CENTRAL COAST ECONOMIC FORECAST 2013
OFFICERS

JIM ANDERSON, CHAIRPERSON
PHILLIPS 66 SANTA MARIA REFINERY

BRUCE RAY, VICE CHAIR
THE TRIBUNE

VIVIAN ROBERTSON, SECRETARY
CALIFORNIA MID-STATE FAIR

STEVE HARDING, TREASURER
RABOBANK, N.A.

BOARD

Bradford Anderson
Cal Poly Orfalea College of Business

Chris Connors
Zurn Wilkins

Maggie Cox
Barnett Cox & Associates

Tom Jones
Pacific Gas & Electric Co.

Mike Manchak
Economic Vitality Corporation of San Luis Obispo County

Candy Markwith
Sierra Vista Regional Medical Center

Steve McCarty
Stafford-McCarty Commercial Real Estate

Anthony Palazzo
PMSM

Anita Robinson
Coast National Bank

Matt Turrentine
Grapevine Capital Partners

Terry Westrope
Ocean Park Hotels, Inc. Courtyard by Marriott

Dick Willhoit
Estrella Associates, Inc.

Emeritus

Jim Brabeck
Farm Supply Company

Carrol Pruett
Rabobank, N.A.

www.centralcoasteconomicforecast.com
2013 San Luis Obispo County Non-Profit

Economic Impact Study
November 2013

Introduction from the Chairman

When a group of local volunteers launched the Central Coast Economic Forecast (CCEF) as an independent organization in 2010, we didn’t know what to expect. While we had focus and determination as we set out to create an economic information tool for San Luis Obispo County, what we didn’t have were the funds needed to assure a top notch program.

Happily for the project, our business, government and nonprofit leaders came through and supported the CCEF effort. Cal Poly and PG&E continue to be two of our most generous sponsors and are joined by literally hundreds of other supporters who step forward each year.

In our very first year, Greg Hind joined our effort and underwrote the CCEF with a $20,000 contribution. He made one small request of the CCEF: he asked that some of the funds be used to provide non-profit organization leaders with complimentary tickets to the annual event. Several tables of local nonprofit leaders joined Greg as guests at the 2010 annual event.

Greg’s family foundation has remained ardent supporters of our community’s nonprofit organizations, despite Greg’s passing in 2012.

The CCEF board of directors elected to honor the passion of Greg Hind and the Hind Family Foundation this year by commissioning a special report on the economic impact of nonprofit organizations in SLO County. It’s impossible to live and work in this community and not notice the magnitude of service and volunteerism our nonprofits provide. Our quality of life is directly affected by our nonprofit sector—not just in terms of programs, but in the power of the economic impact that comes with it. The report that follows is a first step in understanding the depth of this sector. We hope you will find the information useful.

We thank the Hind Foundation for its continued support of CCEF – and our community.

Sincerely,

Jim Anderson
2013 Chair
CCEF Board of Directors
## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary</td>
<td>1</td>
</tr>
<tr>
<td>Literature Review</td>
<td>3</td>
</tr>
<tr>
<td>Economic Impact of SLO-Based Non-Profits</td>
<td>4</td>
</tr>
<tr>
<td>Social Impact of SLO-Based Non-Profits</td>
<td>10</td>
</tr>
<tr>
<td>Conclusion</td>
<td>11</td>
</tr>
<tr>
<td>Appendix</td>
<td>13</td>
</tr>
</tbody>
</table>
Summary

<table>
<thead>
<tr>
<th>Impact</th>
<th>Output ($ Mil)</th>
<th>Employment</th>
<th>Labor Income ($ Mil)</th>
<th>State and Local Tax Revenue ($ Mil)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Effect</td>
<td>430.3</td>
<td>7,590</td>
<td>264.3</td>
<td>7.7</td>
</tr>
<tr>
<td>Indirect Effect</td>
<td>182.6</td>
<td>1,470</td>
<td>58.6</td>
<td>10.4</td>
</tr>
<tr>
<td>Induced Effect</td>
<td>185.9</td>
<td>1,430</td>
<td>56.2</td>
<td>16.0</td>
</tr>
<tr>
<td>Total Effect</td>
<td>798.8</td>
<td>10,480</td>
<td>379.1</td>
<td>34.0</td>
</tr>
</tbody>
</table>

Note: Numbers are rounded.
Source: IMPLAN; Calculations by Beacon Economics

The operations of non-profits play an enormous role in the vibrancy of the economy of California’s Central Coast and to the overall quality of life in the region. Non-profits help to educate children, encourage community engagement and activism, nurture creativity, and promote local business. Some organizations help to protect the environment, while others provide food, shelter, medical care, and a host of other services to residents. Wherever there is a social need in the Central Coast community, there is almost always a non-profit helping to provide those services. Many of the social benefits of non-profits are well recognized as they touch the lives of almost every resident, at both the places they live and work. What is often overlooked, however, is the economic impact that non-profits have on the regional economy.

Like a business, non-profits provide jobs to local residents and buy goods and services from local establishments. They support businesses in the Central Coast indirectly by creating additional demand for goods and services throughout the regional economy. Their spending at local businesses in turn encourages those businesses to spend more money on local goods and services, as well as hire more people. That spending leads to more income for residents, in the form of higher wages and new jobs. Much of that additional income is then spent locally on things like food, housing, and charity, further strengthening the regional economy.

The following report by Beacon Economics aims to quantify the short-term benefits non-profits provide to the economy of San Luis Obispo County and to pinpoint the important channels through which non-profits promote a more educated and productive workforce and enhance the quality of life for county residents. Moreover, the analysis in this report utilizes the latest digitalized tax filings provided by the U.S. Internal Revenue Service (I.R.S.). As a result, the estimations capture the total economic impacts of the 761 secular non-profits considered in this study. This represents a major advance over the 2006 non-profit economic impact study conducted by the United Way of San Luis Obispo County and Pacific Gas and Electric, where the estimations were based on 99 non-profits. Key findings of the current report include:
In 2012, non-profits in San Luis Obispo County generated nearly $800 million in economic output, supported over 10,000 jobs and over $379 million in labor income, and produced over $34 million in tax revenue for the state and local governments.¹

Total economic output generated by non-profits’ operations is equivalent to approximately 7.3 percent of the County’s gross domestic product.

About 70 percent of the 761 secular non-profits are classified as charitable organizations by the I.R.S., while 17 percent are classified as educational organizations, 7 percent as social welfare organizations, 4 percent as civic leagues, and 2 percent as other types of organizations. The combined expenditures made by charitable organizations accounted for the lion’s share of total non-profit spending at 85 percent.

Of the $798.8 million in total economic output generated by non-profit operations in San Luis Obispo County in 2012, over $430.3 million came from direct non-profit expenditures and nearly half ($368.5 million) came from secondary impacts. Spending generates a multiplying effect that significantly increases economic activity the region.

Non-profit operations directly supported 7,590 jobs in San Luis Obispo County, while the indirect and induced impacts of those operations supported about 2,900 jobs.

Non-profit operations directly generated $264.3 million in labor income and another $114.8 million through secondary effects that took place at suppliers of the non-profits and other businesses and organizations in San Luis Obispo County.

Although the ten largest non-profit organizations accounted for more than 60 percent of total spending by all nonprofits based in San Luis Obispo County, many of the smaller-scale organizations are supported by large networks of volunteers. Among the 61 surveyed organizations with less than 20 full-time equivalent employees, an average of 56 volunteers per full-time employee contributed an average of 50.6 hours last year.

Non-profits provide ample volunteering opportunities for local businesses and their employees. Research has demonstrated that workplace volunteerism increases employee engagement and productivity.

The economic impact generated by volunteer work is not captured by the expenditure-based analysis. Therefore, Beacon Economics’ estimates serve as the lower bound for the actual magnitude of total economic impact.

Beyond their economic impacts, non-profits in San Luis Obispo County generate a significant social impact that is difficult to quantify in short-term economic values. Some organizations serve as intermediaries that more efficiently reallocate valuable resources to people in need, while others provide life-changing assistance to individuals living at the margins of society. These activities generate long-term social and economic benefits that may not be immediately realized.

¹These economic impacts are conservative estimates. This is because the I.R.S. data do not include local non-profits that have parent-organizations located outside the County and do not file their own tax return.
Literature Review

Despite common perceptions, non-profits actually function very much like for-profit firms. Both types of organizations hire staff at market-competitive wages to provide goods and services that are in demand by consumers. However, in the case of non-profits, the goods and services provided are not considered profitable by most firms. Yet, because the actual operations of non-profits and for-profit companies are often very similar—including expenditure categories such as office rent or IT services—studies have applied the same methods used for analyzing the economic impacts of for-profit firms to analyzing the impacts of non-profit organizations. Among these studies, two stand out: a 2005 study by the ACTION Council of Monterey County and a 2006 study by the United Way of San Luis Obispo County and Pacific Gas and Electric. These two reports provide excellent models for Beacon Economics’ current analysis, and provide a general sense of the impacts that should be expected among San Luis Obispo County non-profits today.

In 2005, the ACTION Council of Monterey County commissioned a study to examine the impact of the non-profit industry within Monterey County. At the time of the study, there were a total of 1,212 registered non-profits in Monterey County, ranging from animal care and environmental organizations to religious organizations. The ACTION Council estimated that the combined economic impact in Monterey County from these non-profits totaled $1.5 billion, and payrolls of the non-profits and their expenditures on local goods and services were responsible for supporting 12,000 local jobs. From 2003 to 2004, each of these non-profits reached an average of 1,700 people per year, and collectively, the organizations reached more than three million people through direct services. The non-profits also reported over 1.3 million hours of volunteer service, which represents approximately 1,600 hours for the typical non-profit. The study concluded that outside the social impacts non-profits provide, such as helping to reduce the burden of taxpayers and improving the standard of living in the County through their wide diversity of services, they also generate a substantial local economic impacts in the form of jobs and economic activity.²

The 2006 non-profit economic impact study conducted by the United Way of San Luis Obispo County and Pacific Gas and Electric examined the impacts of non-profit organizations in San Luis Obispo County on the County economy. The administrators of the study surveyed 99 non-profit organizations regarding their 2005 revenues and expenditures (as defined in I.R.S Form 990), and their workforce, and then estimated the total output, jobs, and wages generated by their operations. The 99 surveyed non-profits were very evenly distributed based on total revenue and included human services and educational organizations. The study found that the total economic impact of the non-profits surveyed was nearly $243 million and that those non-profits were responsible for supporting 3,990 full-time equivalent jobs in San Luis Obispo County.

