

PORTLAND FISH PIER AUTHORITY
BOARD OF DIRECTORS
August 10, 2020, 3:00 PM

You are invited to a Zoom webinar.

When: Aug 10, 2020 03:00 PM Eastern Time (US and Canada)

Topic: Portland Fish Pier Authority Board of Directors

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Portland Fish Pier Authority Board Members:

Class A Director: Member of the Portland City Council - Nicholas Mavodones, President

Class B Director: Representing the Fishing Industry - Meredith Mendelson, ME Dept. of Marine Resources

Class C Director: Representing the Commissioner of MDOT - Matthew Burns, Treasurer

Ex-Officio Director: Representing the City Manager - Brendan O'Connell, Finance Director

Ex-Officio Director: President of the Board of the Portland Fish Exchange (PFX) Thomas Valleau, Vice President

- 1. Approval of June 8, 2020 Meeting Minutes - Action Item/Public Comment**
 - a. See attached draft meeting Minutes.
- 2. Financial Update - Material produced by Rhonda Girard, Finance, presented by Bill Needelman, Waterfront Coordinator - to be provided.**
 - a. An update on the status of deferred rent payments will also be provided.
- 3. Facilities Update - Phil DiPierro, Project Manager; Kathy Alves, Facilities Director**
 - a. See attached report.
- 4. Portland Fish Exchange update - Bert Jongerden, PFX General Manager; Tom Valleau, PFX President**

- 5. Lot 12A - Lease Assignment from Freedom Fish to Ocean Team, LLC (Blue Ocean Seafood) - Choun Muth, President/Blue Ocean; Sophy Im, Chief Operations Officer and Treasurer/Blue Ocean Seafood; Ernie Salamone, Atlantic Seafood Partners. The Board is asked to take three separate actions related to the planned sale of the Freedom Fish building on Lot 12A to Blue Ocean Seafood:**

- a. Assignment of Freedom Fish Ground Lease - Action Item
- b. Approval in concept of expansion plans - subject to Planning Authority and Inspections approval of site plans and building permits - Action Item
- c. Request for 30 parking spaces in the Front Lot - Action Item

Consistent with Executive Session statute 1 M.R.S.A. 405(6)(C) and (E), the Board may vote to go into Executive Session to review proprietary information and provide direction to staff.

Public Comment

- 6. Bristol Seafood, Lot 5 - Request to renegotiate ground lease and to discuss potential expansion plans. Peter Handy, President/Bristol Seafood**

- a. **Consistent with Executive Session statute 1 M.R.S.A. 405(6)(C) and (E), the Board may vote to go into Executive Session to review proprietary information and provide direction to staff.**

Workshop, no action.

- 7. Pierce Atwood Parking Lease, front lot - Request to renegotiate parking lease. Jim Gorman, Chief Operating Officer/Pierce Atwood**

- a. **Consistent with Executive Session statute 1 M.R.S.A. 405(6)(C) and (E), the Board may vote to go into Executive Session to review proprietary information and provide direction to staff.**

Workshop, no action

- 8. Seafood Industry interview and Strategic Planning: Bill Needelman, Waterfront Coordinator**

- a. Following direction provided at the June 8, 2020, meeting, the Waterfront Coordinator conducted a series of 20 interviews with leaders in the seafood industry. The purpose of the interviews was to better understand gaps, opportunities, and short-term actions available to better support seafood production and commerce at the Portland Fish Pier. Bill Needelman will summarize the results of the process and requests an executive session with the Board to discuss potential real estate related issues raised by the research.

A detailed Memo describing the interview process and results is attached.

Consistent with Executive Session statute 1 M.R.S.A. 405(6)(C) and (E), the Board may vote to go into Executive Session to review proprietary information and provide direction to staff.

Workshop, no action

9. Orientation Aerial Photo Attached - Context/Lots/Lease

- a. See attached aerial photo.

