

Port San Luis Harbor District

Avila Beach, California



Avila Pier Feasibility Study

February 2017



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February 28, 2017

Mary Matakovich, Commission President
Jim Blecha, Commissioner
Andrea Lueker, Harbor Manager
Port San Luis Harbor District
3950 Avila Beach Drive
Avila Beach, California 93434

Dear Mary, Jim, and Andrea:

We are pleased to submit the enclosed full report of the Avila Pier Feasibility Study conducted for the Port San Luis Harbor District. The primary objective of this study was to determine the District's ability to assemble a \$17 million funding package to renovate and reopen the Avila Pier and to assess the level of philanthropic interest within the Avila Beach community.

Studies of this kind seldom identify "easy" solutions to an organization's financial needs. However, they do significantly measure the attitudes and opinions held by people whose support can be vital to the success of any fundraising appeal.

In the case of the Port San Luis Harbor District, the NETZEL GRIGSBY ASSOCIATES team was well received by those selected for personal interviews, whose input was candid, thoughtful and constructive. As a result, we trust that both the Commission and staff will appreciate the viability of our observations, conclusions, and recommendations and will find this report helpful as you chart the District's future course.

On behalf of NETZEL GRIGSBY ASSOCIATES, I wish to express our gratitude to you and the individuals whose opinions and suggestions form the basis of this report. Through their cooperation, this report has been assembled and is now presented to you for your consideration.

Sincerely,

A handwritten signature in blue ink that reads 'R Merrell'.

Rebecca J. Merrell, CFRE
Executive Vice President and Regional Director

cc: W. Jay Grigsby
Stephen D. Willmont
Kathryn P. Jacobs
Cody J. Grigsby

It is imperative that this report be recognized as an internal planning document. Intrinsic to its value is its candor, which is absolutely essential in assisting the Commission, staff and volunteers to capitalize on organizational strengths and address challenges. Although this report identifies the steps necessary to present the project in the strongest possible light, it is not itself a presentation of the case. Therefore, it should not be regarded as a promotional document designed for a general audience. Rather, it should be used as an important resource among key decision makers of the Port San Luis Harbor District, where any less-than-positive statements will be accepted not as criticism, but as opportunities to strengthen the Port San Luis Harbor District for the betterment of the residents of the Special District.

Port San Luis Harbor District

AVILA PIER FEASIBILITY STUDY

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Acknowledgements

We wish to express our sincere appreciation to the Study Advisory Committee (SAC) members for their support of the feasibility study:

| | |
|--|--|
| Jim Blecha, <i>Co-Chair</i> | Sandy and Val Gillespie |
| Mary Matakovich, <i>Co-Chair</i> | Andrea Lueker, <i>Harbor Manager</i> |
| Karla Bittner | Lisa Newton |
| April Brannum, <i>Administrative Secretary</i> | Bob Pusanik |
| Loch Dreizler, <i>Facilities Manager</i> | Mike Ritter |
| Brittany Garcia, <i>Account Manager,</i> <i>Matchfire</i> | Darrel and Linda Rundstrom |
| | Kristen Stout, <i>Business Manager</i> |

Special thanks to April Brannum, Administrative Secretary, for her assistance in securing and scheduling interviews.

Finally we gratefully acknowledge the forty interviewees who participated in the study for giving freely of their time and viewpoints. They graciously made themselves available to us and discussed the proposed project in a helpful and constructive manner. The study would not have been possible without their time and valuable input.

NETZEL GRIGSBY ASSOCIATES, INC. is privileged to serve the Port San Luis Harbor District. We are confident that these findings and recommendations will be valuable moving forward.

Port San Luis Harbor District

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Section I: Introduction

NETZEL GRIGSBY ASSOCIATES, INC., under contract with Port San Luis Harbor District (District) conducted a feasibility study from November 2016 through February 2017. The study was designed to assess community interest in rehabilitating the Avila Pier (Pier) and to evaluate the feasibility of the District's proposed \$17 million funding package to generate the resources required to reopen the Pier for public access and recreation.

Study Objectives

The study had three primary objectives:

1. Assess available resources for the Avila Pier rehabilitation and the District's organizational capacity to assemble an appropriate and effective blend of funding sources, including a successful fundraising campaign, through the evaluation of:
 - The image of the District.
 - Perceptions of the District's effectiveness in fulfilling its mission.
 - Organizational strengths and weaknesses.
 - Current volunteer and staff capacity.
 - Existing and recent development programs.
2. Determine the most likely funding blend and a realistic fundraising goal for the proposed project through the assessment of:
 - The strength of the case for the proposed project.
 - Potential major contributors to the project.
 - The quality and level of potential leadership for an effective fundraising effort.
3. Recommend a plan of action and timeline for:
 - Assembling an appropriate blend of funding sources and launching a fundraising campaign of the shortest duration feasible to ensure maximum results.
 - Identifying and implementing steps to enhance development and organizational capacity to attract greater funding in the future.

Study Process

1. NETZEL GRIGSBY ASSOCIATES worked with District staff and the Avila Pier Rehabilitation Committee of the Port San Luis Harbor Commission (Commission) to develop a project budget and a case statement articulating the need for the rehabilitation of the Avila Pier. The case was shared with interviewees prior to their interview and was discussed during the interview to ensure that interviewees understood the District's proposed plans.

2. NETZEL GRIGSBY ASSOCIATES conducted an assessment of the District's current financial plan and development capacity. The assessment reviewed the District's budget, including a consolidated financial schedule for 2016/17 and revenues; the current chart of organization; and staffing and development resources, including the District's limited philanthropic history. As part of the assessment, advice was sought from Deb Foughty, Executive Director of the Point San Luis Lighthouse Keepers, representing a nonprofit organization with a current Memorandum of Understanding with the Port San Luis Harbor District.
3. A 15-member Study Advisory Committee (SAC), including community volunteers, District staff members, one representative from Matchfire, and two Commissioners worked with professional counsel to compile an initial list of prospective interviewees. To ensure key community views were represented, NETZEL GRIGSBY ASSOCIATES specified that interviewees be hand-selected from among the influential and affluent individuals who have a likely interest in the Avila Pier. The objective was to reach people who might be able to assist the District in establishing a viable funding package for the Pier through a financial or leadership commitment, or both.

Using the criteria of perceived capacity, interest, and access, SAC members identified 57 priority interview candidates. With a goal of conducting 30 to 35 interviews, NETZEL GRIGSBY ASSOCIATES conducted 35 interviews with 40 individuals over a period of seven weeks.

- The interviewees are affiliated with the District accordingly (some are counted in more than one category):
 - 1 staff member
 - 4 current or past Commissioners
 - 11 SAC members
 - 11 individuals of significant influence and/or affluence
 - 17 well-connected community leaders
 - The interviewees also represent multiple community stakeholder affiliations:
 - 2 real estate/development
 - 2 fishing
 - 3 downtown business
 - 5 yacht club
 - 6 tourism
 - Thirty-three percent (33%) of the interviewees are a group considered by the study team to be closely affiliated with the Harbor District. The remaining interviewees are more distant from the Harbor District, so they offer a different perspective.
4. Interview sessions lasted from 45 minutes to 75 minutes, averaging one hour. One interview was conducted by phone; all others were held in person. The interviews were based on a discussion guide used to initiate dialogue and record responses. Each interviewee was shown the following documents during the course of the interview:
 - Case for Support and Estimated Project Requirements
 - List of Port San Luis Harbor District Commissioners
 - List of Study Advisory Committee members

- Port San Luis Harbor District Service Area Map
- Schedule of Gifts to Achieve \$17,000,000 Goal

The study team of Rebecca J. Merrell, CFRE, executive vice president and regional director; Stephen D. Willmont, vice president; Kathryn P. Jacobs, MPA, vice president; and Cody J. Grigsby, senior associate, is confident that this report and its recommendations will be valuable to the District in addressing the needed renovation of the Avila Pier.

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Section II: Findings & Conclusions

Organizational Capacity

An important objective of this study is to evaluate key indicators of the District's readiness and capacity to assemble a realistic funding package, which includes a successful fundraising effort. Success factors include:

- ▶ *A positive image among those who are closest to the District and beyond.* Perceptions of organizational strength and weakness, whether real or not, influence the willingness of prospective volunteers and donors to engage with the Avila Pier project. The degree to which the mission is viewed as compelling is also important in this regard.
- ▶ *Strong leadership among key staff and volunteers.* Successful community engagement and fundraising requires leaders with the commitment and ability to assist the District in moving forward. Potential for success increases if leadership is well known and highly respected, with the ability to recruit other influential individuals to participate.

The following are the findings and conclusions underlying NETZEL GRIGSBY ASSOCIATES' assessment of the District's organizational capacity to successfully attract a funding package.

1. **FINDING:** *To those closely affiliated, the District is effectively fulfilling its mission of serving the public with an array of commercial and recreational boating, fishing, and coastal-related opportunities, while ensuring an environmentally responsible, safe, well-managed, and financially sustainable harbor that preserves our marine heritage and character. Among members of the broader community and those not closely affiliated, there is a perception that District responsiveness is low and constituency groups are not equally represented. Mission effectiveness and image quality among constituency groups outside those closely affiliated are considered to be low.*

CONCLUSION: *The District should increase its efforts to represent all constituency groups, including recreational and commercial interests, and people who live in Avila Beach, and continue to raise awareness and improve its image through acknowledgment of community-wide concerns and address identified priorities with proactive, coordinated, and well-communicated solutions.*

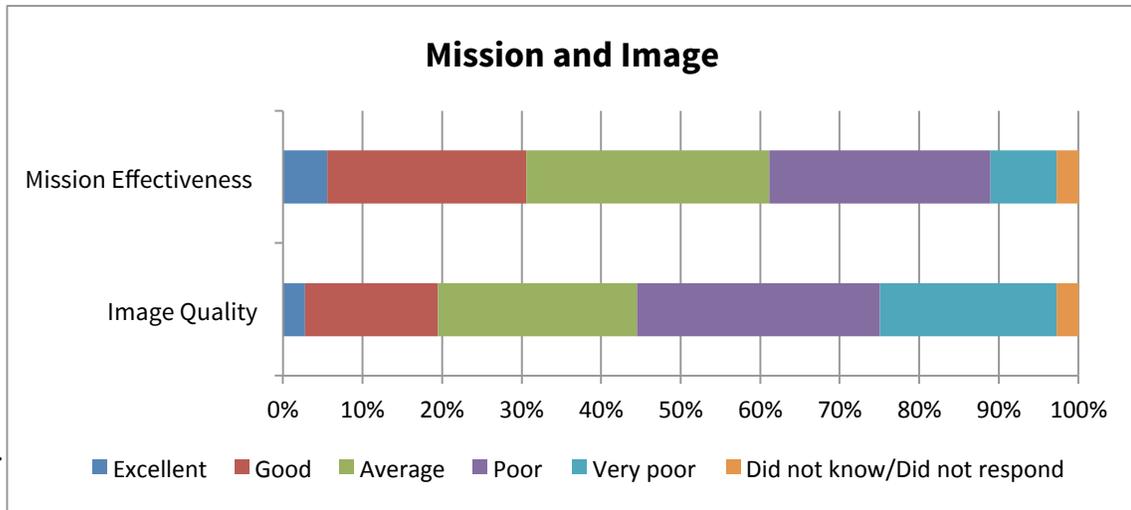
An equal number of respondents consider the District's effectiveness to be high (32%), average (32%), and low (34%). While overall perceptions of mission effectiveness appear to be evenly distributed, interviewees who are closely affiliated rated mission effectiveness higher (58% of the interviewees within the closely affiliated group consider mission effectiveness as "good" or "excellent") than those less closely affiliated, who consistently offered lower ratings (52% of the interviewees less closely affiliated rated mission effectiveness as "poor" or "very poor").