The study also concluded that for every two people directly employed by the surveyed non-profits, another job was indirectly supported or induced by the spending of those non-profits. In fact, the output traceable to the non-profits surveyed accounted for 2.2 percent of the total output of San Luis Obispo County—slightly less than the proportion of jobs that non-profits supported in the County (3.5 percent). The surveyed non-profits served 1.6 million clients, and on average, their services were valued at $1,400 per client.³

Although San Luis Obispo County non-profits generated an impressive $243 million in economic output and supported nearly 4,000 jobs in 2005, Beacon Economics undertook the current study knowing that the impacts of non-profits in the region were likely to be even greater in 2012. The United Way analysis surveyed 500 non-profits, out of which 99 valid responses were received. The 99 non-profits supplied I.R.S. Form 990 to the survey administrators and the expenditures they reported were the basis on which the impact analysis was modeled. In contrast, Beacon Economics’ current analysis uses all available tax data supplied directly by the I.R.S. and extrapolates the expenditures to the non-profits that are not required to, and did not file, Form 990. Consequently, the findings of the United Way study may diverge somewhat from the findings in this analysis. Nonetheless, the study provides the best available benchmark by which to compare the estimates generated below.

Economic Impact of SLO-Based Non-Profits

Data Collection

In this current economic impact analysis of non-profits in San Luis Obispo County, Beacon Economics based its expenditure estimates on the ‘Statistics of Income’ provided by the I.R.S. Specifically, Beacon Economics identified all tax-exempt organizations located in San Luis Obispo County in the “Exempt Organizations Business Master File Extract,” then merged selected financial data for those organizations that filed a tax return in calendar year 2012. In total, 1,206 of 1,502 tax-exempt organizations reported their total revenue, total income, and total assets. However, total functional expenses were only available for the 578 organizations that filed either Form 990 or Form 990-EZ. Beacon Economics estimated the total expenses for other non-profit organizations using the observed relationship between total expenses and commonly available financial information, as well as the organization type.

Note that some of the returns filed in 2012 were late filings for earlier tax periods. When a late filing was the only available record for an organization, researchers considered the financial information therein as a good estimate for year 2012.

Beacon Economics experimented with two estimation approaches. Because total revenue is a close predictor of total expense for the majority of organizations that filed a tax return in 2012, researchers first applied the ratio of the two to obtain the first set of estimates. The second set of estimates was based on coefficients derived from regressing total expense on total revenue, total assets, and type of organizations. Both sets of estimates generated identical aggregated expenses, which were consistent with the actual aggregated expenses from the 578 organizations that filed tax returns. Beacon Economics opted for the regression-based estimates because they had the smaller sum of squared errors.
Table 1: Section 501(c)(3) and 501(c)(4) Organizations in San Luis Obispo, Monterey, and Santa Barbara Counties, 2012

<table>
<thead>
<tr>
<th>County</th>
<th>Organizations 2012</th>
<th>Population 2012</th>
<th>Organization Per Thousand Residents</th>
<th>Total Revenue Reported ($ Mil)</th>
<th>Revenue Per Organization ($ Mil)</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Luis Obispo</td>
<td>1,230</td>
<td>274,804</td>
<td>4.48</td>
<td>416.6</td>
<td>0.34</td>
</tr>
<tr>
<td>Monterey</td>
<td>1,329</td>
<td>426,762</td>
<td>3.11</td>
<td>1,065.7</td>
<td>0.80</td>
</tr>
<tr>
<td>Santa Barbara</td>
<td>2,069</td>
<td>431,249</td>
<td>4.80</td>
<td>2,245.3</td>
<td>1.09</td>
</tr>
<tr>
<td>California</td>
<td>121,828</td>
<td>38,041,430</td>
<td>3.2</td>
<td>153,426.1</td>
<td>1.26</td>
</tr>
</tbody>
</table>

Note: Numbers are rounded.
Sources: I.R.S., Census Bureau; Calculations by Beacon Economics

It is worth noting that more than 8 in 10 of the tax-exempt organizations fall under Sections 501(C)(3)—charitable, educational, literary, or religious organizations, or organizations for public safety testing or to prevent cruelty to animals—and 501(C)(4) — civic leagues, social welfare organizations, and local associations of employees. Judging from the reported revenue per non-profit, the average size of these organizations tends to be smaller in the San Luis Obispo County than in neighboring Monterey and Santa Barbara Counties, and about a quarter of the the size of an average non-profit in California. However, their density, measured by the number of organizations per thousand residents, is higher than the state average and nearly as high as in Santa Barbara County (see table 1).

Because this study focuses on secular non-profits with a social component, Beacon Economics included Section 501(c)(3) and 501(c)(4) organizations but did not take into consideration churches and other religious organizations per I.R.S. definition. Also excluded were local associations of employees because their services are most likely restricted by membership. Of the 761 non-profits analyzed as part of this study, about 70 percent are classified by the I.R.S as charitable organizations. The combined expenditures of these charitable organizations constitutes 85 percent of the total spending by non-profit operations considered in this study (see figure 1). The I.R.S. data do not, however, include local non-profits that have parent-organizations located outside the County and do not file a tax return on their own. Due to this limitation, the total economic impacts presented under this study are conservative estimates.

---

⁶Additionally, adult leisure clubs, and fraternities and sororities that may have been misclassified were also removed. Normally, these organizations belong to 501(C)(7) and 501(C)(8) or (10), respectively.
⁷See appendix B for a complete list of the 761 non-profits.
To gain detailed, qualitative insights into the economic and social impacts of San Luis Obispo County non-profits, Beacon Economics developed and administered an open online survey that asked non-profits to provide information about their operations such as total number of employees and total volunteer hours (see appendix C for complete survey questionnaire). A total of 101 non-profits participated in the survey, out of which nearly 70 percent provided enough detail in their responses to serve as a supplement to this analysis. While the survey participants make up only a small fraction of the 1,502 tax exempt organizations located in San Luis Obispo County, they represent 38.5 percent of the total reported revenue for those organizations, indicating that they are among the largest non-profits in the County. Moreover, almost all of the survey participants are Section 501(c)(3) and 501(c)(4) organizations.

**Categories of Economic Impact**

To estimate the economic impact of San Luis Obispo County non-profits on the regional economy, Beacon Economics employed the IMPLAN modeling system in combination with the total estimated expenditures imputed from I.R.S. data. The key concept of the expenditures-based approach is that money spent by an organization in the local economy is transformed into revenues for other organizations and businesses. The IMPLAN modeling system is an input/output model that can be used to estimate the short-run impact of changes in the economy through the use of multiplier analysis. This includes an analysis of economic output, employment, wages and earnings, and tax effects.⁸

---

⁸See appendix A for detailed methodology.
Total Expenditures

Altogether, the 761 non-profits analyzed in this study spent an estimated total of $416.4 million on functional expenses in 2012, including employee compensations, payroll tax, professional fundraising, program service, management, and general expenses. (Figure 2 shows the breakdown of the 248 organizations that filed Form 990.⁹) Individual expenditures among these organizations vary widely however. Nearly half of the non-profits are small-scale organizations that reported or were estimated to spend $30,000 or less; together, this group made up less than 1 percent of the aggregate non-profit expenditures in the County in 2012. In contrast, non-profits located in the top quartile spent more than $100,000 per organization.

Table 2 below lists the top 10 non-profit organizations ranked by their total functional expenses. This group accounted for 64.2 percent of the aggregate expenditures made by all non-profits included in this study. Although the recent economic recession officially ended in June 2009, some non-profit organizations, such as the Food Bank Coalition, are facing increasingly tight budgets. However, compared to two years ago, many non-profits have seen a positive turnaround in funding and scaled up their expenditures.

It is important to note, as indicated by this study’s survey responses, that many San Luis Obispo County non-profits have spent most or all of their budgets in the local economy. Among the 69 survey participants who provided an estimate of their organization’s percentage of local spending, 57 answered above 50 percent and 29 answered above 90 percent.

---

⁹Only 149 of these organizations reported positive payrolls.
Table 2: Top 10 Organizations Ranked by Total Functional Expenses Filed in 2012

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Total Functional Expenses ($ Mil)</th>
<th>Percent Change From 2 Years Ago</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cal Poly Corporation</td>
<td>$64.9</td>
<td>-0.9%</td>
</tr>
<tr>
<td>Community Health Centers Of The Central Coast Inc</td>
<td>$59.4</td>
<td>29.8%</td>
</tr>
<tr>
<td>Community Action Partnership Of San Luis Obispo County Inc</td>
<td>$52.9*</td>
<td>n.a.</td>
</tr>
<tr>
<td>California Polytechnic State University Foundation</td>
<td>$18.8</td>
<td>15.1%</td>
</tr>
<tr>
<td>Wilshire Health And Community Services Inc</td>
<td>$14.3</td>
<td>-0.5%</td>
</tr>
<tr>
<td>Hospice Partners Inc</td>
<td>$13.2</td>
<td>26.4%</td>
</tr>
<tr>
<td>Hind Foundation</td>
<td>$11.8*</td>
<td>n.a.</td>
</tr>
<tr>
<td>Associated Students Inc</td>
<td>$11.5</td>
<td>-5.1%</td>
</tr>
<tr>
<td>Family Care Network Inc</td>
<td>$11.3</td>
<td>31.5%</td>
</tr>
<tr>
<td>Food Bank Coalition Of San Luis Obispo County</td>
<td>$9.1</td>
<td>-11.0%</td>
</tr>
</tbody>
</table>

Note: Numbers are rounded.
Source: I.R.S.; Expenses with asterisks are estimated by Beacon Economics

Output

Beacon Economics estimates that the total amount of economic output generated by San Luis Obispo County non-profits in 2012 was $798.8 million. This total includes $430.3 million in direct spending, as well as $368.5 million in secondary spending, of which $182.6 million comes from indirect effects through economic activity from suppliers of non-profits, and $185.9 million comes from induced effects through economic activity from, among others, workers whose wages and earnings increased as a result of the total expenditures made by non-profits. Secondary spending—46.1 percent of total output—was nearly as large as direct spending. Overall, the non-profits included in this study are generating economic activity in San Luis Obispo County well beyond their own expenditures. Moreover, the $798.8 million of total impact on output that comes from non-profits is sizable within the County economy. It is equivalent to approximately 7.3 percent of San Luis Obispo County’s gross domestic product (GDP),¹⁰ a slightly larger share than both the durable goods and finance sectors. A substantial amount of the demand for goods and services at businesses within County limits is attributable to the operations of non-profits.