Draft Meeting Minutes

**PORTLAND FISH PIER AUTHORITY BOARD OF
DIRECTORS
June 8 2020, 3:00pm**

**Remote Meeting Format – ZOOM
Platform.**

Please click the link below to join the webinar:

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PFFA Board members present

Class A Director:	<i>Member of the Portland City Council Nicholas Mavodones, President</i>
Class B Director:	<i>Representing the fishing industry Meredith Mendelson, Department of Marine Resources</i>
Class C Director:	<i>Representing the Commissioner of the Maine DOT Matthew Burns, Treasurer</i>
Ex-Officio Director:	<i>Representing the City Manager Brendan O'Connell, Finance Director</i>
Ex-Officio Director:	<i>President of the Board of Directors of the Portland Fish Exchange Thomas Valleau, Vice President</i>

Staff present

Michael Goldman, Associate Corporation Counsel
John Peverada, Parking Manager
Bert Jongerden, PFX gen Manager
Bill Needelman, Waterfront Coordinator (note taker)

Pubic attending – From ZOOM list

Alan Tracy, Vessel Services
Blue Ocean Seafood, C Im, Ernie Salamone
Dan Jacques, Waterfront Maine
John Bissenet, MLU
Mike Foster, Vessel Services
Roger Woodman, At large

Other unidentified number

1. Approval of April 14, 2020 Meeting Minutes
Action Item – Public Comment

Approval of February 10, 2020 Meeting Minutes
Postponed from the April 14, 2020 meeting.

Motion: *To approve the April 14 and February 10, 2020 minutes as submitted.*
Moved by Valteau, 2nd by Mendelson. No public comment. **Passed by vote of 5-0**

- 2. Financial update** - Including statements covering the period from February to May, 2020. Material produced by Rhonda Girard, Finance, was presented by Bill Needelman, Waterfront Coordinator.
- 3. Facilities update** - Memo was prepared by Phil DiPierro, Project Manager, and presented by Bill Needelman, Waterfront Coordinator.
- 4. Portland Fish Exchange update and sub-tenant rent deferral reimbursement request** - Tom Valteau, PFE President, Bert Jongerden, PFE General Manager

Mr Jongerden presented a somewhat grim update on the first month in the PFX FY and fishing year. 45,000 lbs through the PFE – well below budget. Herring coming in, but Area 3 just closed. Pogies have not arrived. The PFE Board authorized an audit. Moving forward with oyster handling equipment with strong industry interest. Browne Trading is in and doing well until July or perhaps longer.

Ms. Mendelson noted worries over the trajectory of the PFE – low prices, low volumes, and getting worse. She noted the timing and need for strategic planning – made difficult in current times.

BJ: Fish draws buyers. Gill netters struggling with early dogfish arrival. Boats need the lobster revenue with low prices (going to MA.) Fuel prices higher here. Fortunately, the buyer base is the same and prices today are better. Hoping for better prices in July. Whole monk prices are down, \$.50/pound, keeping the gill netters home.

MM: Need to diversify revenue: aquaculture, cold storage?

BJ: Shell stock storage in winter helps, but revenue is low. Continue to meet with aquaculture reps. Have applied for MTI funding of oyster equipment.

MM: Suggested summer storage of oysters to hold product (*during pandemic while sales are down, staff edit.*)

Mr. Valteau inquired about use of Federal Payroll Protection Program loan status.

BJ: Received loan of \$121,000 – will run out by June. Should be forgiven.

TV: Request by the PFE for compensation for sub-tenant rent deferral if needed – Dropping Springs and Cozy Harbor have only partially deferred payment to date. Looking for motion.

Based on discussion, the Board decided to delay action on the request to a later meeting to better understand the extent to which the subtenants will take advantage of the deferral.

NON-AGENDED ITEM – Vessel Services Request for Food Cart Along Commercial Street

Based on a request from Vessel Services President, Alan Tracy, the Board considered proposal to site a seafood oriented food cart on the front parking lot, adjacent to the Commercial Street sidewalk. Siting a need to diversify revenues due to loss of fish and event business, Mr. Tracy described a cart that would sell lobster rolls, fish sandwiches, and hotdogs staffed by family from the Vessel Services team. Seafood would be locally sourced. Board and Mr Tracy discussed location, permitting needs, and agreement document (license vs lease.)

Motion: *The Board authorizes staff to negotiate and the President to sign a revocable license agreement between the Portland Fish Pier Authority and Vessel Services for Vessel Services to locate and operate a seasonal food cart on Fish Pier property along Commercial Street in the vicinity of Lot 1-1.* Moved by Valteau, 2nd by Mendelson.

