandoned by other groups in these difficult times. We will explore with the Board any merger or merger-like opportunities that may arise.
- e. We will continue to engage Board members around policy issues, program efforts and accomplishments, board governance, and connections to resources, financial and otherwise.