¹⁰According to the U.S. Bureau of Economic Analysis, 2011 GDP in the San Luis Obispo-Paso Robles metro area, which includes all of San Luis Obispo County, was $11,010 million.
Employment

The expenditures of San Luis Obispo County non-profits in the local economy are not only good for area businesses. They are also good for residents. Based on Beacon Economics’ analysis of non-profit spending, non-profit operations are estimated to have supported a total of 10,480 full-time equivalent jobs in 2012, or 10 percent of all jobs within the County that year.¹¹ Of these jobs, 7,590 are supported by direct expenditures of San Luis Obispo County non-profits, while 2,900 jobs (27.6 percent) are supported by secondary economic activity. This secondary activity includes 1,470 jobs through indirect effects, hiring by the businesses that supply goods and services to non-profits, and 1,430 jobs through induced effects, hiring supported by the spending that results from an increase in take-home pay earned by employees of non-profits and their suppliers.

Labor Income

On top of supporting over 10,000 jobs in San Luis Obispo County, non-profit operations generated $264.3 million in wages and earnings directly, and $114.8 million (30.3 percent) in wages and earnings through indirect and induced effects. This equals a total impact of $379.1 million, or about 9 percent of the County’s total 2012 payroll.¹² On average, this translates into $36,160 worth of labor income per job supported by non-profit operations. However, due to the nature of non-profit organizations, their average labor income of $34,830 per job is $4,800 lower than the average labor income per job generated by the secondary effects.

¹¹According to the Quarterly Census of Employment and Wages (QCEW) released by the California Economic Development Department, San Luis Obispo County had a monthly average of 105,076 private and public sector jobs in 2012.
¹²QCEW reports a total payroll of $4.18 billion for San Luis Obispo County in 2012.
Tax Revenue

Although San Luis Obispo County non-profits are tax-exempt, their operations in 2012 still contributed $7.7 million worth of state and local tax revenues. These revenues were generated via a number of different channels, such as income tax on wages and earnings and sales tax on purchases. Moreover, the suppliers of goods and services to non-profits contributed an additional $10.4 million to state and local government coffers, while induced economic activities injected another $16 million. In total, spending by San Luis Obispo based non-profits generated a total of $34 million in state and local tax revenues in 2012.

<table>
<thead>
<tr>
<th>Impact of SLO-Based Non-Profits Operations on State and Local Tax Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact</td>
</tr>
<tr>
<td>Direct Effect</td>
</tr>
<tr>
<td>Indirect Effect</td>
</tr>
<tr>
<td>Induced Effect</td>
</tr>
<tr>
<td>Total Effect</td>
</tr>
</tbody>
</table>

Note: Numbers are rounded.
Source: IMPLAN; Calculations by Beacon Economics

Social Impact of SLO-Based Non-Profits

In addition to generating a positive impact on the regional economy through their spending, San Luis Obispo County non-profits also have a very deep social impact on the local community and local residents. In general, non-profit organizations fill a void in the economy by providing goods and services that businesses, for financial reasons, are unable to offer themselves, but that are nonetheless important for business activity. These include a healthier, more educated workforce, cleaner cities, and cultural and recreational attractions that draw new residents. The positive social impacts of non-profits have a reverberating effect on the business climate of the state.

Most importantly, many small-scale non-profits do not have the budget to support large full-time staffs. Instead, they rely on volunteers to help deliver services and goods to people in need. In this sense, an expenditure-based impact study would tend to underemphasize the actual impact and contribution of these non-profits because the value of time spent by the volunteers is not reported in the I.R.S. Form 990 or 990-EZ. In Beacon Economics’ current study, of the 70 survey participants who reported the number of workers they employ, 61 had less than 20 full-time equivalent employees. However, this group had an average 56 volunteers per full-time employee, and each volunteer worked about 50.6 hours in 2012, for a combined total of 627,274 volunteer hours. In comparison, the nine larger organizations had an average three volunteers per full-time employee, and each volunteer worked approximately 45.8 hours last year, for a combined total of 347,076 volunteer hours. A total of 66 surveyed non-profits estimated that, thanks to the joint efforts of their employees and
their volunteers, they reached more than a half a million individuals last year through direct program activities and assistance.

And the benefits are reciprocal. Research has demonstrated that employees value workplace volunteerism. Those who are engaged in volunteer work are more likely to feel satisfied with and loyal to their employers, increasing their work commitment and productivity.\(^\text{13}\) By providing ample volunteering opportunities, San Luis Obispo County non-profits help local businesses realize unconventional economic values that are difficult to capture in an expenditure-based economic impact analysis.

Additionally, many non-profits support causes that may not generate immediate economic values but have long-term benefits for the community as a whole. For example, through its early literacy program, the Community Foundation of San Luis Obispo County helps children from low-income and non-English speaking families gain literacy skills and become school-ready. This does not only help make the children more likely to succeed in school, but it improves their future employability and supplies local business with a better-educated workforce.

In other cases, non-profits also act as an important intermediary to help reallocate valuable resources more efficiently. For example, through its GleanSLO Program, the Food Bank Coalition of San Luis Obispo County rescued 50 tons of fresh produce and delivered it to low-income residents. And last but not the least, because many non-profits serve people who live at the margins of society, the assistance these non-profits provide can be life-changing for individuals and their families. For instance, the South County Youth Coalition reported that they helped a single mother and her children who escaped domestic violence find housing, provided them with household necessities including food, and helped enroll the children in school.

**Promoting Long-Term Benefits of Education:**
**The Community Foundation San Luis Obispo County**

Last year, 425 families participated in the Community Foundation’s early literacy program, which helps children from low-income and non-native English speaking families gain literacy skills and become school-ready. Research shows that children who read at a third-grade level in the third grade have a higher probability of finishing high school.

**Conclusion**

Generating nearly $800 million in economic output in San Luis Obispo County in 2012 alone, local non-profits have a substantial impact on economic activity in the County. Non-profit operations support an estimated 10,480 jobs and generate $379.1 million in labor income for workers in the County. Although non-profits are tax-exempt, their operations still produce $34 million in combined tax revenues for local and state government budgets in the form of sales tax, individual income tax, and other taxes. In fact, these estimates are, by necessity, conservative. In the case of non-profits, an expenditure-based analytical approach does not take into account the market value of volunteering work, which is of particular importance for small-scale non-profits that do not have the budget to hire a large number of full-time employees. The analysis also does not include the economic value of workplace volunteerism, which is

greatly facilitated by local non-profits. Therefore, the exact economic impacts of San Luis Obispo County non-profits may be significantly higher.

Just as important as their economic impacts, the non-profits of San Luis Obispo County continue to generate social impacts through the goods, services, and assistance provided to the local community and beyond. These non-profits not only serve a key role in the region’s economic activity, but they also seek to improve the quality of life for County residents and promote their overall well-being, regardless of age and income. This is especially important for common causes with long-term economic and social benefits that do not generate immediate economic values.
Appendix

A. Methodology

The IMPLAN modeling system combines the U.S. Bureau of Economic Analysis' Input-Output Benchmarks with other data to construct quantitative models of trade flow relationships between businesses, and between businesses and final consumers. From this data, researchers can examine the effects of a change in one or several economic activities to predict its effect on a specific regional economy (impact analysis). The IMPLAN input-output accounts capture all monetary market transactions for consumption in a given time period. The IMPLAN input-output accounts are based on industry survey data collected periodically by the U.S. Bureau of Economic Analysis and follow a balanced account format recommended by the United Nations.

In Beacon Economics' analysis, IMPLAN's Regional Economic Accounts and the Social Accounting Matrices were used to construct region-level multipliers that describe the response of the relevant regional economy to a change in demand or production as a result of the activities and expenditures of the non-profits included in the study. Each industry that produces goods or services generates demand for other goods and services, and this demand is multiplied through a particular economy until it dissipates through "leakage" to economies outside the specified area. IMPLAN models discern and calculate leakage from local, regional, and state economic areas based on workforce configuration, the inputs required by specific types of businesses, and the availability of both inputs in the economic area. Consequently, economic impacts that accrue to other regions or states as a consequence of a change in demand are not counted as impacts within the economic area.

The model accounts for substitution and displacement effects by deflating industry-specific multipliers to levels well below those recommended by the U.S. Bureau of Economic Analysis. In addition, multipliers are applied only to personal disposable income to obtain a more realistic estimate of the multiplier effects from increased demand. Importantly, IMPLAN's Regional Economic Accounts exclude imports to an economic area so the calculation of economic impacts identifies only those impacts specific to the economic impact area, in this case San Luis Obispo County. IMPLAN calculates this distinction by applying the area's economic characteristics described in terms of actual trade flows within the area.

Impact studies operate under the basic assumption that any increase in spending has three effects: First, there is a direct effect on that industry itself.¹⁴ In the case of non-profits, increased expenditures on program services could translate into a greater population served. Second, there is a chain of indirect effects on all the industries whose outputs are used by the industry under observation. Take animal shelters, for example. Here, the indirect effects would include the demand and employment that is stimulated at firms that provide goods and services to this type of organization, such as pet food providers. Third, there are induced effects that arise when employment increases and household spending patterns are expanded. These induced effects occur because both non-profits and their suppliers pay out wages to their employees, and those wages are then spent back in the local economy on household items such as food, gas, cars, and housing. These expenditures generate additional demand/output and associated wages that will then be spent back in the local economy generating additional secondary effects.

There are several aspects to the overall economic impact. First, there is an effect on value added—the take-home pay of all the people affected will be supplemented by that amount. The secondary and tertiary effects of the industry on the rest of the local economy are not very large. Second are the employment effects, with some jobs created in the industry itself and the others spread throughout the regional economy. Third is the output effect, where the differ-

¹⁴Beacon Economics assumes that all the non-profits included in this study belong to the industry "Grantmaking, giving, and social advocacy organizations" as classified by IMPLAN.
ence between value added and output is that the former concentrates on individuals’ paychecks, whereas the latter includes the costs of intermediate inputs. National income accounting avoids double counting by excluding the costs of intermediate inputs.