The District's image and visibility is considered low by 54 percent of total interviewees. For respondents who are closely affiliated, image was rated higher (33% of the interviewees within the closely affiliated group rated image quality as "good" or "excellent") when compared to that of their counterparts, who assigned considerably lower ratings to the District's image (69% of interviewees less closely affiliated rated image and visibility as "poor" or "very poor").

The District is praised for providing and maintaining high quality, clean public facilities and resources. The beaches and public facilities are well kept and respondents acknowledge a good balance between recreational and commercial interests. Lifeguard services, Harbor Patrol, and District staff, including the Harbor Manager, were also mentioned multiple times as strengths.

Representative Comments:

- “They are seen as ‘retired fishermen’ with a single focus on fishing and boating.”*
- “The Pier closing has definitely affected the District’s image.”*
- “The District does a great job maintaining and managing public facilities.”*
- “Most people don’t know what the District does and their services are taken for granted.”*
- “The staff and harbor management are great!”*



Interviewees identified financial planning, community engagement, and responsiveness as areas for improvement. Respondents’ perception is that there is a history of weak financial management and a lack of transparency regarding District resources. Twenty-six percent (26%) of interviewees discussed fiscal responsibility as a weakness and/or gave examples of past use of funds as an area of concern. This perceived lack of transparency has negatively impacted stakeholder confidence in the District’s ability to actualize goals, which include ensuring a well-managed, financially sustainable harbor. (It should be noted that some interviewees retained these perceptions for incidents in the past.) Interviewees cited the following examples of their perceptions of weak fiscal management:

- A perception that parking fees were to be designated for Avila Pier maintenance, and that the fees were not used for this purpose.
- Perceptions concerning beach-cleaning equipment that was donated or purchased with community foundation support, which did not suit the needs of the District. It was therefore ultimately retired, appearing wasteful and unappreciated.
- An overall sense that the District does not adhere to the designated use of secured funds, leading to a lack of confidence that the District will “do what it says.”

Fourteen percent (14%) of interviewees mentioned that the District does not uniformly represent all community constituency groups. The perceived emphasis of the District is meeting the needs of the commercial fishing industry and recreational boating at the expense of other recreational needs of the entire Avila Beach community.

The Harford Pier is seen as well supported with District resources. Interviewees recognize that the Harford Pier generates income, and is deserving of significant attention. However, the Avila Pier is seen as neglected, with an inadequate investment of resources.

The Avila Pier is not seen as a high priority for the District, and this observed disproportionate allocation of resources has intensified a perceived bias towards commercial and recreational fishing and boating.

Other areas of concern expressed by interviewees are:

- Available fiscal resources are insufficient in relation to the District’s broad mission.
- Urgency of the District’s funding priorities compared to broader community priorities.

Representative Comments:

“I question the District’s stewardship of financial resources.”

“They do not communicate much with the community, other than to note Commission meetings are public.”

“The District has been dominated by special interest groups at the detriment of recreation.”

“They do not address high profile community issues, such as pedestrian paths and parking.”

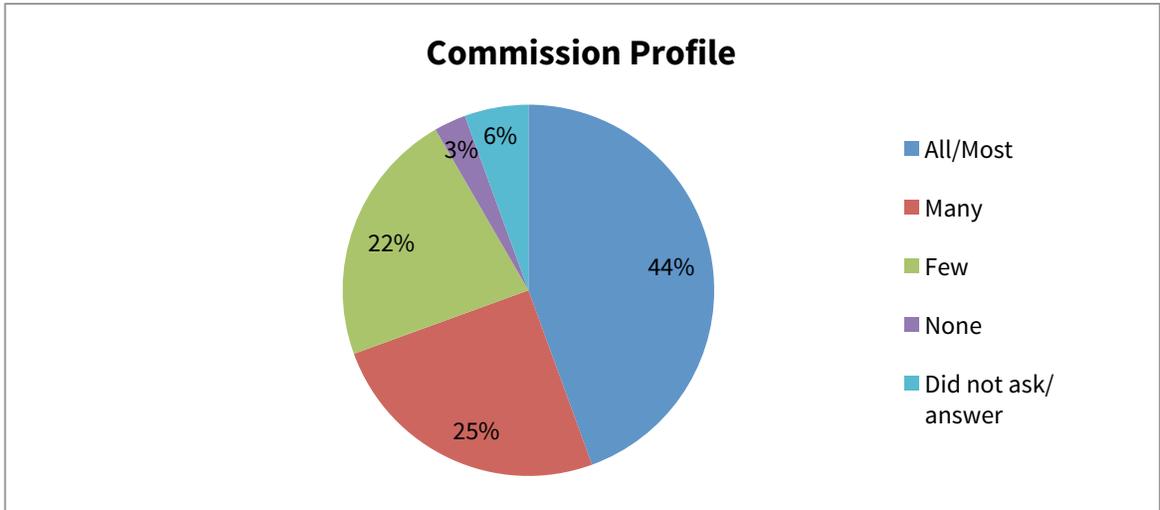
“Their budget is not large enough to actualize their goals.”

“Financial planning and responsibility is an issue. There should have been a maintenance reserve in place for renovating Avila Pier.”

- 2. FINDING:** *There is a perception among constituents that the level of transparency and communication regarding fiscal planning and Harbor resources is inadequate and does not instill confidence in the District and the Commission, as responsible stewards of District resources.*

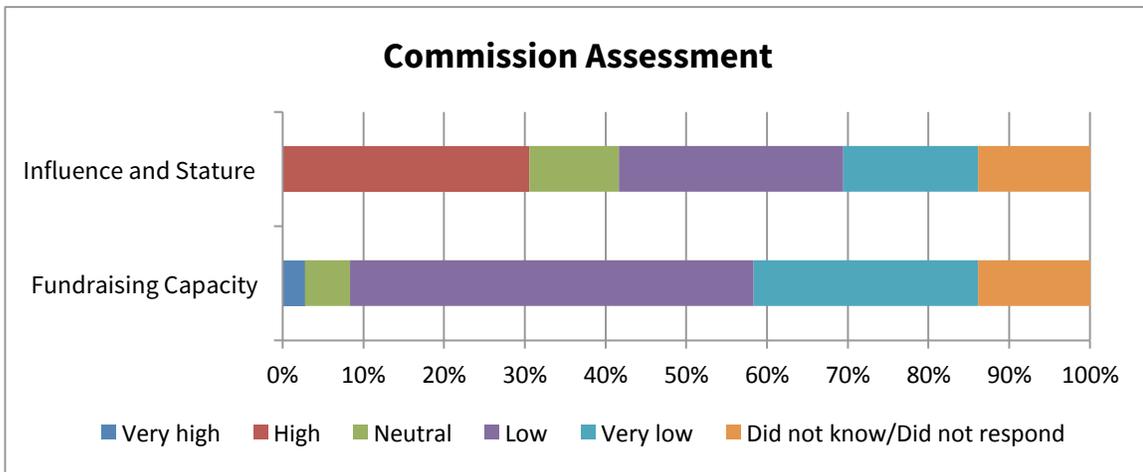
CONCLUSION: *Strengthening communication efforts on behalf of the Commission to remedy transparency concerns should be a primary focus of the District. A fundraising effort will require significant community engagement and an elevated level of confidence in the District. Leadership development in the areas of volunteer engagement and stewardship will aid the District in strengthening valuable stakeholder relationships and will maximize fundraising potential.*

Sixty-nine percent (69%) of interviewees responded that they know “all” or “many” of the District Commissioners. Interviewees were specifically asked to rate the Commission’s level of influence and fundraising capacity.



While select members of the Commission are viewed as being locally influential, overall influence is perceived average to low by 57 percent of interviewees.

The Commission is not considered to be a group who can give and solicit philanthropic gifts at the levels needed for a major fundraising effort. The fundraising capacity of the Commission, in terms of their ability to give and get financial contributions of \$50,000 or more, payable over three to five years, is considered to be low by 78 percent of interviewees. Respondents commented that the fundraising potential of the Commissioners is untested, and they are not elected to fundraise.



During the study process, counsel observed a disconnect between the District and community stakeholders. Some respondents view the District’s governance as removed from public access. An effective communications plan and increased transparency would build stakeholder confidence and trust in the District.

Representative Comments:

“They do not seem very supportive once the voting process is over. It seems like they don’t want to hear from the public.”

“This group is well liked and capable, but fundraising isn’t their strong suit. They could help with grants, but you will need more diverse leadership to get this done.”

“Some Commissioners understand fundraising and could be a great help but it does not appear that the Avila Pier is a priority for them.”

3. **FINDING:** *The District could better capitalize on available opportunities to supplement the gap in funding needs required to fully support mission priorities and engage community leaders who can advance this effort.*

CONCLUSION: *If the District desires to expand alternative funding sources, leadership training and development in the areas of volunteer and donor cultivation and stewardship will be required. Creating strategic community partnerships and strengthening valuable stakeholder relationships will ultimately improve District connectedness and maximize fundraising potential. Improved individual and corporate relationships will strengthen the District’s philanthropic capacity and enhance its ability to effectively fund priorities, including the Avila Pier Rehabilitation Project.*

The District currently has 26 full-time staff, not including seasonal lifeguards. Administrative staff, at this time, includes Harbor Manager Andrea Lueker, Facilities Manager Loch Dreizler, and Business Manager Kristen Stout. Revenues total approximately \$5.5 million in 2016/17, with \$3.2 million generated from property tax assessments in 2016, and \$2.3 million from fees for services, licenses, gas sales, grants, and other sources. Income from grants includes state funds, which have been secured for specific purposes, such as, abandoned boat removal.