Public Comment:

Dan Jacques, Waterfront Maine: Support, but not exclusive to this proposal.
Monique Coombs, MCFA: Support. Vessel Services is important and their unique position should be documented in the agreement.
End Public Comment

Board Discussion:

N. Mavodones: Support. Need to be nimble. VS to work with staff on details.

Passed by vote of 5-0, unanimous

The following items were taken out of order to allow combining executive session material to be discussed together at the end of the meeting. Note: Numbering from the agenda is maintained.

8. Options for Strategic Planning:

Staff asked for direction from the Board on options for strategic planning moving forward in the face of the on-going pandemic. Options presented include but are not limited to:

- No action – delay strategic planning
- RFP – move forward with a consultant led process as previously discussed
- Staff driven strategic process – utilize Economic Development staff, PFE staff, and other City Departments, augmented by technical or professional consultant support for specific tasks
- Staff driven limited actions targeted toward specific outcomes. Examples:
 - Research opportunities for PFX Lobster auction
 - Identify industry needs and infrastructure gaps
 - Monitor short-term industry needs driven by the pandemic
 - Berthing expansions
 - Other actions suggested by the Board...

T. Valleau: The trajectory is not good within the industry and this is the wrong time for an expensive consultant study – later. Grants may be available shorter term.

M. Mendelson: Infrastructure investment opportunities may be available soon or now. Need a targeted plan in the short term.

N. Mavodones: Support staff led model

MM: Need to dovetail with Alliance for Marine Economy process. Look to MTI, Island Institute, and other economic recovery efforts – look at ***gaps opportunities, short-term actions.*** (*industry needs and infrastructure, editor's note, emphasis added.*) Outreach can be aligned with other efforts.

TV: The Fish Exchange needs to be more than a fish auction – needs other revenues.

M. Burns: MDOT is available to assist – infrastructure planning

B.Jongerden asked Ms. Mendelson about federal relief monies under MeDMR control?

MM: Working on it with the goal of release within a few weeks.

BJ: Noted success and popularity of seller fee rebate program.

Needelman will continue individual stakeholder outreach and using feedback will return to the board through the President with a work plan prior to the next meeting.

9. **Update on the Portland Harbor Dredge and CAD projects: Portland Harbor Commercial Revitalization Project – CRP.** *Bill Needeman, Waterfront Coordinator*
Needelman reported that the BUILD grant had been submitted. If awarded, the PFPA can expect to be asked for contribution of tipping fees. Will return to the Board with specifics, pending funding award.
10. **Update on the potential to develop a cold storage facility at the International Marine Terminal.** *Bill Needelman, Waterfront Coordinator*
Needelman reported that the cold storage facility at the IMT is moving forward and has applied for development permits.
NM noted that community outreach by the development team is underway.
MB noted development team and Port Authority leadership in the project.
6. **Waterfront Maine Request to amend lease terms and development agreement on Lot 12** – Dan Jacques, Waterfront Maine

Following discussion at the February 10, 2020 meeting, Waterfront Maine, current lease and development option holders on Lot 12, requested an opportunity to discuss with the Board extending their lease expiration from March 31, 2021 until September 30, 2023.

Waterfront Maine currently pays \$1750/mth in rent (\$60.34 per parking space based on 29 parking spaces for Browne Trading.) Staff suggested escalating this fee to \$2610 (increasing the fee to \$90/mth parking space equivalents or \$1.31/sq ft yearly rate for the entire lot based on 23,922 sq ft.)

Motion: The Board approves an extension of the Waterfront Maine Lease on Portland Fish Pier Lot 12 from its current expiration of March 31, 2021 to

September 30, 2023. Furthermore, the monthly rent on the will increase to \$2610 per month. Corporation Council is authorized to draft such amendments to the Waterfront Maine Lease for signature of the Portland Fish Pier Authority President.
Moved by Mendelson, 2nd by Burns.

Public Comment: None

Passed by vote of 5-0, unanimous

5. Lot 12A – Freedom Fish Building - Guidance on lease assignment

The Board was asked to provide guidance to staff on ground lease issues associated with the planned sale of the Freedom Fish building on Lot 12A to Blue Ocean Seafood.

No action on this item was requested at the June 8 meeting.

Representatives of the Blue Ocean team, Mr. C. Im and Ernie Salamone, introduced themselves stating that they were requesting an assignment of the Freedom Fish lease and an additional 25-30 parking spaces in the front lot.