It is also important to note that expenditures made within the same sector in different regions can generate different economic impacts. If the sector does not import many materials from other regions (e.g., outside San Luis Obispo County), then its multiplier effect on the local economy will be high. In essence, some of the spending in the local economy may “leak out” to other counties and states. This is why multipliers, even for the same industry, can fluctuate from region to region, depending on local availability of inputs to that production process. If inputs need to be more heavily imported into one region than into another region due to the structure of that region’s economy, then a similar expenditure made in this sector would generate smaller overall economic impacts, as a larger portion of it made into the local sector will result in a greater degree of economic activity leaking outside the region.

In sum, Beacon Economics’ analysis using input-output accounts is based on three important assumptions. First, there are constant returns to scale. This means that a 10 percent cut in spending will be ten times as severe—across every sector in the economy—as a one percent cut. Second, there are no supply constraints. This means that any marginal increase in output can be produced without having to worry about bottlenecks in labor markets, commodity markets, or necessary imports. This assumption is quite realistic in a free-market economy like California’s where there is some unemployment. It is even more realistic in times of high unemployment. In the current labor market, there is still a significant portion of under- or un-utilized resources across the state. Third, the flow of commodities between industries is fixed. This means that it is not possible to substitute in the short-run the many different inputs that go into the target industry.

Thus, Beacon Economics analysis covers the primary areas of economic impact that will accrue due to expenditures made by non-profits located in San Luis Obispo County. First, the direct employment, output, and value added effects for each of the three areas after accounting for "leakage" out of each area are analyzed. Second, estimates are made of the indirect effects on all the industries whose outputs are used by the proposed investments as well as the induced effects arising when employment increases and household spending patterns are expanded.

B. List of Non-profits Considered in the Economic Impact Study

1 Dream Foundation Inc (San Luis Obispo)
5-Cities Community Service Foundation (Grover Beach)
5 Cities Homeless Coalition (Grover Beach)
9-11 Americanthunder* (San Luis Obispo)
A Hand Up Transitional Living Program Inc* (Los Osos)
ASH Building Blocks (Atascadero)
A Z Sinsheimer Family Memory Fund* (San Luis Obispo)
Aaron’s Boys Home (Atascadero)
Access Foundation* (San Luis Obispo)
Achievement House Inc (Paso Robles)
Action for Animals Rights (Atascadero)
Adelaida Historical Foundation* (Paso Robles)
Adventure Media Inc* (Los Osos)
Alice Cozzi Heritage Language Foundation* (San Luis Obispo)
Alliance Equine Rescue and Youth Educational Development Foundation (Paso Robles)