Currently the District has no donor processing system. The District does have an administrative staff and has been able to manage the feasibility study within its current staff levels. The District has no development staff and philanthropic outreach has been limited.

Of their total \$5.5 million budget, \$3.3 million is staffing (60%). Notably, \$961,000 (17%) was dedicated to major maintenance/capital projects, including a \$365,000 mobile hoist pier extension (provided by the San Luis Obispo Council on Governments). Unfunded major maintenance projects include the Avila Pier rehabilitation, harbor office, and Harford Pier redevelopment and reroofing. Other expenses include \$774,500 for general and administrative, \$465,100 for utilities, \$243,500 for operations and maintenance, and \$113,100 for supplies.

The Harbor District Commission retained Matchfire, a national marketing and strategy firm, to manage the process of acquiring 501(c)(3) status for the *Friends of Avila Pier*. Bylaws and Articles of Incorporation have been submitted to the State of California and the Internal Revenue Service. The bylaws for the *Friends of Avila Pier* require no less than three board members, and do not specify a maximum.

The founding Board of Directors consists of Harbor Commissioner Mary Matakovich, Harbor Commissioner Jim Blecha, and Richard Hubbard. There was an information reception for community members, which attracted over 30 participants. The Study Advisory Committee grew out of this engagement and further involvement from the reception attendees in the formative steps of creating a new nonprofit organization will increase community advocacy on behalf of the Avila Pier. The prestige of serving as a founding member is attractive and will allow the District to move rapidly to engage these interested parties.

Funding Package

One objective of this study is to determine the most likely funding package to achieve the goal for the proposed project. Important factors in this regard include:

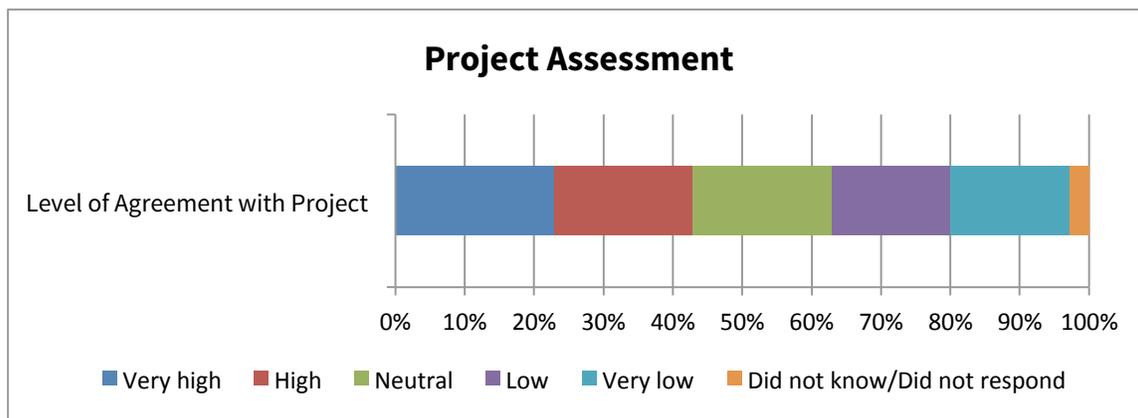
- ▶ *Strength of the case for support.* Funding potential increases when prospective partners and donors understand the need for the Pier renovation and view the project as compelling. The strongest case is one that presents an inspiring vision of what the future holds if the project is completed successfully, and a vision that is perceived to be a high priority by the community.
- ▶ *Pool of potential contributors.* A successful funding package requires a sufficient number of potential donors and investors who will consider supporting the project *at the levels needed* to achieve the goal. Stretch giving among those closest to the project is extremely important because their commitment will set the standard of giving for others.
- ▶ *Pool of potential leadership.* A major fundraising campaign is an extraordinary event in the life of any organization, requiring dedicated volunteer, staff, and elected leadership who will maintain focus and lead the effort to a successful conclusion. Campaign leaders must be highly respected, able to inspire and motivate others, and willing to commit a substantial amount of time to ensure success.

The following are NETZEL GRIGSBY ASSOCIATES’ findings and conclusions regarding the potential for the District’s proposed funding package.

1. **FINDING:** *The proposed project to renovate and reopen the Avila Pier received some support, but willingness among stakeholders to advocate for and fund the project was limited. Confidence in the District’s ability to successfully identify and raise \$17 million is extremely low.*

CONCLUSION: *The District requires an appropriate funding package, which includes available government grant funding, corporate partnerships, and community support to rehabilitate the Avila Pier. A clear and realistic funding strategy will increase the confidence and involvement of potential donors, advocates, and volunteer leaders.*

Forty-three percent (43%) of interviewees have a high level of agreement with the need for the proposed project. The remainder of interviewees were either neutral (20%) or disagreed with the project (34%). A key concern is the scope of the project, including the ambitious funding goal, and a perception that there is no plan to fund future maintenance. Five respondents suggested that the District could lower the cost of the project by reducing the footprint of the Pier. Other interviewees suggested replacing only the pilings that need immediate attention. This might provide the opportunity to reopen the Pier in sections.



The historical significance of the Pier and its place as the *Heart of Avila*, is considered the most compelling aspect of the case. The Pier is valued as a public resource and offers coastal access to tourists and local residents, including the non-boating community. It is recognized that allowing the Pier to further deteriorate and/or removing the Pier will also be costly. Renovating the Pier to a reduced footprint is seen as the appropriate path for the District at this time.

It is clear that the Pier holds historical significance and cultural value to the community. When positioned against other projects in the region however, respondents question whether the Avila Pier Rehabilitation Project is distinct enough to justify the high price tag. Other community needs in the District are perceived to be more or equally as important as the Pier and may be accomplished economically. Most frequently mentioned were parking, pedestrian traffic/safety, and shore-to-mooring transportation.

There are two projects in the central coast region that may have an impact on perceptions surrounding the 1,600 foot Avila Pier Rehabilitation Project and the proposed \$17 million goal:

- The Cayucos Pier, a 982-foot wooden pier, was renovated for a total cost of \$3.5 million. This project was completed in January 2016. A grassroots community effort, *Save Cayucos Pier*, raised approximately \$635,000 from the community. Of this, \$400,000 was directed toward an endowment for future maintenance costs. The Cayucos Pier is under the jurisdiction of the County of San Luis Obispo, which received \$3 million in funds from government and grant sources, including funds from the San Luis Obispo Council of Governments and a \$350,000 grant from the Coastal Conservancy.¹
- The City of Pismo Beach will begin renovation of a portion of its 1,200-foot wooden pier in 2017. The total cost is estimated to be \$8 million. The City will use \$1,000,000 in undesignated general funds for the project, and is planning on financing the remaining amount from bonds and/or a line of credit. Debt service is estimated at \$477,000 annually for 15 – 30 years. The City is planning on raising \$400,000 from various fundraising efforts including naming opportunities for benches, tables, light posts, and trashcans.²

Representative Comments:

“It is hard to believe that our pier is many times more special than other piers in the area.”

“The Pier is nice to have but it is not a necessity, especially when there are other piers available.”

“The Pier is the ‘Heart of Avila;’ it is a part of our history.”

“A shorter more affordable pier is better than no pier at all.”

“Can the District maintain the Pier, or other Harbor assets, into the future? Is a maintenance fund required?”

“The Pier is inextricably tied to the identity of the Avila community. It is where our families and our community gather.”

¹ Based on information provided by Supervisor Adam Hill’s office.

² Based on information from City of Pismo Beach, City Council meeting, Tuesday, January 17, 2017. Agenda item 11.E.

Respondents found the urgency of the project to be relatively low, citing the accessibility of other piers in the area and the amount of time that has passed since the Pier's initial closure. There is a perception that the Avila Pier Rehabilitation Project is not a top priority for the District.

Four interviewees expressed disagreement with the District's decision to close the Pier, commenting that it was unnecessary. Communicating the severity of the Pier's condition and the legitimacy of safety issues may address these concerns.

Representative Comments:

"The longer this goes on, the less urgent it will be."

"How safe is safe enough? Fix the pilings that need immediate attention and open the Pier."

"The Pier should never have been closed. Managing pedestrian traffic at peak times would address the safety concerns."

"There are other community projects that are more important."

Interviewees suggested factors that they believe will help the District secure a funding package in support of the Pier:

- Clearly articulate why the Avila Pier needs renovation, which is in the public's interest.
- Engage visitors and tourists from outside the Avila Beach community.
- Develop a more modest design by shortening the Pier.
- Strengthen relationships between the District and the broader community to raise confidence in the District and the Commission.
- Explore corporate and developer support to fund a portion of the project and identify consistent revenue streams.
- Improve District responsiveness and transparency regarding community issues in an effort to increase confidence in the District's ability to manage and maintain harbor and community resources.
- Center the case for philanthropic support on the historic connection between the Avila Pier and the community.

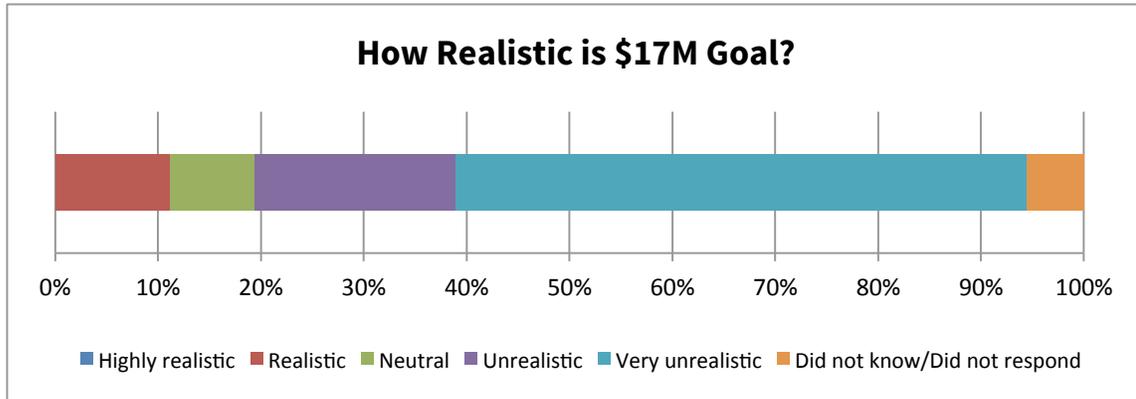
2. **FINDING:** *The study did reveal a strong emotional connection to the Avila Pier exemplified by an enthusiasm among stakeholders to publically endorse the project. Willingness to support the project at the \$17 million level was not identified.*

CONCLUSION: *Considering a comprehensive funding blend at a reduced goal, the study did identify limited major gift potential.*

Eighty-one percent (81%) of interviewees said they would be willing to consider public endorsement of the project. Interviewees were asked if the tested goal of \$17 million is realistic with support from local businesses, corporations, foundations, government grants, and individual philanthropy. Only 11 percent of interviewees regarded the \$17 million goal as realistic, which is extremely low for a study of this kind.