Consistent with Exec Session statute--1 MRS 405(6)(C) & (E) the Board voted to go into Executive Session to discuss Agenda Item 5, Lot 12A – Freedom Fish Building - Guidance on lease assignment, and Agenda Item 7, COVID -19 response- Fish Pier Tenant Status and Potential Response

Motion (after the fact) by Mendelson, 2nd by Valleau, **Passed by vote of 4-0**, O'Connell stepped away

Motion (to return to public session) by Mendelson, 2nd by Burns, **Passed by vote of 4-0**, O'Connell stepped away

Public Session:

7. COVID -19 response- Fish Pier Tenant Status and Potential Response – Bill Needelman, Waterfront Coordinator

On April 13, 2020, the Portland Fish Pier Board passed the following motion:

The PFPA authorizes deferral of all lease payments for ground lease and berthing tenants until June 30, 2020, and such payments shall not be due until the 2021 calendar year. The President of the Board is authorized to execute any lease amendments or other documents prepared by the Corporation Counsel required to memorialize the deferral.

Staff asked for direction from the Board on next steps. Board members expressed uncertainty around the future of the economy moving forward depending on the trajectory of the pandemic and opined that the repayment schedule should be discussed

in the future when more was known.

Motion: That rent deferrals for ground lease and berthing tenants, consistent with the April 13, 2020 action by the Board, are extended until September 30, 2020.

Moved by Valleau, 2nd by Burns

Public Comment: None

Passed by vote of 4-0 (O'Connell stepped away)

Meeting Adjourned:

Motion by Valleau, 2nd by O'Connell, **Passed by vote of 5-0**
5:25pm



PORTLAND MAINE

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To: Portland Fish Pier Authority Board
From: Philip DiPierro, Facilities Project Manager
Date: July 27, 2020
RE: Facilities Update
CC: Kathy Alves, Facilities Director

Please find below a listing of the monthly improvements to the Portland Fish Pier by the Facilities Department:

Updates for June 2020 - July 2020

- The Cathodic Protection Project project is almost complete. Waterworks Diving Services completed the installation of the anodes. All that remains is for the system to be tested. Testing is scheduled for September 1st.
- Fore River Dock and Dredge will continue working on the pile replacement project around the facility where needed. Pile replacement work is expected to continue throughout the year.
- The City has hired a paving contractor to complete the grading and paving project between the Marine Trade Center and Bristol Seafood. Work is expected to be completed in August.
- Seacoast Security Co. completed the installation of two additional new security cameras along the west side of the Fish Pier near where the Marine Patrol and Harbor Master boats are berthed. We now have 4 cameras to monitor the area.
- Seasonal grounds maintenance work is ongoing throughout the complex. SeaBreeze performs weekly mowing, trimming, etc.
- Waterworks Diving Services completed cleaning of the camels around the service piers and along the transient berthing areas.

Updates for April 2020 - May 2020

- The Cathodic Protection Project has started. Waterworks Diving Services began work on June 1st at sorting pier #3 (behind Cozy Harbor).
- Fore River Dock and Dredge has pulled 21 old wooden piles, and re-installed 21 repurposed composite piles along two sides of the Net Yard area. Pile replacement work is expected to continue throughout the year.
- Tec Associates completed a proposed grading plan for approximately 7,900 square feet of the driveway and parking area at the northeast corner of the Marine Trade Center. Surface drainage and puddling in this area have been problematic. The City has met with four contractors to review the work scope for grading and paving, and is awaiting the submission of proposals to complete the work.
- Seacoast Security Co. completed the installation of two new security cameras along the west side of the Fish Pier near where the Marine Patrol and Harbor Master boats are berthed.
- Seasonal grounds maintenance work has started throughout the complex. SeaBreeze is performing weekly mowing, trimming, etc., and the City is filling potholes.

Updates for February 2020 - March 2020

- The Cathodic Protection Project has been temporarily placed on hold due to the COVID-19 pandemic. The anodes have been delivered, and are currently stored inside the warehouse building at the Portland Ocean Terminal. Waterworks Diving Services will begin installing the anodes when it is safe to start. No specific start date has been given at this time.
- Fore River Dock and Dredge has pulled 17 old wooden piles, and re-installed 15 repurposed composite piles along two sides of the Net Yard area. Work has temporarily been placed on hold due to the COVID-19 pandemic. Work will continue when it is safe to re-start. No specific start date has been given at this time.
- Tec Associates completed a proposed grading plan for approximately 7,900 square feet of the driveway and parking area at the northeast corner of the Marine Trade Center. Surface drainage and puddling in this area have been problematic. The City will be soliciting proposals from contractors to complete grading and paving work based on the plan.
- Seacoast Security will be installing two new security cameras along the west side of the Fish Pier near where the Marine Patrol and Harbor Master boats are berthed. Work is expected to start within the next couple of weeks.