Alliance for Alternative Agriculture* (San Luis Obispo)
Alliance for Nuclear Responsibility (San Luis Obispo)
Alliance for Nuclear Responsibility Legal Fund* (San Luis Obispo)
Alliance for Retail Energy Markets (Oceano)
Allied Arts Association of Cambria (Cambria)
Altrusa International Foundation Inc* (Arroyo Grande)
Altrusa International Inc* (Pismo Beach)
Altrusa International Inc* (San Luis Obispo)
Amazing Surf Adventures* (San Luis Obispo)
America Appreciates Inc* (San Luis Obispo)
American Association of University Women Inc* (Los Osos)
American Association of University Women Inc* (Paso Robles)
American Association of University Women* (Arroyo Grande)
American Association of University Women* (Atascadero)
American Association of University Women* (San Luis Obispo)
American Backflow Prevention Association* (Creston)
American Biodiesel Buyers Club* (Morro Bay)
Animal Shelter Adoption Partners Inc* (Arroyo Grande)
Animals in Need Fund* (Nipomo)
Anodos Foundation* (Cambria)
Apela Foundation* (Grover Beach)
Arroyo Grande Community Hospital Foundation (Arroyo Grande)
Arroyo Grande Hall Association* (Arroyo Grande)
Arroyo Grande in Bloom Inc (Arroyo Grande)
Arroyo Grande Valley Babe Ruth League* (Arroyo Grande)
Arthur E. Guedel Memorial Anesthesia Center (Nipomo)
Artistic Resources Team (Templeton)
Associated Students Inc (San Luis Obispo)
Assure a Cure Inc* (Atascadero)
Atascadero Art Association* (Atascadero)
Atascadero Christian Home (Atascadero)
Atascadero Colony Days Committee* (Atascadero)
Atascadero Community Band* (Atascadero)
Atascadero Community Services Foundation Inc* (Atascadero)
Atascadero Education Foundation Inc* (Atascadero)
Atascadero Girls Softball (Atascadero)
Atascadero Greyhound Foundation (Atascadero)
Atascadero Historical Society* (Atascadero)
Atascadero Land Preservation Society* (Atascadero)
Atascadero Loaves and Fishes (Atascadero)
Atascadero Main Street Inc* (Atascadero)
Atascadero Native Tree Association* (Atascadero)
Atascadero Performing Arts Center Committee* (Atascadero)
Atascadero Pre School Association* (Atascadero)
Atascadero State Hospital Canteen (Atascadero)
Atascadero Veterans Memorial foundation (Atascadero)
Atascadero Youth Soccer Association Inc (Atascadero)
Augustine Foundation* (Paso Robles)
Australian Shepherd Health and Genetics Institute Inc (Grover Beach)
Avalon Foundation* (Templeton)
Avila Beach Civic Association (Avila Beach)
Avila Beach Community Foundation (Avila Beach)
Avila Beach Junior Lifeguard Program (Grover Beach)
Avila Beach Sea Life Center (Avila Beach)
Baker Childrens Foundation Inc* (Paso Robles)
Ballet Theatre San Luis Obispo (San Luis Obispo)
Basin Street Regulars -Central Coast Hot Jazz Society* (Pismo Beach)
Bay Area Youth Football League Morro Bay Chapter (Los Osos)
Bay Foundation of Morro Bay California San Luis Obispo County (Morro Bay)
Bay-Osos Kiwanis Foundation (Los Osos)
Bellevue Santa Fe Charter School Inc (San Luis Obispo)
Beth David Counseling Services Incorporated* (San Luis Obispo)
Big Brothers-Big Sisters of San Luis Obispo County (San Luis Obispo)
Big Heart Animal Therapy* (Templeton)
Black Brant Group* (Morro Bay)
Blakeslee Family Foundation Inc* (San Luis Obispo)
Blessed Creatures Inc* (Atascadero)
Bluegrass Music Society of the Central Coast (Grover Beach)
Boy Scout Building Trusteeship* (Paso Robles)
Boys & Girls Club of South San Luis Obispo County (Oceano)
Brush Poppers of the Central CoastInc (Arroyo Grande)
CRTA Division 86 Scholarship Committee* (Atascadero)
C-Court Inc (San Luis Obispo)
Cal Poly Corporation (San Luis Obispo)
Cal Poly Housing Corporation* (San Luis Obispo)
California Environmental Education Foundation* (Los Osos)
California Federation of Women’s Club* (Morro Bay)
California Garden and Landscape History Society* (Atascadero)
California Law Enforcement Historical Society* (Pismo Beach)
California Mid State Heritage Foundation Inc (Paso Robles)
California Polytechnic State University Foundation (San Luis Obispo)
California Public Radio* (San Luis Obispo)
California Reform Foundation* (San Luis Obispo)
California Reform Institute* (San Luis Obispo)
California Rescue Dog Association (Pismo Beach)
California Society for the Advancement of Behavior Analysis I* (Morro Bay)
California State Foster Parents Association* (Atascadero)
Cambria Adult Resources Education & Support (Cambria)
Cambria Community Council Inc (Cambria)
Cambria Connection (Cambria)
Cambria Education Foundation* (Cambria)
Cambria Forest Committee* (Cambria)
Cambria Historical Society (Cambria)
Cambria Land Conservancy* (Cambria)
Cambria Rotary Sunrise Centennial* (San Luis Obispo)
Cambria Youth Athletic Association Inc* (Cambria)
Cambrias Anonymous Neighbors (Cambria)
Camp Erutan (Los Osos)
Camp Fire Usa (Arroyo Grande)
Camp Ocean Pines Inc (Cambria)
Camp Roberts Historical Museumfoundation (Camp Roberts)
Cancer Well Fit Inc* (Avila Beach)
Canzona Women’s Ensemble* (San Luis Obispo)
Carol and Warren Sinsheimer Foundation Inc* (San Luis Obispo)
Carol and Albert Gazin* (San Luis Obispo)
Caroline Huetter Foundation* (Paso Robles)
Casa Solana Inc (Grover Beach)
Castleman’s Awareness & Research Effort (Paso Robles)
Cayucos Art Association Vets Hall Cayucos Dr & Ocean Front* (Cayucos)
Cayucos Community Art Gallery Inc* (Cayucos)
Cayucos Educational Foundation (Cayucos)
Cayucos Land Conservancy (Cayucos)
Cayucos Lions Foundation Inc* (Cayucos)
Cayucos Senior Citizens Club (Cayucos)
CDF SLO County Fire Fighters Benevolent Association (Paso Robles)
Central Coast of Pug Rescue (Grover Beach)
Center for Reuniting Families (Templeton)
Center for River Restoration and Research* (San Luis Obispo)
Central Coast Ag Network Inc (San Luis Obispo)
Central Coast Autism Spectrum Center (San Luis Obispo)
Central Coast Central office intergroup* (San Luis Obispo)
Central Coast Children’s Choir (San Luis Obispo)
Central Coast Clergy and Laity for Justice* (Arroyo Grande)
Central Coast Dance Foundation Inc* (Paso Robles)
Central Coast Economic forecast* (San Luis Obispo)
Central Coast Explorer Competition Inc (Paso Robles)
Central Coast Firearms Education Foundation* (Los Osos)
Central Coast Firefighters Charity Golf Tournament* (Pismo Beach)
Central Coast Fisheries Conservation Coalition* (San Luis Obispo)
Central Coast Funds for Children (San Luis Obispo)
Central Coast Kidney Foundation* (San Luis Obispo)
Central Coast Link* (Atascadero)
Central Coast Maritime Museum Association (Morro Bay)
Central Coast Married for Keeps* (Arroyo Grande)
Central Coast Memorial Society* (San Luis Obispo)
Central Coast Neighbors Foundation Inc* (Morro Bay)
Central Coast Parkinson Support Group (Arroyo Grande)
Central Coast Performing Arts Center Commission (San Luis Obispo)
Central Coast Resource Conservation & Development Council* (Morro Bay)
Central Coast Salmon Enhancement (Arroyo Grande)
Central Coast Seniors* (Oceano)
Central Coast Shakespeare Festival* (San Luis Obispo)
Central Coast State Parks Association* (Morro Bay)
Central Coast Substitute Care for Children* (San Luis Obispo)
Central Coast Veterans Memorial Museum Inc* (San Luis Obispo)
Central Coast Village Center Inc (San Luis Obispo)
Central Coast Watercolor Society Inc* (Grover Beach)
Central Coast Wildlife Rehabilitation Guild (Morro Bay)
Central Coast Women for Fisheries Inc (Morro Bay)
Central Coast Zoo Society (Atascadero)
Central Rehabilitation Clinic Inc (San Luis Obispo)
Chapel Court Housing Corporation (San Luis Obispo)
Children’s Museum at the Paso Robles Volunteer Firehouse (Paso Robles)
Children’s Resource Network of the Central Coast* (Pismo Beach)
Chinese Garden SLO* (San Luis Obispo)
Chris Jespersen Memorial Society for Children in Special Education (San Luis Obispo)
Cinco De Mayo Scholarship Committee De Paso Robles* (Paso Robles)
Circe 02* (Nipomo)
Citizens Scholarship Foundation* (Paso Robles)
City of Pismo Beach Public Facilities Corporation (Pismo Beach)
Civic Ballet of San Luis Obispo Inc (San Luis Obispo)
Clark-Ovitt Foundation Inc* (San Miguel)
Club Senor De La Lampara* (Oceano)
Coastal Alliance On Plant Expansion* (Morro Bay)
Coastal Chamber Youth Ballet Company* (Grover Beach)
Coastal Christian School (Arroyo Grande)
Common Ground Worldwide* (Morro Bay)
Community Action Partnership of San Luis Obispo County Inc* (San Luis Obispo)
Community Counseling Center of San Luis Obispo County (San Luis Obispo)
Community Health Centers Foundation Inc* (Nipomo)
Community Health Centers of the Central Coast Inc (Nipomo)
Compass Community Healthcare Programs (Grover Beach)
Court Appointed Special Advocates of San Luis Obispo County Inc (San Luis Obispo)
Creative Alternative for Learning and Living (Atascadero)
Creative Dancing Productions (Morro Bay)
Credit Power Educational Foundation Inc (Nipomo)
Creston Activities Town Center Helping Hand* (Creston)
Creston Community Assn Inc* (Creston)
Creston Women’s Club* (Creston)
Cuesta College Foundation (San Luis Obispo)
Dana Adobe Nipomo Amigos Inc (Nipomo)
Daniel E. Lewis Leaders* (Paso Robles)
De La Guerra Y Pacheco Chapter 1-5 E Clampus Vitus Inc* (San Luis Obispo)
Design Institute (San Luis Obispo)
Dinosaur Caves Preservation Society* (Pismo Beach)
Disabled American Veterans* (Oceano)
Discovery Institute for the Advancement of Science Technology* (Arroyo Grande)
Diversified intervention Group* (Morro Bay)
Donna & Robert Berg Foundation* (Paso Robles)
Duncan Group (San Luis Obispo)
Earth Day Alliance Inc* (San Luis Obispo)
Easter Island Foundation* (Los Osos)
Ecologistics Inc (San Luis Obispo)
Economic Vitality Corporation of San Luis Obispo County (San Luis Obispo)
Edna-Islay Housing Corporation (San Luis Obispo)
El Camino Art Assn Inc* (Pismo Beach)
El Camino Homeless Organization (Atascadero)
El Paso De Robles Area Historical Society (Paso Robles)
El Paso De Robles Area Pioneer Museum (Paso Robles)
Emily’s Pad Inc* (Cambria)
Emmanuel Heights Camp & Retreat Center (Creston)
Enhancement Inc (Morro Bay)
Environment in the Public Interest (San Luis Obispo)
Environmental Center of San Luis Obispo (San Luis Obispo)
Ernest Clark Iverson Foundation Inc (Nipomo)
Estero Bay Community Radio* (Morro Bay)
Estero Radio Club Inc* (Los Osos)
Estrella Warbirds Museum Inc (Paso Robles)
Everyday Financial* (Atascadero)
Fair Trade San Luis Obispo Inc (San Luis Obispo)
Family Care Network Inc (San Luis Obispo)
Family Ties (San Luis Obispo)
Farbstein Family Charitable Foundation* (San Luis Obispo)
Feline Network of the Central Coast (San Luis Obispo)
Fitzhugh Trust* (Paso Robles)
Five Cities Girls Softball Association (Arroyo Grande)
Five Cities Youth Baseball* (Pismo Beach)
Five Cities Youth Basketball League* (Shell Beach)
Five Cities Youth Football League Inc (Arroyo Grande)
Florence Macfarlane Martin Foundation* (San Luis Obispo)
Flying Samaritans (San Luis Obispo)
Food Bank Coalition of San Luis Obispo County (Paso Robles)
Fort Hope Inc (Arroyo Grande)
Foster Youth Need Education Fyne* (San Luis Obispo)
Foundation for San Luis Obispo County Public Libraries (San Luis Obispo)
Foundation for the Performing Arts Center (San Luis Obispo)
French Hospital Medical Center Foundation (San Luis Obispo)
French Hospital Volunteer Guild Inc (San Luis Obispo)
Friends of Hapitok Inc (San Luis Obispo)
Friends of Hearst Castle Monument (San Simeon)
Friends of Los Osos Library (Los Osos)
Friends of Mission San Miguel (San Miguel)
Friends of Prado Day Center (San Luis Obispo)
Friends of San Luis Obispo Botanical Garden (San Luis Obispo)
Friends of the Adobes Inc* (San Miguel)
Friends of the Arroyo Grande Library* (Arroyo Grande)
Friends of the Cambria Library (Cambria)
Friends of the Carrizo Plain A California Public Benefit Corp (Santa Margarita)
Friends of the Cayucos Library* (Cayucos)
Friends of the Creston Library* (Creston)
Friends of the Elephant Seal (Cambria)
Friends of the Fiscalini Ranch Preserve (Cambria)
Friends of the K9 Inc* (Paso Robles)
Friends of the Library at Atascadero (Atascadero)