Respondents questioned if the size of goal was proportional to the need for the project and mentioned that a goal this size is large compared to that of other community projects, and more

specifically, other local pier rehabilitation projects. Those who did not find the \$17 million goal to be realistic suggested, on average, a total project goal in the range of \$5.6 million, with approximately \$2.3 million of the total goal to be secured through individual philanthropy, foundations, and local businesses.



According to respondents, potential impediments to this project are:

- Community relationships with the District.
- Small population base.
- Likely low funding interest in the Special District beyond Avila Beach.
- Diminishing sense of urgency due to the Pier being closed for over a year.
- Proposed project goal is much larger than that of other local pier rehabilitation projects.
- Other community funding priorities, which may be perceived as more compelling and urgent.
- Annual revenues of local businesses do not appear to have been impacted during the Pier’s closure.

Representative Comments:

“If the public says no, then that is the ultimate test of the project’s worthiness.”

“There needs to be a plan for future maintenance and reserve funds. People want assurance that if they give, the Pier will be preserved.”

“There is a perception that this is not the Commission’s priority. If they don’t step up, then why should we?”

The majority of interviewees (78%) are willing to consider making a financial contribution to the project, with 64 percent saying they would make a gift and 14 percent saying that they might. This is a high response rate for a study of this kind and is encouraging for future fundraising efforts.

While interviewees were not solicited and these do not represent commitments, respondents offered potential gift ranges up to \$25,000. The largest number of gifts suggested were under \$10,000. Limited major gift potential was identified.

In addition to comments on their own potential giving, interviewees suggested other sources that they believe have the capacity to give in the range of \$50,000 and above. This list will need to be evaluated for capacity, interest, and access. Generally, interviewees suggested:

- Corporate support for gifts of \$500,000 and above is most likely to come from energy/oil companies, real estate/development agencies, and financial institutions.
- Affluent individuals, who value Avila Beach and Port San Luis and will be inspired to preserve its history and character.
- Local businesses, inspired to support the beachfront area by their entrepreneurial interests.
- Foundations committed to preserving the historic and cultural value of the central coast.
- State and federal government funding.

Foundation research, (see appendix,) suggested 24 potential funding opportunities for the rehabilitation of the Avila Pier. Of the 24 suggested, the following are considered most likely to support the project:

- Avila Beach Community Foundation
- California Department of Fish and Wildlife
- California State Coastal Conservancy
- Hind Foundation
- Harold J. Miossi Charitable Trust
- PG&E Corporation Foundation
- San Luis Obispo County Community Foundation
- Wildlife Conservation Board

Relationships with these institutions need to be strengthened in order to encourage significant giving. The remaining suggested foundations have the potential to support the renovation, and will require significant outreach, the building of personal relationships, and ongoing collaborations.

Note that the trend among foundations engaged in capital support is to provide grants once the majority of the goal (60% – 80%) has been committed, construction costs are validated, and permits are secured or imminent.

Some organizations provide the opportunity for the *Friends of Avila Pier* to collaborate, which would strengthen the community-funding base. Strategic, mutually beneficial partnerships can be forged with many groups including the Avila Beach Civic Association, the Avila Beach Community Service District, the Avila Business Association, the Avila Valley Advisory Council, and the San Luis Yacht Club. Strengthening the profile of Avila Beach to the broader region would benefit everyone.

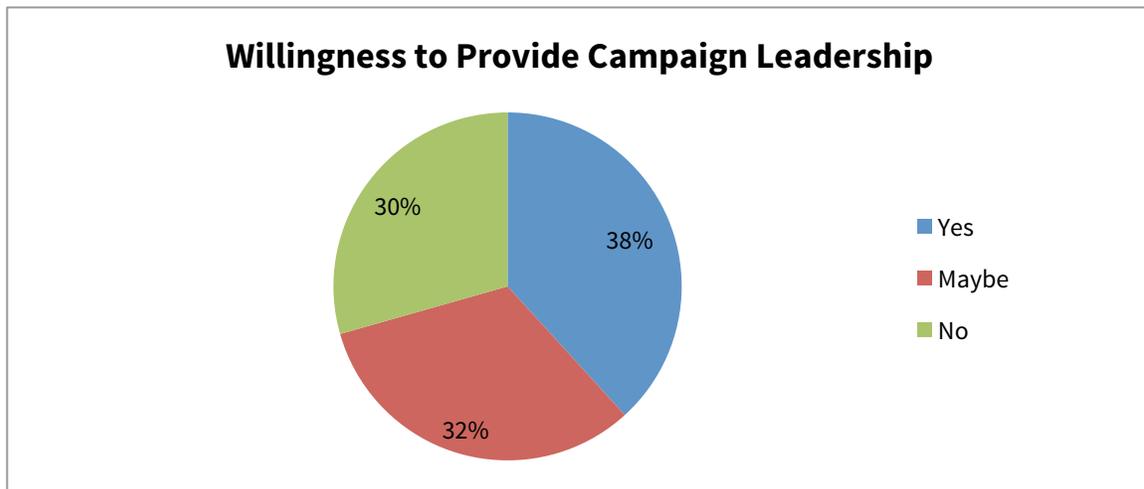
The majority of interviewees (83%) believe that supporters of the project will appreciate recognition for their business, foundation, or family. Naming opportunities or sponsorships will be inspiring to potential donors, similar to the approach promoted both in the Cayucos Pier and Pismo Beach Pier projects. Recognition might be placed on the Pier or at the base of the Pier, and might include the following options:

- Sponsor a piling, plank, or a meter of the Pier.
- Benches, lighting, and trashcans.
- Educational signage on the Pier that describes local geography and wildlife.
- An art installation surrounded by naming tiles.

3. **FINDING:** *The study did reveal potential leadership to support a community-wide fundraising effort.*

CONCLUSION: *Commissioners, Study Advisory Committee members, interviewees, and other community leaders should be recruited to lead the Avila Pier rehabilitation funding effort. Working together, there is adequate interest to guide the project.*

Seventy percent (70%) of the interviewees may be willing to provide some form of campaign leadership, which is extremely positive for a study of this kind. Thirty-eight percent (38%) said they would serve in a leadership role and 32 percent indicated that they might. For those who said “maybe”, the decision to provide leadership would hinge on the final scope of the project and the funding goal. Others mentioned that their participation would be contingent upon a full commitment by District staff and the Commissioners to the project.



The District will need to instill confidence in stakeholders that this project is a priority and leaders will need to be recruited in a manner that addresses their concerns. Beyond the interviewees’ own interest in leadership, they suggested the names of those whose involvement would be influential. Suggested names will need to be evaluated and access will need to be identified before they are approached to participate.

Port San Luis Harbor District

AVILA PIER FEASIBILITY STUDY

Section III: Recommendations

This section contains recommendations that outline the steps NETZEL GRIGSBY ASSOCIATES, INC. believes Port San Luis Harbor District must take to capitalize on strengths, correct real or perceived challenges, and ultimately achieve their maximum fundraising potential.

1. Resize the renovation of the Avila Pier, reducing the overall cost of the project to more appropriately align with the funding requirements of other local pier projects including the Cayucos Pier and Pismo Beach Pier.
 - Consider options to modify the magnitude of the Avila Pier rehabilitation, such as reducing the overall footprint of the Pier.
 - Consider phasing options to repair sections of the Pier and incrementally open the Pier to the public.
 - Costs deemed inspirational would be under \$10 million overall, with the private donations generating approximately \$1 to 2 million.
2. Parallel to resizing the project, focus on building and strengthening leadership of the *Friends of the Avila Pier* board.
 - Thoughtfully recruit leadership to intersect with diverse spheres of influence.
 - Provide orientation and tools to ensure fundraising is specifically noted as an expectation of board members.³
 - Capitalize on the momentum of the study and involve select members from the Study Advisory Committee, Commission, District staff, interviewees, and other high-profile community leaders.
3. Explore collaboration opportunities that will be mutually beneficial and will maximize impact for both entities.
 - Community groups, businesses associations, and conservation groups are likely partners.⁴
 - A model for this spirit of collaboration was successful in Avila Beach during the Coastal Development Plan 1999 – 2000, when government and stakeholders were engaged at a high level to benefit the community.

³ Grace, CFRE, Kay Sprinkel. *The AAA Way to Fundraising Success: Maximum Involvement, Maximum Results*. Seattle, WA: Whit Press, 2009. Print.

⁴ Strategic, mutually beneficial partnerships can be forged with many groups including the Avila Beach Civic Association, the Avila Beach Community Service District, the Avila Business Association, the Avila Valley Advisory Council, and the San Luis Yacht Club. Strengthening the profile of Avila Beach within the broader region would benefit everyone.

4. Pursue a funding package, over the next five years, in the following sequence, (see timeline in appendix) which includes:
 - State and federal funding opportunities for 50 to 60 percent of the goal for years one through three of the five-year window.
 - Work in this area is ongoing, however San Luis Obispo faces special challenges.⁵
 - Contract with a state and federal grant-writing specialist to submit and manage grant applications on behalf of the District.
 - Assessments or bonds for 20 to 30 percent of the goal over years one through three of the five-year window.
 - Pursue options for San Luis Obispo County Transient Occupancy Tax (TOT).
 - Bond indebtedness, parcel taxation, and/or an increased assessment for the Special District may also hold promise.
 - These options will require a significant investment of time and dollars to mount a voter campaign.
 - The defeat of Measure J⁶ in the November 2016 election may signal a lack of public willingness to fund community projects through increased taxation or assessment.
 - Key political leadership will be required in order to succeed.
 - Foundation funding opportunities for 10 percent to 15 percent of goal over years three through five of the five-year window.
 - Based on the foundation research, (see list in appendix,) focus on building relationships with the eight priority foundations identified.
 - Continue efforts to build relationships with the remaining eighteen foundations through a network of volunteers to establish access and collaboration.
 - Members of the *Friends of Avila Pier* can be instrumental in opening doors and maintaining relationships with foundations.
 - Community funding for 10 percent to 20 percent of the goal over years three through five of the five-year window.
 - Inspire the community of individuals and businesses through a “capstone campaign” to secure the final dollars to rehabilitate the Avila Pier.
 - Consider partnering with an established, well-regarded nonprofit organization in Avila Beach to act as the fiscal agent and coordinator for the philanthropic campaign and raise funds on behalf of the Avila Pier Rehabilitation Project.