Updates for December 2019 - January 2020

- The anodes (232) for the Cathodic Protection Project have been delivered, and are currently stored inside the warehouse building at the Portland Ocean Terminal. Waterworks Diving Services expects to begin work starting in late March or early April, depending on the weather.
- Fore River Dock and Dredge has been hired by the City to begin pile replacement work on the east side of the Fish Pier facility. Deteriorated and worn wood piles along the berthing areas on the east side of the Net Yard are being replaced with repurposed composite piles that have been salvaged from the Portland Ocean Terminal Fender Replacement Project.
- Two cabinets with 20 inch life rings and 60 foot emergency heaving lines, have been installed along the western side of the Fish Pier facility berthing areas. One life ring has been installed on the sign structure across from the Marine Trade Center, and the other life ring has been installed on the end of the substation building behind Vessel Services.

Updates for October - November 2019

- We are currently working with Waterworks Diving Services to finalize the contract for the Cathodic Protection Project so that work can begin. The new anodes have been ordered by Waterworks Diving Services.
- Zebra striping completed additional striping in the Net Yard to better delineate the area for commercial fishing activities, and adjacent to the Marine Trade Center in an effort to slow traffic making it safer for pedestrians leaving the building.
- General maintenance throughout the complex - additional sweeping, pallet removal and disposal, etc.

Updates for August - September 2019

- A total of 3 bids for the cathodic protection project have been received. Waterworks Diving Services is the low bidder. We are currently working with Waterworks Diving Services to finalize the contract so that work can begin this fall.
- A new upgraded fire alarm panel was installed in the electrical building behind Vessel Services.
- Zebra striping has been hired to complete additional striping in the Net Yard to better delineate the area for commercial fishing activities, and adjacent to the Marine Trade Center in an effort to slow traffic making it safer for pedestrians leaving the

building. Speed bumps or speed tables are also being considered if the striping fails to work.

- Seabreeze Property Services has been hired to complete maintenance services, ie weeding, trash removal, sand removal, trench drain maintenance, etc. around the Fish Exchange Building.
- Approximately 950 square feet of gravel parking area will be paved near the northeast corner of the Marine Trade Center to help promote positive drainage in the area.

Updates for June - July 2019

- The cathodic protection project is currently out to bid. A pre-bid meeting was held at the facility on Wednesday July 31, 2019, to discuss the project with interested parties/contractors. A total of 5 contractors attended the pre-bid meeting. Bids are due by 3:00 pm on Wednesday August 14, 2019.
- Speed limit and boundary limit striping in the Net Yard area was completed.
- Seabreeze Property Services has completed sweeping services of the parking lots and roads throughout the facility.
- Catch basin cleaning of the entire facility was completed by the City's Sewer Department.
- Approximately 950 square feet of gravel parking area will be paved near the northeast corner of the Marine Trade Center to help promote positive drainage in the area.

Updates for April - May 2019

- Seabreeze Property Services has started summer maintenance services including mowing, weeding, pruning, and mulching plant beds. They are also being scheduled to sweep the parking lots and roads throughout the facility.
- Catch basin cleaning will be scheduled with the City's Sewer Department after the parking lot has been swept.
- The bid package for the cathodic protection project has been finalized for bidding.
- Approximately 950 square feet of gravel parking area will be paved near the northeast corner of the Marine Trade Center to help promote positive drainage in the area.