Friends of the Morro Bay Fire Department (Morro Bay)
Friends of the Morro Bay Police Department* (Morro Bay)
Friends of the Nipomo Library (Nipomo)
Friends of the Paso Robles Public Library (Paso Robles)
Friends of the Piedras Blancas Lighthouse Lens* (Cambria)
Friends of the Santa Margarita Library* (Santa Margarita)
Futbol Project (Shell Beach)
Ganpule Family Foundation Inc* (Templeton)
Gary and Lennie Michelson Family Foundation* (San Luis Obispo)
Gatehelp Inc (San Luis Obispo)
Gay and Lesbian Alliance of the Central Coast (San Luis Obispo)
Gerald Arpino & Robert Joffrey Foundation* (Cambria)
Global Alliance for Balance and Healing Inc* (Santa Margarita)
Global Foundation for the Prevention of Blindness* (San Luis Obispo)
Go Outside With Sonny* (Arroyo Grande)
Gold Coast Library Network* (San Luis Obispo)
Good Steward* (Atascadero)
Gooney Bird Group A Non Profit Corporation* (Templeton)
Grandmothers House of San Luis Obispo County (San Luis Obispo)
Grant Funding Sponsorship Group Inc* (San Luis Obispo)
Great Expectations Inc* (Arroyo Grande)
Green Car Institute* (San Luis Obispo)
Greenspace the Cambria Land Trust (Cambria)
Grinegan Farm* (San Luis Obispo)
Grover Beach Community Library* (Grover Beach)
Habitat for Humanity International Inc (San Luis Obispo)
Hands in Nepal Inc* (Santa Margarita)
Harold J Miossi Charitable Trust* (San Luis Obispo)
Healing Hearts Homes* (Templeton)
Heaven Can Wait Inc (San Miguel)
Helping Hands of Mexico Hogar De Ninos Inc* (Arroyo Grande)
Helping Veterans in Need Inc* (Morro Bay)
Heritage Shared (San Luis Obispo)
Hind Foundation* (San Luis Obispo)
Historical Society of Morro Bay* (Morro Bay)
History Center of San Luis Obispo County (San Luis Obispo)
History Revisited (Morro Bay)
Home School Association for Military Families* (San Miguel)
Homeless Animal Rescue Team (Cambria)
Hopes Village of SLO* (Santa Margarita)
Horse Emergency Evacuation Team* (Nipomo)
Hospice of San Luis Obispo County (San Luis Obispo)
Hospice Partners Inc (San Luis Obispo)
Infant Essentials* (Cambria)
Institute for Sustainable Living* (Paso Robles)
Institute for the Study of Family Codependence (Atascadero)
Interfaith Coalition for the Homeless* (San Luis Obispo)
International Association of Lions Clubs (Atascadero)
International Association of Lions Clubs (Cayucos)
International Association of Lions Clubs (Paso Robles)
International Association of Lions Clubs (San Luis Obispo)
International Association of Lions Clubs* (Arroyo Grande)
International Association of Lions Clubs* (Nipomo)
International Association of Lions Clubs* (Pismo Beach)
International Association of Lions Clubs* (Santa Margarita)
International Association of Lions Clubs* (Shandon)
International Association of Lions Clubs* (Templeton)
Irene M. & Ralph C. Zalkan Charitable Foundation* (Pismo Beach)
Jacks Helping Hand Inc (San Luis Obispo)
Jacqualyn Palchak Cancer Fund (Pismo Beach)
Jake J. Schreibman Foundation* (Cambria)
Jc Positive Inc* (Oceano)
Jeff and Carla Cole Foundation Inc* (San Luis Obispo)
Joseph Shinoda Memorial Scholarship Foundation* (San Luis Obispo)
Joslynn Adult Recreation Center of Cambria (Cambria)
Joslynn Center Building Fund Committee* (Cambria)
Journeyman International* (Atascadero)
KCBX Inc (San Luis Obispo)
KCBXnet (San Luis Obispo)
Kelrik Productions Inc (San Luis Obispo)
Kenny Nickelson Memorial Foundation for Homeless Veterans (Nipomo)
Kentucky Ranch Foundation (Paso Robles)
Key Club International* (Paso Robles)
Kids 4 Kures Inc* (San Luis Obispo)
Kids Cancer Research Foundation (San Luis Obispo)
Kiwanis Club of Atascadero Foundation (Atascadero)
Kiwanis International Inc (Arroyo Grande)
Kiwanis International Inc (Atascadero)
Kiwanis International Inc (Los Osos)
Kiwanis International Inc (San Luis Obispo)
Kiwanis International Inc* (Arroyo Grande)
Kiwanis International Inc* (Nipomo)
Kiwanis International Inc* (Paso Robles)
Knudson Memorial Scholarship Inc* (Nipomo)
Kosch-Westerman Foundation Inc* (Pismo Beach)
Landwatch San Luis Obispo County* (Cambria)
Lasting Impressions Wilderness Training Corporation (Paso Robles)
Laureate Fund* (San Luis Obispo)
Laureate JP Foundation Inc* (San Luis Obispo)
Lauren MS Foundation* (Nipomo)
| Laurence C. Gaede Family Foundation Inc* (Avila Beach) | MOMS Club* (Atascadero) |
| League of Women Voters of San Luis Obispo* (San Luis Obispo) | MOMS Club* (Morro Bay) |
| Leap Foundation* (Arroyo Grande) | Monday Club of San Luis Obispo (San Luis Obispo) |
| Learning Ranch for Boys and Girls (Morro Bay) | Montessori World Educational Institute (Cambria) |
| Leo A. & Minta L. Brisco Foundation Tr 110194* (Arroyo Grande) | Morning Star Youth Ranch (Paso Robles) |
| Lifelong Learners of the Central Coast* (San Luis Obispo) | Morrissey Fund Inc* (Los Osos) |
| Lifestyles Recovery Center Inc* (Atascadero) | Morro Bay Art Association (Morro Bay) |
| Lifewater Inc (San Luis Obispo) | Morro Bay Beautiful* (Morro Bay) |
| Lighthouse Nonprofit Technologies* (Avila Beach) | Morro Bay Charity Bridge Club* (Cayucos) |
| Ligia Dantes Foundation Inc* (Nipomo) | Morro Bay Community Foundation Inc* (Morro Bay) |
| Little League Baseball Inc (Arroyo Grande) | Morro Bay Community Pool Foundation* (Morro Bay) |
| Little League Baseball Inc (Atascadero) | Morro Bay Fourth Inc (Morro Bay) |
| Little League Baseball Inc (Los Osos) | Morro Bay Friends of the Library (Morro Bay) |
| Little League Baseball Inc (Nipomo) | Morro Bay Harbor Festival Inc (Morro Bay) |
| Little League Baseball Inc* (Morro Bay) | Morro Bay Marine Rehabilitation Center* (Morro Bay) |
| Loaves and Fishes (Paso Robles) | Morro Bay Neighborhood Watch Association Inc* (Morro Bay) |
| Logos Broadcasting Corporation (San Luis Obispo) | Morro Bay Police Volunteers Inc* (Morro Bay) |
| Long Term Care Ombudsman Services of San Luis Obispo County (San Luis Obispo) | Morro Bay Public Art Foundation* (Morro Bay) |
| Los Osos Community Organization* (Los Osos) | Morro Bay Senior Citizens Inc (Morro Bay) |
| Los Robles Terrace Inc (San Luis Obispo) | Morro Bay White Caps* (Morro Bay) |
| Love & inspire Nations Through Compassion (Paso Robles) | Morro Bay Youth Sailing Foundation* (Morro Bay) |
| Lucia Mar Foundation for innovation (Arroyo Grande) | Morro Coast Audubon Society (Morro Bay) |
| Lucia Mar Unified School District Financing Corporation* (Arroyo Grande) | Mothers for Peace Action Committee* (San Luis Obispo) |
| Mane Prairie Sanctuary Inc* (Oceano) | Mozart Festival Association (San Luis Obispo) |
| Mankins Family Foundation* (Arroyo Grande) | Must (Paso Robles) |
| Manosophy Inc* (Los Osos) | National Assistance League (San Luis Obispo) |
| Marianne Talley Foundation Inc* (Arroyo Grande) | National Brussels Griffon Rescue Incorporated (San Luis Obispo) |
| Marie H. Lundin Memorial Test Tr Fbo Cancer Research* (Paso Robles) | National Exchange Club (San Luis Obispo) |
| Marine Corps League* (San Luis Obispo) | National Exchange Club* (Grover Beach) |
| Mariposa Community Recovery Ctr* (Nipomo) | National Exchange Club* (Paso Robles) |
| Mature Adult Day Assistance (Morro Bay) | National Society of the Daughters of the American Revolution* (Nipomo) |
| Medcorp Rehabilitation Services (Paso Robles) | National Society of the Sons of the American Revolution* (Pismo Beach) |
| Mermaid Islands Corporation* (San Luis Obispo) | NCI Affiliates Inc (Paso Robles) |
| Metabrainz Foundation Inc (San Luis Obispo) | Neighborhoods North of Foothill* (San Luis Obispo) |
| Middiff Family Foundation Inc* (Arroyo Grande) | New Century Educators (Arroyo Grande) |
| Midland Pacific Foundation* (Atascadero) | New Dawn Center for Human Growth (Cambria) |
| Millers Equestrian Center and Sanctuary (San Luis Obispo) | Nipomo Area Recreation Assoc Inc (Nipomo) |
| Miss Rodeo California Inc (Paso Robles) | Nipomo Area Senior Center* (Nipomo) |
| Mission Community Services Corporation (San Luis Obispo) | Nipomo Food Basket* (Nipomo) |
| Mission School Memorial Foundation (San Luis Obispo) | Nipomo High School Agriculture Friends* (Nipomo) |
Nipomo Incorporation Committee for education* (Nipomo)
Nipomo Native Garden* (Nipomo)
Nipomo Parks Conservancy* (Nipomo)
Nipomo Youth Softball League* (Nipomo)
Nipomos off-Leash Recreational Area Inc* (Nipomo)
North Coast Alliance (Cambria)
North County Christian School Inc (Atascadero)
North County Connection (Atascadero)
North County Dance and Performing Arts Foundation (Paso Robles)
North County Paws Cause* (Templeton)
North County Trails Association* (Atascadero)
North County Watch (Templeton)
North County Women's Resource Center (Paso Robles)
North San Luis Obispo Community Concert Association (Paso Robles)
North SLO County Boys and Girls Club Inc (Paso Robles)
Nourish America (Morro Bay)
O'Connor Way-West Foothill Area Residents Association* (San Luis Obispo)
O J Talley Foundation Inc* (Arroyo Grande)
Oak forest Apartments Inc (San Luis Obispo)
Oak Grove Housing Inc (San Luis Obispo)
Ocean View Manor Inc (San Luis Obispo)
Oceanside Gardens Inc (San Luis Obispo)
Olde Towne Nipomo Association (Nipomo)
One Cool Earth (San Luis Obispo)
Opera San Luis Obispo Inc* (San Luis Obispo)
Operation Coy* (Atascadero)
Optimist International (Arroyo Grande)
Optimist International* (Atascadero)
Optimist International* (Grover Beach)
Optimist International* (Paso Robles)
Options Family of Services (Morro Bay)
Orca Free Inc* (Arroyo Grande)
Orpha Henry Testamentary Trust* (Grover Beach)
Orphan Response* (Los Osos)
Oso Libre Por Vida Incorporated (Paso Robles)
Pacific Coast Conservation Alliance (Paso Robles)
Pacific Light Opera Theatre* (Los Osos)
Paderewski Festival* (Paso Robles)
Papillon Foundation* (Creston)
Parkfield Community Club Inc* (Parkfield)
Partners Equestrian Therapy (San Luis Obispo)
Partnership for Responsible Parenting* (Templeton)
Partnership for the Children of San Luis Obispo County (Paso Robles)
Paso Robles Acorn (Paso Robles)
Paso Robles Art Association (Paso Robles)
Paso Robles Bearcat Athletic Foundation Inc (Templeton)
Paso Robles Charter School Project (Paso Robles)
Paso Robles Fellowship Development Inc* (Paso Robles)
Paso Robles Girls Softball League Incorporated (Paso Robles)
Paso Robles Library Foundation* (Paso Robles)
Paso Robles Main Street Inc (Paso Robles)
Paso Robles Nonprofit Housing Corporation (Paso Robles)
Paso Robles Pioneer Day Committee (Paso Robles)
Paso Robles Police Activities League (Paso Robles)
Paso Robles Rotary Services Inc (Paso Robles)
Paso Robles Youth Arts Foundation* (Paso Robles)
Paso Robles Youth Baseball (Paso Robles)
Paso Robles Youth Football and Cheer Inc (Paso Robles)
Paso Robles Youth Sports Council (Paso Robles)
Pay it forward Foundation* (San Luis Obispo)
People for the Nipomo Dunes* (Nipomo)
People Kitchen* (San Luis Obispo)
Peoples Opportunity Fund* (San Luis Obispo)
Peoples Self-Help Housing Corporation (San Luis Obispo)
Pet Organization Urging Neutering Care & Education Pounce (Los Osos)
Pewter Plough Players (Cambria)
Piedras Blancas Light Station Association Inc (San Simeon)
Pinedorado Lions Foundation Inc (Cambria)
Pismo Coast Association of Realtors Charitable Foundation Inc* (Grover Beach)
Point San Luis Lighthouse Keepers (San Luis Obispo)
Professional Women's Resource (Cambria)
Project Africa Community Empowerment* (Los Osos)
Project Hope and Fairness* (San Luis Obispo)
Project Surf Camp* (Morro Bay)
Project Theatre Foundation* (Paso Robles)
Psi Chi the National Honor Society in Psychology* (San Luis Obispo)
Quota Club International Inc (San Luis Obispo)
Quota Club International Inc* (Atascadero)
Quota Club International Inc* (Morro Bay)
Quota Club International Inc* (Templeton)
Ralph A. & Marguerita A. Johnson Beneficial Trust* (Arroyo Grande)
Rancho De Los Animales for the Disabled* (Arroyo Grande)
Ranelletti Family Foundation Inc* (Grover Beach)
Rattlers Baseball Development Group Inc (San Luis Obispo)
Recreation Encourages Community Inc (Paso Robles)