⁵ San Luis Obispo is one of 19 counties in California with populations between 100,000 and 500,000, which are often competing for the same state and federal dollars. With the high cost of housing, a high level of education, stable median income, and low unemployment levels, SLO County is not commonly thought to be an area requiring assistance.

⁶ Measure J was a proposed half-percent sales tax in support of transportation projects throughout San Luis Obispo County. It was narrowly defeated, garnering 66.31 percent of the needed 66.61 percent of voters required to pass. This shortage represents only 500 votes.

5. Strengthen communication and engagement efforts to alleviate the perceived divide between the District and the community at large and to increase confidence and trust in the District and Commission.
 - Continue to build on the success of Town Hall meetings, which are an excellent way to engage the community.
 - Designate ambassadors to make presentations to local service clubs and civic associations, partnering with District staff and Commissioners. This may be a task the *Friends of Avila Pier* can assume.
 - Assemble a Task Force of willing community and business leaders, to discuss opportunities for the Avila Pier to generate revenue, improve maintenance, and plan for the future. These individuals will become advocates in the community and inspire confidence in the District.
 - Engage community members and civic and business groups in activities that enhance the Pier and unite the community through hands-on activities such as beach-cleanup days, *canines and coffee* events at Port Beach, etc.
 - Increase presence at community events, leveraging staff time through volunteers.
 - Allocate resources to the wide-spread dissemination (digital and print) of current District concerns, priorities, and actions.
6. Build an infrastructure to encourage and manage increased volunteerism and philanthropy, which includes the development of systems and protocols to process and track activities and donations.
7. At the appropriate time, hire professional fundraising counsel to assist with campaign planning and implementation.
8. Follow up with interviewees to report study results and communicate the District's plan for moving forward. Meet personally with select interviewees and send letters of appreciation with an assessment synopsis to others.

Port San Luis Harbor District

AVILA PIER FEASIBILITY STUDY

Section IV: Appendix

Port San Luis Harbor District

Avila Pier Feasibility Study

List of Interviewees

Bill Almas

Jana Barter

Will Bellis

Ray Belnap

Karla Bittner

Jim Blecha

Lucinda Borchard

Drew Brandy

Ann Brown

Vicki and Howard Carroll

Leonard Cohen

Lynn Compton

Chris Dorn

Jim Dummit

Sandy and Val Gillespie

Julia and Gerald Hartzell

Lynn and Chris Helenius

Adam Hill

Tom Jones

Pete Kelley

Andrea Lueker

Mary Matakovich

Ray Mattison

Archie McLaren

Carolyn Moffatt

Lisa Newton

Bill Price

Mike Ritter

Wilda Rosene

Rob Rossi

Linda and Darrel Rundstrom

Joan Sargen

John Sorgenfrei

Bob Vessely

Richard Zacky

Advisory Interviews

Deb Foughty

Port San Luis Harbor District

Avila Pier Feasibility Study

Study Advisory Committee

Jim Blecha, Co-Chair

Commissioner

Mary Matakovich, Co-Chair

Commissioner

Karla Bittner

Volunteer

April Brannum

Administrative Secretary

Loch Dreizler

Facilities Manager

Brittany Garcia

Account Manager, Matchfire

Sandy and Val Gillespie

Volunteers

Andrea Lueker

Harbor Manager

Lisa Newton

Volunteer

Bob Pusanik

Volunteer

Mike Ritter

Volunteer

Linda and Darrel Rundstrom

Volunteers

Kristen Stout

Business Manager

Port San Luis Harbor District

Avila Pier Feasibility Study

Harbor Commissioners

As of December 14, 2016 as shared with interviewees

Dave Kirk, President (outgoing)

Term 2013 – 2016

Mary Matakovich, Vice President

Term 2015 – 2018

Drew Brandy, Secretary

Term 2015 – 2018

Bill Barrow, Commissioner

Term 2013 – 2016

Jim Blecha, Commissioner

Term 2013 – 2016

Bob Vessely, Commissioner (incoming)

Term 2017 – 2018

Port San Luis Harbor District

Avila Pier Feasibility Study

Schedule of Gifts to Achieve \$17,000,000 Goal

(Gifts from individuals, businesses, and foundations may be paid over three to five years)

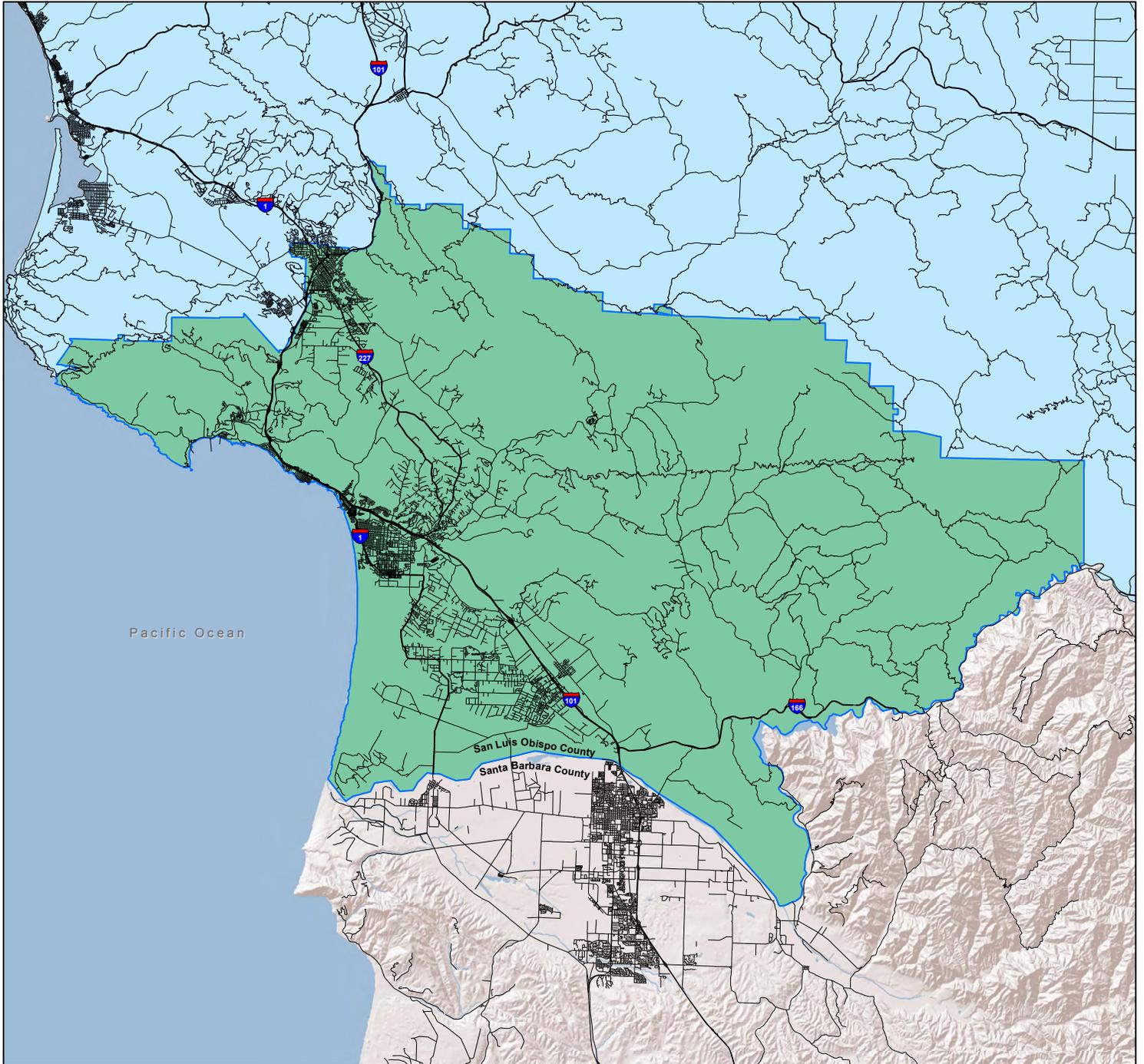
| # of Gifts | In The Range Of | Will Produce | Cumulative Production | Percent of Total |
|------------|-----------------------------|--------------|-----------------------|------------------|
| 1 @ | \$5,000,000 and above = | \$5,000,000 | \$5,000,000 | 29.4% |
| 2 @ | \$1,000,000 – \$4,499,999 = | \$2,000,000 | \$7,000,000 | 41.2% |
| 5 @ | \$500,000 – \$999,999 = | \$2,500,000 | \$9,500,000 | 55.9% |
| 10 @ | \$250,000 – \$499,999 = | \$2,500,000 | \$12,000,000 | 70.6% |
| 22 @ | \$100,000 – \$249,999 = | \$2,200,000 | \$14,200,000 | 83.5% |
| 29 @ | \$50,000 – \$99,999 = | \$1,450,000 | \$15,650,000 | 92.1% |
| 34 @ | \$25,000 – \$49,999 = | \$850,000 | \$16,500,000 | 97.1% |
| 40 @ | \$10,000 – \$24,999 = | \$400,000 | \$16,900,000 | 99.4% |
| Many @ | Under \$10,000 = | \$100,000 | \$17,000,000 | 100.0% |
| 143 | TOTAL | \$17,000,000 | | |

— GIFT PAYMENT INFORMATION —

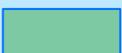
- **Payments may be made over a period of 3 to 5 years.**
- **Payments may be made via cash, debit and/or:**
 - ~ Real estate
 - ~ Appreciated securities (including mutual funds)
 - ~ IRA Mandatory Distribution or Rollover
 - ~ Paid-up life insurance
 - ~ Other planned gift arrangements
- **Gifts are tax deductible to the full extent of federal and state laws.**

Port San Luis Harbor District Service Area & Sphere of Influence Adopted: December 2007

[Return to Table of Contents](#)

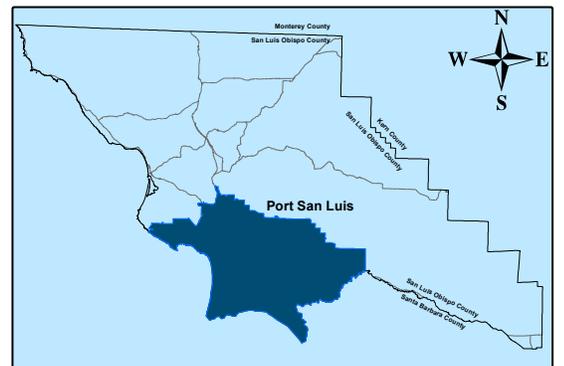


Legend

-  Major Roads
-  Service Area
-  Sphere of Influence
(Same as Service Area)



Prepared By SLOLAFCO
Name: Port San Luis_SOI Bndy
Date: 7/20/2011





PORT SAN LUIS HARBOR DISTRICT

Case for Avila Pier Rehabilitation

Project Summary

Where are we now: Due to storm damage and natural corrosion, the Avila Pier has been deemed unsafe and public access has been restricted. Of the Pier's 700 pilings, 190 have severe or major damage and another 239 have advanced deterioration.

