

**Friends of Casco Bay  
Community Engagement Committee  
Minutes  
Monday, November 1, 5-6:00 p.m., via Zoom**

**In attendance**

Board: Seb Milardo (committee chair), Deb Diebiegun, Bud Higgins, Pat Ianni, David Kaufman  
Staff: Sara Biron, Will Everitt, Robby Lewis-Nash, Sarah Lyman

**Welcome** – Seb began the meeting at 5:01 p.m.

**Development Metrics FY21** – *Will Everitt*

Will shared our development and fundraising metrics from FY21. Will noted that we usually review these metrics in the summer, but that this summer we were busy with the Executive Director transition. Will said that we have diverse revenue streams, with funding coming from individual donors, foundations, corporations, and government support. In FY21, we broke a record for individual donors where approximately 200 additional households gave than the previous year, for a total of 1,533 households. Once individual donors make a gift they tend to continue to give in subsequent years, so this growth in our individual donor base is great news. Will noted that a major factor behind this growth was our capital campaign for the Climate Change and Casco Bay Fund. Our overall renewal rate for individual donors was 76%, which is a stellar renewal rate for a nonprofit (55-65% is a good benchmark). Will shared that foundation funding is less consistent than individual donor support. There are many reasons for this. For example, some foundations only give to new organizations and some will not give two years in a row. Will said that the number of corporate donors increased in FY21 because many local businesses gave to our capital campaign. However, overall corporate revenue dropped, partially due to our lack of film festival sponsorships, which we did not host due to the pandemic. Will noted that many corporate donors did not donate or reduced the size of their donation due to financial strain from the pandemic.

David asked how many mailers we send every year soliciting donations from individual donors. Will replied that the number of envelopes varies because our membership cycle is complicated, but that the total number of mailers is close to 10,000. The number of mailers can fluctuate year to year. For example, in FY21 we sent 7,500 packets about the Climate Change and Casco Bay Fund to individual donors; a substantial mailing that does not occur every year. David replied that our development metrics look great, and that based on his background in broadcasting he thinks there is great potential to reach more people in the watershed by working with the media, an opinion he has held ever since he joined the board.

Will returned to his review of our corporate development metrics, sharing that after 2008 there was a broad shift in corporate giving culture. Many corporate donors began to hold a quid pro quo expectation where a gift would be reciprocated with some kind of endorsement or promotion. At *Friends*, we agreed we would avoid those kinds of donations.

Bud said he agrees with David's comments that our development metrics look great, while adding that we have to be more open moving forward. We should consider support from corporations that are in line with our mission. Seb suggested that we should solicit donations from Portland businesses with waterfront properties, such as WEX, noting that we take care of the view that makes their property so valuable.

Will moved on to review metrics from the Annual Fund. Will said we send out appeals to targeted to different audiences every year (usually about six appeals or different letters) instead of focusing on only one annual appeal as many organizations do. Our special appeals focus on a specific issue, where an individual's donation will go towards our Baykeeping program, or something else specific (as opposed to supporting our general operating fund). Again, Will noted our FY21 Annual Fund & Special Appeal metrics were high due to our capital campaign, where our fall special appeal focused on supporting the Climate Change and Casco Bay Fund.

Will reviewed individual donor metrics organized by where donors live, according to their preferred address. Portland has the highest number of donors, while Falmouth has the highest number of donors per capita. Will noted that historically, substantial increases in the number of individuals giving from a specific town correlate with us hosting a house party there. Will thought it was a good sign that individual donors increased in FY21 despite the fact that we did not host any house parties.

Seb said that our budget is expected to increase in coming years. Seb asked Will how he thinks we will continue to grow our donor base to match our increasing budget. Will explained that our expense budget is expected to increase because we will eventually move our offices (and our current rent at SMCC is substantially below the market rate), we will hire a new Executive Director, we may hire a new staff person to help with science or Baykeeping work, and the cost of living increased this past year. Will thinks that the funding to match these budget increases will come from growing our individual donor base. One way we can achieve that is by holding onto the donors who gave to the capital campaign.

David commented on our individual donor metrics organized by town, noting that there is great potential in getting inland people to donate to us. Will agreed, noting that as our work expands so should our donor base.

Bud said he agreed with everything that has been said, and that he thinks we need to be less risk averse to meeting in public. We are so good at cultivating support when we connect with people in person. Will replied that he and Sandy have talked about this. Will said that we likely have some donors who will never come out to a future large public event (regardless of the changes in the pandemic) and that some like being more private. Will agreed with Bud, and wants to find more ways that we can meet with people in person, while also offering ways to participate remotely. Sarah commented that we saw energized responses from the people we met with in person this year. She hears from many volunteers that it is helpful when there are multiple ways for them to participate (in person, or remotely).

### **Casco Bay Matters Debrief**

Pat said she liked the concept of going out on the boat with Mike and Ivy. Bud said he was enthralled by Mike and Ivy's synergy and that the events are stellar, though he wished the video had gone more smoothly. Seb thought the event was great and that we always bring high production quality. Seb shared that it could be a good idea for us to host a series of events. For example, we could invite outside experts like fishermen or marine resources personnel to a panel discussion where we compare their observations of the Bay with our own data and analysis. Seb also noted that someone at the event asked about how we are dealing with pollution in the Bay. He thinks that we should host more Casco Bay Matters events where Ivy explains all that she does to address pollution. Bud and Pat agreed with Seb. Pat commented that there is great potential in working with other groups who collect marine related data to show how we are working to address pollution and what we are learning (such as comparing nitrogen data with the locations of failed coastal septic systems). Pat said that after we hired Ivy our style of Baykeeping shifted more toward policy work. Pat thinks we could do a better job of helping people understand what Ivy does. Will was grateful for all of these ideas and shared that staff have had very similar conversations about future Casco Bay Matters events. Bud supported all of these ideas, and thinks that we should host our Casco Bay Matters events in person.

Seb adjourned the meeting at 6:03 p.m.