Rescue Alliance of Hairless & Other Breeds Inc (San Luis Obispo)
Rev Martin Luther King Jr High School Memorial Scholarship Fund* (San Luis Obispo)
Rex Hendrix Family Foundation Inc* (Atascadero)
Rhett Bell Scholarship Foundation (Avila Beach)
Richard J. Weyhrich Charitable Tr* (San Luis Obispo)
Richard Summers Foundation for the Arts Inc* (Atascadero)
Ride Nipomo Equestrian Trails Alliance Inc* (Nipomo)
Ritas Rainbows* (San Luis Obispo)
Robert & Adele Stern Foundation* (San Luis Obispo)
Rodna P. Nye Tr* (Paso Robles)
Rossi Foundation* (San Luis Obispo)
Rotary Club of Atascadero Foundation Inc (Atascadero)
Rotary Club of Cambria Foundation Inc (Cambria)
Rotary Club of Los Osos Foundation Inc* (Los Osos)
Rotary Club of Morro Bay Foundation Inc (Morro Bay)
Rotary Club of Nipomo Foundation Inc* (Nipomo)
Rotary Club of Paso Robles Sunrise Foundation (Paso Robles)
Rotary Club of Pismo Beach-Five Cities Charitable Foundation (Pismo Beach)
Rotary Club of San Luis Obispo (San Luis Obispo)
Rotary Club of San Luis Obispo De Tolosa Charities Inc (San Luis Obispo)
Rotary Club of Templeton Foundation* (Templeton)
Rotary Community Charities Inc (San Luis Obispo)
Rotary International (Atascadero)
Rotary International (Grover Beach)
Rotary International (Grover Beach)
Rotary International (Morro Bay)
Rotary International (Nipomo)
Rotary International (Paso Robles)
Rotary International (San Luis Obispo)
Rotary International (San Luis Obispo)
Rotary International* (Arroyo Grande)
Rotary International* (Cambria)
Rotary International* (Cambria)
Rotary International* (Los Osos)
Rotary International* (Paso Robles)
Rotary International* (San Luis Obispo)
Rotary International* (San Luis Obispo)
Rotary International* (Templeton)
Roy & June Gersten Foundation* (Pismo Beach)
Rural Telemedicine Foundation Inc* (San Luis Obispo)
Rx Laughter* (Cambria)
Ryan J. Clarke CPR Fund for Schools* (Paso Robles)
SLO County Toy Run Inc (Nipomo)
Salinan Heritage Preservation Association (Atascadero)
San Luis Chamber Orchestra* (Los Osos)
San Luis Obispo ALPHA Inc (San Luis Obispo)
San Luis Obispo Blues Society Inc (San Luis Obispo)
San Luis Obispo Cal Ripken Baseball (San Luis Obispo)
San Luis Obispo Child Development Center (San Luis Obispo)
San Luis Obispo Children's Museum (San Luis Obispo)
San Luis Obispo Christian School Inc* (San Luis Obispo)
San Luis Obispo Classical Academy (San Luis Obispo)
San Luis Obispo Committee for Education On Alcoholism (San Luis Obispo)
San Luis Obispo Community Fire Safe Council Inc (San Luis Obispo)
San Luis Obispo Community Leadership Foundation (San Luis Obispo)
San Luis Obispo County Agricultural Education Committee Inc (San Luis Obispo)
San Luis Obispo County Aids Support Network (San Luis Obispo)
San Luis Obispo County Alano Club Incorporated (San Luis Obispo)
San Luis Obispo County Alliance for the Mentally Ill* (San Luis Obispo)
San Luis Obispo County Archaeological Society (San Luis Obispo)
San Luis Obispo County Arts Council (San Luis Obispo)
San Luis Obispo County Band* (Los Osos)
San Luis Obispo County Bicycle Coalition (San Luis Obispo)
San Luis Obispo County Child Abuse Prevention Council (San Luis Obispo)
San Luis Obispo County Community Foundation (San Luis Obispo)
San Luis Obispo County Emergency Communications Council* (San Luis Obispo)
San Luis Obispo County Foundation for Agricultural Awareness Inc* (San Luis Obispo)
San Luis Obispo County Genealogical Society Inc* (Atascadero)
San Luis Obispo County Housing Trust Fund (San Luis Obispo)
San Luis Obispo County Legal Alternatives Inc (San Luis Obispo)
San Luis Obispo County Sheriffs Advisory Foundation (San Luis Obispo)
Luis Obispo
San Luis Obispo County Symphony Association Incorporated (San Luis Obispo)
San Luis Obispo County Volunteers for Animals* (San Luis Obispo)
San Luis Obispo County Womenade (San Luis Obispo)
San Luis Obispo Crime Stoppers Program Inc* (San Luis Obispo)
San Luis Obispo Early Music Consortium* (Paso Robles)
San Luis Obispo Folk Music Society* (Los Osos)
San Luis Obispo Friends of the Library (San Luis Obispo)
San Luis Obispo Grass Roots II Incorporated* (San Luis Obispo)
San Luis Obispo High School Sober Grad Night Committee* (San Luis Obispo)
San Luis Obispo International Film Festival Inc (San Luis Obispo)
San Luis Obispo Law Enforcement Assistance Foundation (San Luis Obispo)
San Luis Obispo Literacy Council* (San Luis Obispo)
San Luis Obispo Little Theatre (San Luis Obispo)
San Luis Obispo Meals On Wheels Inc (San Luis Obispo)
San Luis Obispo Medical Education and Research Foundation* (San Luis Obispo)
San Luis Obispo Mothers for Peace (San Luis Obispo)
San Luis Obispo Museum of Art (San Luis Obispo)
San Luis Obispo Nonprofit Housing Corporation (San Luis Obispo)
San Luis Obispo Parks Open Space & Trails Foundation (Arroyo Grande)
San Luis Obispo Railroad Museum (San Luis Obispo)
San Luis Obispo Supported Living Inc (Grover Beach)
San Luis Obispo Vocal Arts Ensemble (San Luis Obispo)
San Luis Obispo Wind Orchestra Inc (Morro Bay)
San Luis Obispo Youth Football League* (San Luis Obispo)
San Luis Obispo Youth Sports Association (San Luis Obispo)
San Luis Vocal Arts Ensemble (San Luis Obispo)
San Miguel Resource Connection (San Miguel)
San Miguel Seniors* (San Miguel)
Santa Lucia Rockhounds* (Paso Robles)
Santa Lucia School (Templeton)
Santa Margarita Historical Society* (Santa Margarita)
Santa Maria Youth Football League (Nipomo)
Santa Monica Mountains & Seashore Foundation* (Cambria)
Save Americas Children Movement of Love* (Morro Bay)
Scaife Scholarship Alumni Association Inc* (Arroyo Grande)
Scenic Coast Foundation Inc (Morro Bay)
Scholarship & Loan Committee of the Amer Assoc of Univ Women’s* (San Luis Obispo)
Scholarship Assistance for Empowerment-San Luis Obispo (San Luis Obispo)
Scholarship Committee of the American Assoc of University Women* (Arroyo Grande)
Scholarship Memorials & Honors Comm Retired Teachers San Luis Obispo* (Morro Bay)
Schoolhouse Lane Apartments Inc (San Luis Obispo)
Second Chance at Love for Dogs* (Templeton)
Seeds of Hope International Partnerships Inc* (San Luis Obispo)
Senior Citizens United Inc* (Atascadero)
Senior Nutrition Program (San Luis Obispo)
Senior Volunteer Services (San Luis Obispo)
Seva Fund Foundation Inc* (Morro Bay)
Sexual Assault Recovery and Prevention Center of Slo County (Paso Robles)
Sexual Assault Victim Education Inc* (San Luis Obispo)
Sharon Leigh Cancer Organization Inc* (Arroyo Grande)
Shine Some Light Inc* (Avila Beach)
Sierra Vista Hospital Volunteer Auxiliary (San Luis Obispo)
SLO Girls Softball Association* (San Luis Obispo)
SLO Green Build Inc (San Luis Obispo)
SLO Jazz Festival Inc* (Shell Beach)
SLO Noor Foundation A Non-Profit Corporation (San Luis Obispo)
SLO Ride Cyclery* (Paso Robles)
SLO-Span Org* (Morro Bay)
Slow Food USA Inc* (Arroyo Grande)
Small Wilderness Area Preserves (Los Osos)
Smile Housing Corporation (Morro Bay)
Sociedad Funeraria Local (Nipomo)
Society Group A Non Profit Corporation (San Luis Obispo)
Son Care Foundation* (San Luis Obispo)
Sopa Competition Group* (Arroyo Grande)
Sophidion Foundation* (Cambria)
Soroptimist International of the Americas Inc (San Luis Obispo)
South Bay Community Center (Los Osos)
South Bay Community Pool Association* (Los Osos)
South Bay Improvement Association* (San Luis Obispo)
South Bay Seniors People Helping People Organization* (Los Osos)
South County Alano Club Inc* (Arroyo Grande)
South County Education Foundation (Arroyo Grande)
South County Family Educational and Cultural Center (Grover Beach)
South County Historical Society (Arroyo Grande)
South County Peoples Kitchen* (Arroyo Grande)
South County Performing Arts Association Inc (Arroyo Grande)
South County Performing Arts Building Foundation (Arroyo Grande)
South County Youth Coalition Inc (Arroyo Grande)
Southwest Section of the Ninety-Nines Inc* (Los Osos)
Sparks Aviation Foundation* (San Luis Obispo)
Spokes (San Luis Obispo)
State of California Grandmothers Club Inc (Arroyo Grande)
State of California Grandmothers Club Inc* (Arroyo Grande)
Stephen A. Furbacher Charitable Trust* (Paso Robles)
Studios On the Park Inc (Paso Robles)
Studt Foundation* (Cambria)
Sunny Acres Inc (San Luis Obispo)
Sustained Excellence Alliance Corp (San Luis Obispo)
Sweet Adelines International* (San Luis Obispo)
Sweet Adelines International* (Templeton)
Symphony of the Vines* (Atascadero)
Takken Family Charitable Foundation* (San Luis Obispo)
Templeton Community Library Association (Templeton)
Templeton CSD Parks and Recreation Corporation* (Templeton)
Templeton Educational Foundation (Templeton)
Templeton High School Booker Bros Scholarship (Templeton)
Templeton Historical Museum Society (Templeton)
Templeton Women's Civic Club (Templeton)
Templeton Youth Football League (Templeton)
Terra Foundation* (San Luis Obispo)
The Land Conservancy of San Luis Obispo County (San Luis Obispo)
The Lioness Club of Cayucos California* (Cayucos)
The Nature Corps (Templeton)
The United States Pony Clubs Inc* (Paso Robles)
Threeb Community Innovations* (Atascadero)
Tiffany Ranch Association* (Arroyo Grande)
Toastmasters International* (Arroyo Grande)
Toastmasters International* (Arroyo Grande)
Toastmasters International* (Arroyo Grande)
Toastmasters International* (Atascadero)
Toastmasters International* (Cambria)
Toastmasters International* (Paso Robles)
Toastmasters International* (San Luis Obispo)
Toastmasters International* (San Luis Obispo)
Tops Club Inc* (Nipomo)
Touchinghearts (Arroyo Grande)
Toy Bank of Greater Paso Robles Inc* (Paso Robles)
Transitional Food and Shelter Inc (Paso Robles)
Transitions - Mental Health Association (San Luis Obispo)
Tree Guild of Arroyo Grande Inc* (Arroyo Grande)
Tree of Life A Crisis Pregnancy Center (Atascadero)
Tress for Success* (Paso Robles)
Tri-County Dermatology Society* (San Luis Obispo)
Turtle and Tortoise Rescue of Arroyo Grande* (Arroyo Grande)
Twin Cities Community Hospital Volunteers (Templeton)
Unicorn Research Foundation* (Cayucos)
Union Pacific Historical Society (San Luis Obispo)
United Cerebral Palsy of San Luis Obispo County (San Luis Obispo)
United Way of San Luis Obispo County (San Luis Obispo)
University Women of Cambría* (Cambria)
USGBC-C4 Calfiornia Central Coast Chapter* (San Luis Obispo)
Valentine Court II Inc (San Luis Obispo)
Valentine Court III Inc (San Luis Obispo)
Valentine Court Inc (San Luis Obispo)
Vance D Rodgers and Virginia Rodgers Foundation* (San Luis Obispo)
Vintage Bicycle Association of California* (Grover Beach)
Viridian Foundation* (Los Osos)
Vision Unida* (San Luis Obispo)
Vitamin D Council (San Luis Obispo)
Volunteer Doctors of the World Inc* (San Luis Obispo)
Wagons Across America* (Paso Robles)
We Share Foundation (Morro Bay)
We Share Foundation* (Atascadero)
Wei-Tuo Foundation* (Nipomo)
Well Spring Children's Center (Los Osos)
Wellness Community - California Central Coast (Paso Robles)
Wellness Kitchen and Resource Center* (Templeton)
Whales Cave Conservancy* (Grover Beach)
Widowed Persons Association of California Inc* (Arroyo Grande)
Willard E. Bartel Foundation* (Templeton)
Wilshire Community Services (San Luis Obispo)
Wilshire Health and Community Services Inc (San Luis Obispo)
Wine Country Equine Boarding and Sanctuary Inc* (Arroyo Grande)
Wine for Water Inc* (San Luis Obispo)
Wolf Hybrid Adoption & Rescue* (Paso Robles)
Women's Community Center of San Luis Obispo County (Paso Robles)
Women's Community Club of Oceano* (Oceano)
Women's Shelter Endowment Tr* (San Luis Obispo)
Women's Shelter Program Inc of San Luis Obispo County* (San Luis Obispo)
Woods Humane Society Inc (San Luis Obispo)
Yak Tityu Tityu Yak Tilihni Northern Chumash Cultural
Preserv* (San Luis Obispo)
Young Men's Christian Association San Luis Obispo (San Luis Obispo)
Youth Development Foundation* (San Luis Obispo)
Youth Soccer Association of the Central Coast* (San Luis Obispo)
Zoo to You Wildlife Education (Paso Robles)