What needs to be done: According to engineers the Avila Pier is structurally unstable and in vital need of repairs, which include the replacement of pilings as well as renovations to the Pier's decking and other structural components. The Avila Pier will remain closed to the public until it is rehabilitated.

How will we get there: The Harbor District has partnered with a local fundraising consulting firm to conduct a feasibility study among individuals, businesses, and foundations to evaluate community interest in the Avila Pier Rehabilitation Project. The Harbor Commissioners propose a \$17 million funding package to generate the funds required to repair the Avila Pier to its existing footprint and reopen it for continued public access and recreation.



Avila Beach Pier: The Heart of Avila

At the end of Avila Beach's wide, sandy shore, the Avila Pier anchors the quaint town of Avila Beach to San Luis Bay—framed by Point San Luis on the West and Avila Point on the East. This picturesque wooden pier extends 1,600 feet over the serene waters of the Pacific and offers an opportunity for tourists and locals alike to connect with the ocean.

Visitation to Avila Beach has steadily increased over the past decade and Avila has become one of the prime destinations for people looking to enjoy our beautiful beach and pristine coastline. The Avila Pier provides the means for the public to access a variety of wildlife-centric activities, fish, or simply take a relaxing stroll. In recent years, the Pier has become a premier site for viewing the wide array of marine mammals and birds that migrate to feed in the calm, shallow waters of the bay.

If you have visited Avila Beach recently you may have noticed a white 'Pier Closed' sign hanging solemnly on a chain-link fence, which barricades the entrance to the Avila Pier. After the Pier began to shift under the weight of exceptionally large crowds, structural engineers confirmed that the Pier was unstable and unsafe. The Avila Pier has been closed to the public since June 2015.

Project Vision

The Avila Pier, a public facility operated by the Port San Luis Harbor District, has been an integral part of our coastal history and local landscape since the early-19th century. Due to storm damage and natural corrosion, the Avila Pier has been closed to the public indefinitely.

The Harbor Commissioners seek to rehabilitate the Avila Pier to its original condition and existing footprint. A \$17 million funding package is proposed to renovate the Pier, provide continued public access for fishing, walking, wildlife viewing, and breath life back into the *Heart of Avila*.

“For those who don’t boat, the Pier is how they get out over the water. The Avila Pier is how they connect with the ocean.”

— Commissioner Jim Blecha

Port San Luis

Port San Luis is a Special District located just past the town of Avila Beach. In 1954 the citizens of our special district voted to create and fund a Harbor District for the Port of San Luis. The mission of the Port San Luis Harbor District is to serve the public with an array of commercial and recreational boating, fishing, and coastal-related opportunities, while ensuring an environmentally responsible, safe, well-managed, and financially sustainable harbor that preserves our marine heritage and character.

Fishing

Dust off your fishing gear, grab your ice chest, and enjoy a beautiful day fishing from the Avila Pier.

This is an image that, for the past year, has faded for many members of the community. Port San Luis remains a regional destination for recreational fishers who use the Port’s facilities, including the Avila Pier (which is publicly accessible free of charge and requires no license), to fish for rockfish, salmon, sea bass, and other species depending on the season. Since the Pier’s closure, tourists and locals looking to cast their lines into the water have been relocated to other areas.



Recreation

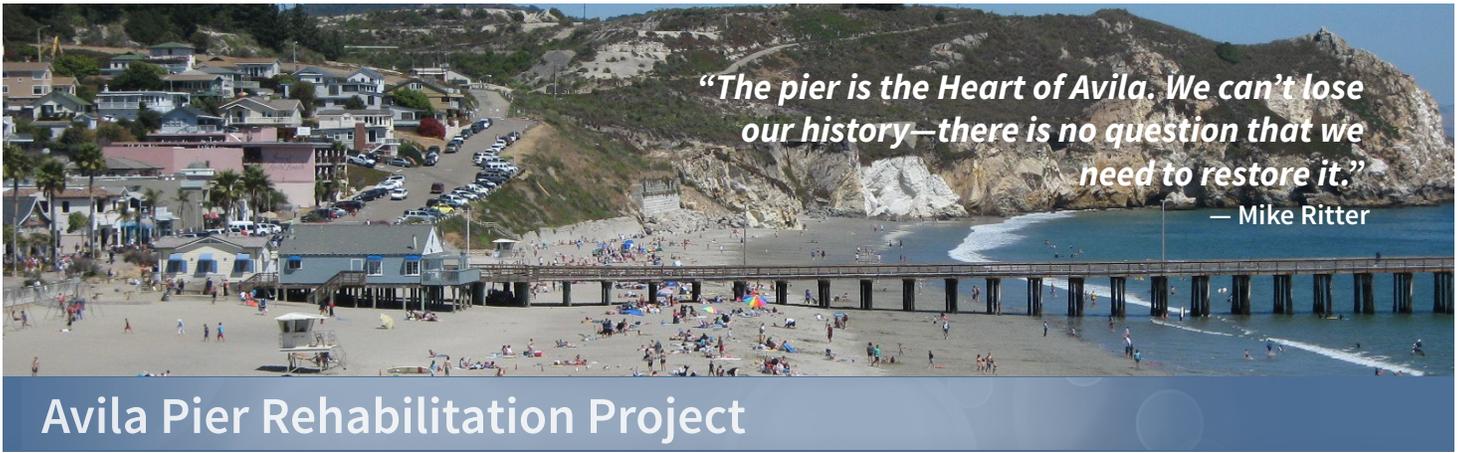
Recreation continues to play a significant role in the use of the Harbor District’s facilities, resulting in increased demand on District resources including maintenance, Harbor Patrol, and administrative staff. The District’s beaches host hundreds-of-thousands of visitors annually for traditional beach activities, as well as boating and swimming. The restored 19th century Point San Luis Lighthouse is another very popular destination, owned by Port San Luis Harbor District and restored, managed, and maintained by the Point San Luis Lighthouse Keepers, our non-profit partner. The District has a proven track record of raising funds and due to the success of the Lighthouse Keepers, The Harbor District is looking at a similar model to raise the funds necessary to rehabilitate and maintain the Avila Pier.



Development

In 1978, the District purchased the site now known as Harbor Terrace. With permits in place and a developer/operator identified, the project is moving forward. Once completed, Harbor Terrace will feature space for marine gear and boat storage, and overnight accommodations including walk-in tent camping to RV sites and self-contained cabins. The site will also feature commercial space. While maintaining its essential functions in support of coastal dependent uses, the project will also increase visitor access to the District and the coast. The Avila Pier provides the perfect backdrop to the Terrace and its rehabilitation will enhance the value of, and continue to draw visitors to, Avila Beach.





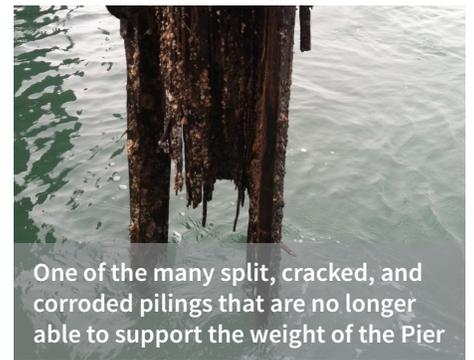
The Avila Pier offers a tranquil escape that is not available on the other piers. Travelers come from miles to walk the historic wooden planks of the Avila Pier looking to catch a glimpse of the areas wildlife or watch the setting sun. The Harbor District is creating a 501(c)(3) nonprofit partner organization, Friends of Avila Pier, to work with the District to help raise the funds necessary to rehabilitate and maintain the Avila Pier.

At the west end of Avila Beach, the mouth of San Luis Creek opens to the Pacific, where dog owners can be found in the mornings and evenings socializing with neighbors and their four-legged companions. To the east, the beach extends to a rocky point which hugs the bay. Uniting the two ends of the beach in a seamless transition of white sand and wooden pilings, is the Avila Pier. Since the 1900’s, there has always been a pier in Avila and losing the Pier would forever change the Avila Beach experience. More than just a pier, the Avila Pier is a part of our history—tethered to generations of memories.

Originally constructed in 1908, the Avila Pier was an important fishing and passenger wharf. The Pier suffered major storm damage throughout the years, and again in March 1983. With assistance from the Federal Emergency Management Agency (FEMA), the Harbor District was able to rebuild the Pier over 30 years ago. Due inclement weather and natural corrosion, the Avila Pier is once again in vital need of rehabilitation and this time it is up to us to help the District create a funding plan to save the Pier. Through concentrated, coordinated fiscal planning we want to ensure the Avila Pier is rehabilitated and maintained for our community—now and into the future.

Goals of the Avila Pier Rehabilitation Project:

- Develop a plan to financially support the Pier’s rehabilitation
- Revive the Pier to its original appearance and footprint, enhance durability, and extend longevity
- Maintain public access to the Pier, tourism, and Avila Beach as a destination
- Preserve the beach culture and history of Avila Beach
- Provide value to visitors, residents, business owners, and District constituents



AVILA PIER FEASIBILITY STUDY



“Everyone in Avila Beach has an Avila Pier story. The Avila Pier is a part of the community and we would lose generations of memories if we are not able to repair it.”

— Anonymous

Avila Pier: Past, Present, and Future

Past:

- **1908** – The Pier was rebuilt by the County of San Luis Obispo, replacing the People’s Wharf, which was destroyed in a major storm in 1878.
- **March 1983** – Since construction, the Pier sustained significant storm damage throughout the years and was repaired after each event.
- **1984** – Ownership of the Pier transferred to Port San Luis Harbor District and the pier was re-constructed by the District through 1985.
- **2000/01** – Unocal replaced the base of the Pier during a larger clean-up project.