Updates for February - March 2019

- BTT Marine Construction Company was hired to complete pile maintenance work around the Service Piers and Net Yard areas.
 - 5 Wooden piles within the Service Piers area were replaced with 5 composite piles that were removed from the Portland Ocean Terminal project.
 - 3 wooden piles in the Net Yard area were replaced with 5 composite piles that were removed from the Portland Ocean Terminal project.
 - Several piles in the Service Pier area were raised and re-bolted.
 - Several Chocks and wales were also repaired and rebolted.
- The Net Yard farelead and roller assembly was resecured to the concrete curb, and the face of the sheet pile wall below the roller was reinforced with additional composite piles (2 piles were removed and 4 composite piles were reinstalled).
- A new 10 yard dumpster was delivered to the site and positioned outside the Fish Exchange Building. The fish gear recycling area has been closed and the new dumpster will now be used to dispose of the gear.
- The bid package for the cathodic protection project is in the process of being finalized for bidding.
- Seabreeze Property Services is in the process of being scheduled to start spring cleanup and winter sand removal throughout the facility.

Updates for October 2018 - January 2019

- Seabreeze Property Services completed sweeping the Net Yard and the rear of the Marine

Trade Center.

- Waterworks Diving Services spent two days cleaning camels around the service piers and along the berthing space on both sides of the pier.
- Tec Associates was hired to complete a Limited Routine Inspection of the sorting piers and the service piers, including an underwater inspection. Wayne Duffett, PE, is in the process of preparing a written report, which is expected to be submitted soon.
- In an effort to eliminate illegal dumping in the Net Yard, a decision has been made to relocate the Net Yard fishing gear recycling area. The current area will be used for parking, and a locking dumpster will be located in close proximity to the Fish Exchange building.
- We plan to complete pile and pier maintenance around the service piers, sorting piers, and berthing space. Various piles will be replaced, some will be pulled and re-bolted, and issues with chocks and wales will be addressed.
- Cathodic protection for each pier has reached the end of its' useful life. We will be looking into soliciting bids to replace the anodes.

Updates for September 2018

- Seabreeze Property Services completed sweeping of the parking lots and roads throughout the facility (except for the Net Yard), completed landscape maintenance including, weeding, tree pruning, mulching plant beds, and providing stone drip edge around portions of the Fish Exchange building.
- Speed limit striping in the Net Yard area was completed.
- A basic visual inspection was completed by City staff of the service piers and the sorting piers to assess the condition of the piles, chocks, wales, ladders, hardware, etc. The inspection will be used as a guide to schedule future maintenance work and repairs.
- A sink hole was discovered behind the sheet pile along the seawall between Vessel Services and the Marine Trade Center. We are in the process of evaluating the damage in order to complete repairs.
- Staff has contacted three engineering firms for proposals to complete a "Limited Routine Inspection" of the sorting piers and the service piers. The inspection will include assessment of the steel piles and cross bracing, pile caps, beams, decking, mooring hardware, and the fender system, with options for an underwater inspection and vertical load ratings.
- A new fire alarm panel has been installed to replace the failed panel in the electrical building behind Vessel Services.
- Camel cleaning has been scheduled with Waterworks Diving Services and is expected to be completed this month.
- Broken piles around the various piers are planned to be replaced.

Updates for May 2018 – August 2018:

- Seabreeze Property Services is being scheduled to sweep the parking lots and roads throughout the facility, to complete landscape maintenance including, weeding, tree pruning, mulching plant beds, and providing stone drip edge around portions of the Fish Exchange building.
- The erosion and drainage repairs have been completed in the netyard area.
- The sidewalk repair along the Portland Fish Pier Road has been completed.
- The catch basin lowering project has been completed.
- Speed limit striping in the netyard area is to be completed within the next month.
- Broken piles around the various piers are planned to be replaced.
- We are in the process of getting proposals to add concrete curbing at various locations around the inside and outside of the Fish Exchange building; to replace sections of the channel-grate drains inside the Fish Exchange building; and to install

- a dumpster pad under the dumpster at Cozy Harbor.
- Emergency repairs were made to a leaking water line the serves the building leased by Mr. Tamaki.

Updates for February 2018 – April 2018:

- Seabreeze Property Services has been scheduled to start spring cleanup and winter sand removal throughout the facility.

Updates for December 2017 – January 2018:

- The Fish Exchange electrical upgrade is complete as of January 27th.
- The first phase of the ventilation system at the PFEX is scheduled to be installed Saturday, 2/10/18 in the locker room area. The second phase of the system will be installed in the breakroom.

Updates for August - November 2017:

- A new 25yd self-contained compactor was installed at the Fish Exchange.
- Drainage issues in the parking lot at Bristol Seafood were addressed. A catch basin installation along with grading and paving, improved an ongoing drainage problem in the front parking lot.
- We will be installing a ventilation system at the PFEX in the locker room/common area.