Note: * denotes the non-profits whose total expenditures were not reported in the I.R.S. data and estimated by Beacon Economics.

C. Survey Questionnaire

(begins on next page)
San Luis Obispo County Non-Profit Impact Survey 2013

1. What is the name of your organization?

2. Where is your organization's primary office location?
   Address
   Zip code

3. What is your name and your position within the organization?
   Name
   Position

4. Please provide us with your office contact information:
   Work email
   Work phone number

5. Which category best describes the primary purpose of your non-profit organization?
   - Animal Care
   - Arts, Culture, & Humanities
   - Education
   - Environment
   - Faith-based
   - Health
   - Human Services
   - Mutual Membership Benefit
   - Public/Societal Benefit
   - Other (please specify)
San Luis Obispo County Non-Profit Impact Survey 2013

6. For the primary category indicated above, which of the following best describes the service provided by your non-profit organization?

- Dissemination of information
- Grant making or funding
- Provision of direct services to individuals
- Provision of services on a community-wide basis
- Other (please specify)

7. Which category best describes the secondary purpose of your non-profit organization?

- Animal Care
- Arts, Culture, & Humanities
- Education
- Environment
- Faith-based
- Health
- Human Services
- Mutual Membership Benefit
- Public/Societal Benefit
- No Secondary Purpose
- Other (please specify)

8. For the secondary category indicated above, which of the following best describes the service provided by your non-profit organization?

- Dissemination of information
- Grant making or funding
- Provision of direct services to individuals
- Provision of services on a community-wide basis
- No secondary purpose indicated above
- Other (please specify)
9. What were your organization’s total revenues last year (Part 1, Line 12 of IRS Form 990)?
(Please use only whole numbers without symbols.)

<table>
<thead>
<tr>
<th>Total Revenues ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

10. Please estimate the percentage of your organization’s revenue from last year that comes from sources within San Luis Obispo County (Please use only whole numbers without symbols):

<table>
<thead>
<tr>
<th>Revenue from within San Luis Obispo County (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

11. What were your organization’s total expenses last year (Part 1, Line 18 of IRS Form 990)? (Please use only whole numbers without symbols.)

<table>
<thead>
<tr>
<th>Total Expenses ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

12. Please estimate the percentage of your expenditures that were paid to organizations, firms, or individuals within San Luis Obispo County (including salaries): (Please use only whole numbers without symbols.)

<table>
<thead>
<tr>
<th>Expenditures within San Luis Obispo County (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

13. How many of your organization’s full-time equivalent employees live in San Luis Obispo County?

<table>
<thead>
<tr>
<th>Number of employees</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

14. What is the total amount of salaries and wages your organization paid to these employees last year? (Please use only whole numbers without symbols.)

<table>
<thead>
<tr>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

15. How many of your organization’s full-time equivalent employees live outside San Luis Obispo County?

<table>
<thead>
<tr>
<th>Number of employees</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

16. What is the total amount of salaries and wages your organization paid to these employees last year? (Please use only whole numbers without symbols.)

<table>
<thead>
<tr>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

17. How many of your organization’s employees earned more than $100,000 in income last year?

<table>
<thead>
<tr>
<th>Number of employees</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>
For the following questions, please use only whole numbers rounded to the nearest dollar or percent. Please omit any commas, periods, or other symbols.

18. What was the total cost of construction/capital expenses for your organization last year? (Please use only whole numbers without symbols.)

$ __________

19. Please estimate the percentage of your organization’s construction/capital expenditures that were paid to firms or suppliers in San Luis Obispo County (Please use only whole numbers without symbols):

Expenditures (%) __________

5. San Luis Obispo County Non-Profit Impact Survey 2013

20. About how much would your clients have had to pay for the goods and services your organization provided last year if they would have had to buy them from a local business?

Total value of goods/services ($) __________

Comments __________

21. How many individuals did your organization reach through direct program activities and assistance last year?

Number of individuals __________

Comments __________

22. Which category best describes the primary economic group your organization serves?

- Low income
- Moderate income
- High income
- Low-to-moderate income
- Moderate-to-high income
- All income groups

23. How many individuals (including board and committee members and other volunteers) volunteered for your organization last year?

Number of volunteers __________

24. About how many of these volunteers also had full-time jobs?

Number of volunteers __________
25. About how many total combined hours were worked by your organization's volunteers last year?

Number of hours

26. Please describe an act of service your organization provided last year that you take special pride in accomplishing.

27. Did your organization pursue any new service projects last year? If so, please provide at least one example that stands out to you.

- Yes
- No

An example that stands out to you:

28. Compared to 2011, did your organization find it more difficult or less difficult to accomplish its revenue goals last year?

- More difficult
- Less difficult
- About the same

Please explain:

29. What is your revenue (capital) target for 2013?

Please enter your numeric target here in dollars:
30. Compared to 2011, did your organization find it more difficult or less difficult to accomplish its **program** goals last year?

- [ ] More difficult
- [ ] Less difficult
- [ ] About the same

Please explain:

31. How many of your employees are at each level of education?

<table>
<thead>
<tr>
<th>Level of Education</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than high school graduate</td>
<td></td>
</tr>
<tr>
<td>High school graduate</td>
<td></td>
</tr>
<tr>
<td>HS diploma/equivalency with some college education</td>
<td></td>
</tr>
<tr>
<td>Bachelor's degree</td>
<td></td>
</tr>
<tr>
<td>Graduate or professional degree</td>
<td></td>
</tr>
</tbody>
</table>

32. How many of your volunteers are at each level of education?

<table>
<thead>
<tr>
<th>Level of Education</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than high school graduate</td>
<td></td>
</tr>
<tr>
<td>High school graduate</td>
<td></td>
</tr>
<tr>
<td>HS diploma/equivalency with some college education</td>
<td></td>
</tr>
<tr>
<td>Bachelor's degree</td>
<td></td>
</tr>
<tr>
<td>Graduate or professional degree</td>
<td></td>
</tr>
</tbody>
</table>
About Beacon Economics

Beacon Economics is a leading provider of economic research, forecasting, industry analysis, and data services. The firm's internationally recognized forecasters were among the first and most accurate predictors of the U.S. mortgage market meltdown that began in 2007—and among a relatively small handful of researchers who correctly calculated the depth and breadth of the financial and economic crisis that followed. By delivering independent, rigorous analysis, Beacon Economics gives its clients the knowledge they need to make the right strategic decisions about investment, growth, revenue, and policy. The firm's clients span both the public and private sector, ranging from the California State Controller's Office to major universities to one of Wall Street's most successful hedge funds. Core service areas include economic and revenue forecasting, economic impact analysis, economic policy analysis, regional economic analysis, real estate market and industry analysis, and EB-5 Visa analysis. Visit Beacon Economics' website at www.BeaconEcon.com to learn more.

Services

- Economic & Revenue Forecasting
- Business, Industry, & Market Analysis
- Economic Development Analysis
- Ports & Infrastructure Analysis
- Public Speaking
- Expert Testimony

Contacts

- **Sherif Hanna**
  Managing Partner
  (424) 646-4656
  Sherif@BeaconEcon.com

- **Victoria Pike Bond**
  Director of Communications
  (415) 457-6030
  Victoria@BeaconEcon.com