Present:

- **March 2014** – Storm caused significant damage to the Pier’s decking and other structural components. Harbor District conducted a survey to assess the damage and subsequently sought professional consultation.
- **Fall of 2014** – Shoreline Engineering of Morro Bay hired to assess the Pier and develop preliminary construction plans for pile replacement.
- **June 2015** – Humpback whales visit the bay causing increased pedestrian traffic, which heightened concerns of structural integrity and public safety.
- **June 19, 2015** – Due to safety concerns, the Harbor Commissioners closed the Avila Pier until repairs and renovations can be funded.

Future:

- **Time** – Depending on funding sources the Harbor District looks to begin repairs and renovations in 2017/18.
- **Funding** – The Harbor District has engaged a local fundraising consulting firm to assess funding opportunities. A goal of \$17 million for repairs, renovations, and maintenance was derived based on a ratio used to rebuild the Cayucos Pier. The success of the proposed funding package will depend on the committed involvement and financial support from local community members, businesses, and foundation and government grants.
- **Design** – The Harbor Commission has decided to move forward with a design that includes repairing and refurbishing the existing structure to its current footprint and original, pre-corroded/pre-damaged condition.
- **Planning, Engineering, and Construction** – At the appropriate time, the Harbor District will seek bids for the planning/engineering of the reconstruction. To extend the life of the pier and to minimize the impact of driving piles through the oil plume, steel piles may be used instead of wood where appropriate. A public bidding process will be used to choose a qualified contractor.

Estimated Project Requirements

Direct Costs

| | |
|--|---------------------|
| Renovate/Refurbish Pier | \$12,250,000 |
| Inspections, Surveys, and Project Management | \$377,000 |
| Signage | \$36,000 |
| Design and Construction Contingencies | \$1,487,000 |
| Escalation | \$500,000 |
| Sub Total | \$14,650,000 |

In-Direct Costs

| | |
|------------------------------------|------------------|
| Feasibility Study | \$29,000 |
| Campaign Materials and Recognition | \$44,000 |
| Campaign Counsel (2 years) | \$198,000 |
| Clerical Assistance (2 years) | \$28,000 |
| Sub Total | \$299,000 |

Other

| | |
|---------------------------------|--------------------|
| Financing Costs | \$747,000 |
| Allowance for Pledge Reductions | \$304,000 |
| Maintenance Endowment | \$1,000,000 |
| Sub Total | \$2,051,000 |

Funding Goal **\$17,000,000**



PORT SAN LUIS
HARBOR DISTRICT

3950 Avila Beach Drive / P.O. Box 249
Avila Beach, CA 93424
www.portsanluis.com

Port San Luis Harbor District
Avila Pier Rehabilitation Project
Timeline

| | 2017 | | 2018 | | 2019 | | 2020 | | 2021 | |
|---|---|--|------------|------------|----------------------|-------------------------------------|------------|------------|--------------|------------|
| Month range: | Jan - June | July - Dec | Jan - June | July - Dec | Jan - June | July - Dec | Jan - June | July - Dec | Jan - June | July - Dec |
| Biannual Count: | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 1. Resize Project | Assess / Request Bids | Communicate New Plan | | | | | | | | |
| 2. Friends of Avila Pier – Organization Development | Recruit Board Readiness & Growth | | | | | | | | | |
| 3. Community Partnership Building | Assess Strategic Needs | Develop Long-term Partnerships with Community Groups | | | | | | | | |
| 4a. Pursue State and Federal Funding | Hire Grant Writer | Application Process / Impact Visits Where Possible | | | | Secure Funds | | | | |
| 4b. Explore Assessment, Bond, and TOT Increase | Seek Input | Implement Strategies | | | | Secure Funds | | | | |
| 4c. Pursue Private Foundation Funding | | | | | Develop Partners | Application Process / Impact Visits | | | Secure Funds | |
| 4d. Campaign for Private Donations | | | | | Campaign Recruitment | Committee Work / Impact Visits | | | Secure Funds | |
| 5. Business Task Force for Overall Revenue Generation | Recruit Members & Define tasks | Implement Actions | | | Evaluation | | | | | |
| Project Wrap-Up and Review | | | | | | | | | Evaluation | |
| Biannual Count: | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Month range: | Jan - June | July - Dec | Jan - June | July - Dec | Jan - June | July - Dec | Jan - June | July - Dec | Jan - June | July - Dec |
| | 2017 | | 2018 | | 2019 | | 2020 | | 2021 | |

| |
|----------------------|
| KEY |
| Planning/Recruitment |
| Implementation |
| Wrap-Up |

Port San Luis Harbor District
Avila Pier Feasibility Study
Foundation Prospect Research

| Prospect | Officers/Directors | Gift Range | Interests | Application Information | Notes |
|---|--|------------------------------------|--|---|--|
| 1 Adams Legacy Foundation P.O. Box 1957 Los Alamitos, CA 90720-1957 Telephone: (562) 431-0011 Contact: Blair Carty, Executive Director E-mail: bcarty@adamslegacyfoundation.org www.adamslegacyfoundation.org | Peter D. Adams Rebecca B Adams Blair Carty | 2015, Total giving: \$175,944 | Environment Land resources Natural resources | See foundation web site for complete application guidelines. Application form required. | Giving primarily in CA, OH and Washington, DC. |
| 2 The Borch Foundation 14315 Taos Dr. Saratoga, CA 95070-5567 Telephone: (408) 395-5585 | Andrea W Borch Christopher R Borch | 2015: Total giving: \$462,000 | Marine science Water resources | Application form not required. Initial approach: Letter. Deadline(s): None. | Giving primarily in CA and SC. |
| 3 James G. Bower Foundation 26 W. Micheltorena St. Santa Barbara, CA 93101-7169 Telephone: (805) 564-8814 Contact: Harvey Bottelsen, Chair E-mail: info@jsbowerfoundation.org www.jsbowerfoundation.org | Harvey Bottelsen Jon Clark Christopher A. Jacobs David Alvarado | 2014: Total giving: \$1,940,512 | Environment | Full proposals are by invitation only. Application guidelines and form available on foundation web site. Application form not required. Initial approach: Submit initial proposal online, via foundation web site. Deadline(s): See foundation web site for latest deadlines. | Giving primarily in Santa Barbara, CA. |

*Green highlight indicates best potential match

Port San Luis Harbor District
Avila Pier Feasibility Study
Foundation Prospect Research

| Prospect | Officers/Directors | Gift Range | Interests | Application Information | Notes |
|---|---|---|---|---|--|
| 4 Brittingham Family Foundation 1482 E. Valley Rd., Ste. 703 Santa Barbara, CA 93108-1200 Telephone: (805) 969-5415 E-mail: info@brittinghamfoundation.org | Scott Brittingham Ella Brittingham | 2014: Total giving: \$3,597,364 | Environment | Application form not required. Initial approach: Online application. Deadline(s): None; however applications received by Nov. 1 will most likely be considered for funding in the following calendar year. | Giving primarily in CA, with emphasis on Santa Barbara and WI. |
| 5 Avila Beach Community Foundation P.O. Box 297 Avila Beach, CA 93424-0297 Telephone: (805) 595-4095 Contact: Rick Cohen, Exec. Dir. Fax: (805) 627-1952 E-mail: avilafoundation@gmail.com www.avilabeachfoundation.org | Julian Varela Mike Ginn Carolyn Morton Rick Rowe Rick Cohen Lucinda Borchard Chris DeWeese Michael Faber Bill Gerrish Justin Hodges Percy Jones Steve Johnson Steve May Mike Ritter Richard Zacky | 2013: Total Giving: \$57,492 Grants high: \$15,750 | Community and economic development Community improvement | Application form required. Initial approach: Submit application form and attachments. Board meeting date(s): Jan., Apr., July, and Oct. Deadline(s): Sept. 30. Additional information: Funding of smaller projects may occur other times throughout the year outside of the grant-making process and calendar; contact foundation for more information. | Giving limited to Avila Beach and Avila Valley in San Luis Obispo County, CA. *Has given past support |

*Green highlight indicates best potential match
 PAGE 4.13

Port San Luis Harbor District
Avila Pier Feasibility Study
Foundation Prospect Research

| Prospect | Officers/Directors | Gift Range | Interests | Application Information | Notes |
|--|---|--|---|---|--|
| 6 Paul M. Angell Family Foundation 4140 W. Fullerton Ave. Chicago, IL 60639-2106 Telephone: (773) 628-6980 Contact: Kim Van Horn, Chief Admin. Off. E-mail: kim@pmangellfamfound.org pmangellfamfound.org | Charles T. Angell James S. Angell Michael T. Angell | 2015 Total Giving: \$8,691,742 Grants: High: \$1,000,000; low: \$5,000 | Community and economic development Environment | Applications are by invitation only, upon review of Letter of Inquiry. Application form required. Initial approach: Create an account on the foundation's web site, then use the online Letter of Inquiry process. Deadline(s): Early Sept. through mid Feb. (for spring cycle); late Mar. through mid Aug. (for fall cycle). See foundation web site for current deadlines. Final notification: Late May (for spring cycle), late Nov. (for fall cycle). | Giving primarily in CA, Washington, DC and IL. |
| 7 Margo & Joe Osherenko Foundation P.O. Box 22508 Santa Barbara, CA 93121-2508 Application address: 853 Via Grenda, Santa Barbara, CA 93103 | Gail Osherenko | 2014 Total Giving: \$51,530 | Environment Natural resources | Application form not required. Initial approach: Proposal. Deadline(s): None. | Giving on a national basis, with emphasis on CA. |

*Green highlight indicates best potential match
 PAGE 4.14

Port San Luis Harbor District
Avila Pier Feasibility Study
Foundation Prospect Research

| Prospect | Officers/Directors | Gift Range | Interests | Application Information | Notes |
|---|--|---|-------------------|---|---|
| 8 June G. Outhwaite Charitable Trust 26 W. Anapamu St., Ste. 103 Santa Barbara, CA 93101-3144 Telephone: (805) 560-0841 Contact: Jean Volmar Fax: (805) 560-0811 E-mail: jean@outhwaitefoundation.org www.outhwaitefoundation.org | C. Michael Cooney Kent L. Englert John S. Poucher | 2013 Total Giving: \$889,500 Grants: high: \$100,000; low: \$500 | | Santa Barbara Foundation Roundtable's Common Grant Application Form accepted or Outhwaite Foundation Application form accepted; application guidelines and forms available on foundation web site. Application form required. Initial approach: Submit application preferably by e-mail. Copies of proposal: 1 Deadline(s): July 31 | Giving primarily in South Santa Barbara County, CA. |
| 9 Dorrance Family Foundation 7600 E. Doubletree Ranch Rd., Ste. 300 Scottsdale, AZ 85258-2137 Telephone: (480) 367-7000 www.dorrancefamilyfoundation.org | Bennett Dorrance Bennett Dorrance, Jr., Jacquelynn W. Dorrance Ashley Dorrance Kaplan | 2014 Total Giving: \$5,337,516 | Natural Resources | The foundation does not accept unsolicited grant applications. However, if your organization qualifies for a grant based on the foundation's grantmaking focus and eligibility requirements, please submit a letter of inquiry. Application form not required. | Giving primarily in AZ, CA and HI. |