Updates for July 2017:

- Pavement striping has been completed in various areas of the facility. These are changes that were discussed at the Fish Pier Authority Meeting to help with parking issues.
- The first phase of the electrical upgrade for the Fish Exchange has been completed. The components are being designed and will be ready for install in November approximately.
- New composite camels have been installed. (4) at the Fish Pier and (2) at the Fish Exchange.
- We have placed an order for a new 25yd self-contained compactor for the Fish Exchange.

Updates for June 2017:

- The majority of winter sand and spring cleanup was completed in May. Seabreeze will return to finish a few areas.
- We are getting quotes on pavement striping. Work tentatively scheduled for July/August.
- Bert and the electrician are working with CMP to coordinate the first phase of the electrical upgrade project.

**ASSIGNMENT AND ASSUMPTION
OF LEASE AGREEMENT**

THIS AGREEMENT is made as of this ____ day of _____, 2020 (the “Effective Date”), by and between **FREEDOM FISH, LLC**, a Maine limited liability company with a place of business in Portland, Maine (the “Assignor”), **OCEAN TEAM PROPERTY, LLC**, a Maine corporation having place of business in Scarborough, Maine (the “Assignee”), and the **PORTLAND FISH PIER AUTHORITY**, a Maine non-profit development authority with a place of business in Portland, Maine (the “Landlord”).

W I T N E S S E T H:

WHEREAS, by virtue of an Assignment And Assumption Of Lease Agreement dated August 29, 2014, a copy of which is recorded in the Cumberland County Registry of Deeds, Book 31768, Page 188, Assignor is a Tenant under a certain Lease Between Portland Fish Pier Authority And Atlantic Resource Enterprises, LLC dated January 25, 2001, copies of which are annexed hereto (the “Lease”); and

WHEREAS, Assignor desires to assign and Assignee desires to acquire, the rights and obligations of Assignor under the Lease.

NOW, THEREFORE, in consideration of One Dollar and other valuable consideration, the sufficiency and receipt of which is hereby acknowledged, the parties hereby agree as follows:

1. Assignment. Assignor hereby sells, assigns and transfers to Assignee all of Assignor’s right, title and interest as Tenant in the Lease, subject to all obligations, agreements, encumbrances and restrictions affecting Assignor’s interest in the Lease.
2. Acceptance. Assignee hereby accepts this assignment and transfer and promises and agrees to perform faithfully all covenants, stipulations, agreements and obligations of the Tenant under the Lease. Assignee hereby agrees to indemnify and hold Assignor harmless from any and all losses, claims, demands, actions, causes of action, suits, proceedings, damages, liabilities and other costs and expenses of every nature whatsoever, incurred by Assignor and arising out of, caused by, or as a result of Assignee’s use and occupation of the leased premises or Assignee’s breach of any covenant, stipulation, agreement or obligation set forth in the Lease, including without limitation, reasonably attorneys’ fees which Assignor may incur by virtue of any claim asserted against Assignor related to the Lease.
3. Landlord’s Consent and Release of Freedom Fish, LLC. Landlord hereby consents to the assignment by Assignor to Assignee of its rights as Tenant under the Lease and acknowledges that Assignee shall become the sole responsible party as Tenant under the Lease as of the Effective Date. With the exception of the indemnity provisions set forth in Section 14 of the Lease, which Assignor agrees shall survive this Assignment and the

termination of the Lease, Landlord hereby fully and unconditionally releases Assignor, and agrees to look solely to Assignee, for all of Tenant's obligations arising after the Effective Date under the Lease. Notwithstanding the foregoing, Assignor shall remain liable to Landlord for the performance and observance of the covenants, stipulations, agreements and obligations contained in the Lease to be performed and observed by the Tenant prior to the Effective Date.

4. Binding Agreement. This Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective successors and assigns.
5. This Agreement may not be changed, modified, discharged or terminated orally or in any other manner than by an agreement in writing signed by the parties hereto or their respective successors and assigns. No further assignment of the Lease will be valid except upon the express written consent of Landlord.
6. Governing Law. This Agreement shall be governed by and interpreted in accordance with the laws of the State of Maine.

IN WITNESS WHEREOF the parties have executed this Assignment and Assumption of Lease Agreement the day and year first written above.