Port San Luis Harbor District
Avila Pier Feasibility Study
Foundation Prospect Research

| Prospect | Officers/Directors | Gift Range | Interests | Application Information | Notes |
|--|---|---|--|--|---|
| 10 The PG&E Corporation Foundation 77 Beale St. San Francisco, CA 94105-1814 E-mail: communityrelations@exchange.pge.com www.pge.com | Tim Fitzpatrick Dinyar B. Mistry Hyun Park Rob Black Helen A. Burt John R. Simon | 2014 Total Giving: \$12,646,771 Grants: high: \$619,000; low: \$65 | Disaster reconstruction Environment Land resources Natural resources Parks | Unsolicited applications are rarely funded. Invitations are issued by PG&E representatives. Grants range from \$1,000 to \$5,000. Multi-year funding is not automatic. Application form required. Initial approach: Complete online application for local grantmaking. Deadline(s): Mar. 1 to Oct. 1 for local grantmaking; July 31 for Economic Vitality Grants; Nov. 1 for Bright Ideas Grants. | Giving primarily in areas of company operations in Northern and Central, CA. *Has given past Support |

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|--|--|------------------------------------|-------------|---|---|
| 11 Santa Barbara Foundation 1111 Chapala St., Ste. 200 Santa Barbara, CA 93101 Telephone: (805) 963-1873 Contact: Ronald V. Gallo, C.E.O. Fax: (805) 966-2345 E-mail: info@sbfoundation.org www.sbfoundation.org Grant application e-mail: grants@sbfoundation.org | Eileen F. Sheridan James Morouse Ronald V. Gallo Jan Campbell Dee Jennings Al Rodriguez Diane Adam Gretchen Milligan Peter MacDougall Cheri Savage Laurie Ashton Hugh M. Boss Frederick W. Gluck Stephen Hicks Ralph Iannelli Michael G. Mayfield Jennifer Murray Cathy Pepe Michelle Lee Pickett Niki Sandoval Robert Skinner Chris Slaughter Luis Villegas Polly Firestone Walker Michael D. Young | 2014 Total Giving: \$22,728,760 | Environment | Visit foundation web site for application forms and guidelines. Application form required. Initial approach: Application. Board meeting date(s): Jan., Mar., May, June, Sept., Oct., and Dec. Deadline(s): Varies. Final notification: Varies. | Giving limited to Santa Barbara County, CA. |

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|---|--|-----------------------------------|--------------------------------------|---|---|
| 12 San Luis Obispo County Community Foundation 550 Dana St. San Luis Obispo, CA 93401 Telephone: (805) 543-2323 Contact: Janice Fong Wolf, Dir., Grants & Progs. Fax: (805) 543-2346 E-mail: info@slocf.org www.slocf.org Additional e-mail: jwolf@slocf.org | Steve McCarty Mary Verdin Heidi McPherson Jim Glinn Bill Raver Jim Brabeck Claire Clark Lee Hollister Steven B. Jobst, MD Mike Miner Joan Parker Mike Patrick Barbara Partridge Ann Robinson Tom Sherman Johnnie Talley | 2013 Total Giving: \$1,453,638 | Environment Historic preservation | Visit foundation web site for application cover sheet and guidelines. Faxed or e-mailed applications are not accepted. Application form required. Copies of proposal: 6 Board meeting date(s): Monthly. Deadline(s): Varies. Final notification: Within 3 months. | Giving primarily in San Luis Obispo County, CA. |
| 13 Thornton S., Jr. and Katrina D. Glide Foundation 28120 Pierce Ranch Rd. Davis, CA 95616-9447 Telephone: (530) 753-3803 Fax: (530) 753-3849 E-mail: glidefoundation@sprynet.com www.glidefoundation.org | Richard D. Bruga Yvonne LeMaitre Russell E. White | 2015 Total Giving: \$994,284 | Environment Land resources | Applications must be delivered via USPS only—no Signature Required. All other carriers will be refused. See foundation website for downloadable application form. Application form required. Deadline(s): See foundation web site for current deadline. | Giving primarily in CA. Out of state applicants will be considered. |

*Green highlight indicates best potential match

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| 14 Friendship Fund Inc. 77 Summer St, 8th Floor Boston, MA 02110 Telephone: (617) 426-7080 | Diana H Crane Ellen Dbf Tully Andrea Erda Kat Bradley Bennet Charles Bradley Bennet, Jr. Lynn Bradley Leopold Bronwen Bradley Ballou Charles M Crane, MD Thomas S Crane Frances Crane Manson | 2015 Total Giving: \$258,083 | Environment | Application form not required. Initial approach: Letter. Board meeting date(s): Aug. Deadline(s): 4/1 | Giving primarily in CA, CO, CT, MA, NY and VA. |
| 15 Hillman Family Foundations 310 Grant St., Ste. 2000 Pittsburgh, PA 15219-2309 Telephone: (412) 338-3466 Contact: David K. Roger, Pres. Fax: (412) 338-3463 E-mail: foundation@hillmanfo.com www.hillmanfamilyfoundations.org | Henry L. Hillman David K. Roger C.G. Grefenstette Lisa R. Johns Elsie H. Hillman Juliet L. Hillman Simonds | 2014 Total Giving: \$27,483,252 | Environment | Prospective applicants should address grant requests and inquiries to one of the individual foundations administered by Hillman Family Foundations. Application form not required. Initial approach: Online. Board meeting date(s): Apr., June, Oct. and Dec. | California |

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| 16 Hind Foundation P.O. Box 13259 San Luis Obispo, CA 93406-3259 Telephone: (805) 544-0914 E-mail: greghind@hindfoundation.org www.hindfoundation.org | Greg Hind Jane Hind Kirsten Hind Meegan Hind | 2015 Total Giving: \$3,549,261 | Historic preservation | Formal applications are by invitation only, upon review of initial letter of inquiry. Application form not required. Initial approach: Letter of inquiry after creating an account on foundation website. Deadline(s): None. | Giving primarily in CA, with emphasis on San Luis Obispo County. |
| 17 Harold J. Miossi Charitable Trust P.O. Box 1025 San Luis Obispo, CA 93406-1025 Contact: Howard Carroll, Tr. www.miossicharitabletrust.org | Howard Carroll | 2014 Total Giving: \$671,810 | Community beautification Community improvement Environment Historic preservation | Application form required. Initial approach: Use online application on foundation website. Deadline(s): Jan. 1 through May 30. | Giving primarily in San Luis Obispo, CA. |
| 18 Writer Family Foundation 1510 Monte Vista Rd. Santa Barbara, CA 93108-1015 Telephone: (805) 565-3936 E-mail: writergeo@gmail.com | George S Writer George S Writer Judith H Writer Jeffrey H Writer | 2015 Total Giving: \$95,500 | Environment | Application form required. Initial approach: Proposal. Deadline(s): None. | Giving primarily in CA and CO. |

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| 19 | California State Coastal Conservancy 1515 Clay Street, 10th Floor Oakland, CA 94612-1401 Contact: Trish Chapman, trish.chapman@scc.ca.gov / 510-286-0749 http://scc.ca.gov/grants/grant-application/ | | No minimum or maximum. The Coastal Conservancy will base the size of awards on project needs, benefits and competing demands for existing funding. | | Prospective applicants must discuss their projects with Conservancy staff prior to completing or submitting this application. Proposals will be accepted on a continuous basis. In addition, periodically grant rounds will be advertised and applications will be accepted for projects of a particular type or for specific locations. | If you are mailing the digital application, please send it to: State Coastal Conservancy 1330 Broadway, 13th Floor, Oakland, CA 94612. |
| 20 | The Fairweather Foundation 1726 Cedarwood Dr. Minden, NV 89423-4726 Telephone: (775) 782-5174 | Joanne Hall Arthur E Hall | 2014 Total Giving: \$7,662,758 | Environment Historic preservation Natural resources | Contributes only to pre-selected organizations. Application form not required. Board meeting date(s): Fall | Giving primarily in CA, NV, and VA. |
| 21 | The McGee Foundation, Inc. P.O. Box 18127 Oklahoma City, OK 73154-0127 | Marcia Mcgee Bieber Patricia Mcgee Maino Charles Bieber Paula Love | 2015 Total Giving: \$620,000 | Historic preservation | Application form not required. Initial approach: Proposal. Board meeting date(s): Early May. Deadline(s): None. | Giving primarily in CA and Oklahoma City, OK. |

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| 22 Erickson Family Charitable Foundation 2027 Narrows View Cir. N.W., E-141 Gig Harbor, WA 98335-6814 Telephone: (858) 945-3738 | David L Erickson Sandra C Erickson | 2015 Total Giving: \$175,000 | Environment Historic preservation Land resources Natural resources | Unsolicited request for funds not accepted. Application form not required. | Giving primarily in CA, Washington, DC, and PA. |
| 23 Wildlife Conservation Board 1416 9th Street, Room 1266 Sacramento, CA 95814 Telephone: (916) 445-8448 https://wcb.ca.gov/Applications Contact: John P. Donnelly, Executive Director | | | | WCB meets four times a year, typically in February, May, August and November. Allow a minimum of six months from submittal of application to project approval. Prospective applicants for all habitat restoration or public access development projects should discuss their projects with WCB staff prior to completing or submitting an application. WCB staff will assist in determining whether or not an application should be submitted and will help in developing project features. WCB accepts proposals on a continuous basis, and will notify applicants about whether or not the proposal is acceptable or complete. | Contact the Program Manager for the appropriate WCB Restoration or Public Access Program, or Elizabeth Hubert, Restoration and Development Supervisor. |

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| 24 The California Department of Fish and Wildlife P.O. Box 944209 Sacramento, CA 94244-2090 Contact: Bruce Joab, Bruce.Joab@wildlife.ca.gov Phone: (916) 322-7561 | | Total Giving: \$250,000 | | https://www.wildlife.ca.gov/OS-PR/Science/Environmental-Enhancement-Fund/About A written notification will be sent to each applicant notifying them whether their application has been selected for a grant award or denied. | |