OCEAN TEAM PROPERTY, LLC

Witness

By:
Its: President

FREEDOM FISH, LLC

Witness

By:
Its:

PORTLAND FISH PIER AUTHORITY

Witness

By:
Its:

By:_____

Name:

Title: Treasurer

Witness

STATE OF MAINE

County of Cumberland, ss

July ____, 2020

On this ____ day of July, 2020, before me, the undersigned notary public, personally appeared _____ as President of **Ocean Team Property, LLC**, and acknowledged the foregoing as his/her free and voluntary act and deed as an officer of said entity, duly authorized.

Notary Public

My commission expires:

STATE OF MAINE

County of Cumberland, ss

July ____, 2020

On this ____ day of July, 2020, before me, the undersigned notary public, personally appeared _____ as _____ of **Freedom Fish, LLC**, and acknowledged the foregoing as his/her free and voluntary act and deed as an officer of said entity, duly authorized.

Notary Public

My commission expires:

STATE OF MAINE

County of Cumberland, ss

July ____, 2020

On this ____ day of July, 2020, before me, the undersigned notary public, personally appeared _____ as _____ of **Portland Fish Pier Authority**, and acknowledged the foregoing as his/her free and voluntary act and deed as an officer of said entity, duly authorized.

Notary Public

My commission expires:



Economic Development Department

Memorandum

To: Nick Mavodones, President, Portland Fish Pier Authority and Members of the Board of Directors

From: Bill Needelman, Waterfront Coordinator

Date: July 22, 2020

Re: Portland Fish Pier Strategic Planning, Report of Seafood Stakeholder Interviews Conducted between 6-8 and 7-6-20

CC: Greg Mitchell, Economic Development Director

Introduction

As part of an ongoing discussion regarding strategic decision-making for the Portland Fish Pier, the following memo documents recent work to date by the Waterfront Coordinator and the City Economic Development Department. During June and July of 2020, the Waterfront Coordinator conducted a series of individual interviews with leaders in the seafood economy. These interviews generated a tremendous reservoir of information as summarized below. Economic Development staff has further extracted observations from the process, generated recommendations for consideration by the Board, and drafted a suggested short-term work plan moving forward.

Background

In late 2019, responding to ongoing changes in the seafood industry the Portland Fish Pier Authority Board directed City Economic Development staff to engage in a strategic planning process for the Portland Fish Pier to inform decision-making on a ten-year horizon. Preliminary steps in the strategic planning process were undertaken, including multiple workshops with the PFFA board. On December 9, 2019 at a well-attended public workshop, ED staff presented a draft *Request for Proposals* (RFP) for consulting services for strategic planning. After significant discussion with the Board and attending seafood industry stakeholders, the Board directed staff to finalize and advertise the RFP. In January 2020, staff held an industry listening session to

assist with prioritizing issues for consulting emphasis with the expectation of advertising the RFP in early 2020.

The Covid-19 pandemic upended the planned RFP process. By April, the PFPA Board and staff were shortening timeframe for decisions from decades to days, concentrating efforts on rent relief for Fish Pier ground lease tenants.

At the June 8, 2020 PFPA Board meeting, Staff asked for direction from the Board on options for strategic planning moving forward in the face of the on-going pandemic. Options presented included but were not limited to:

- No action – delay strategic planning
- RFP – move forward with a consultant led process as previously discussed
- Staff driven strategic process – utilize Economic Development staff, PFE staff, and other City Departments, augmented by technical or professional consultant support for specific tasks
- Staff driven limited actions targeted toward specific outcomes. Examples:
 - Research opportunities for PFX Lobster auction
 - Identify industry needs and infrastructure gaps
 - Monitor short-term industry needs driven by the pandemic
 - Berthing expansions
 - Other actions suggested by the Board...

Board members were supportive of moving forward with a staff driven process and suggested expanded stakeholder outreach to identify seafood industry gaps, opportunities, short-term actions. Board members clarified that the Portland Fish Exchange needed to be included in the discussion. Staff committed to continue individual stakeholder outreach and, based on the results of industry feedback, would return to the Board with work plan prior to the next meeting.

Methodology

All interviews took place between June 8 and July 6, 2020 by phone excepting one in-person coffee. Participants were asked to talk about anything related to the Fish Pier that they felt warranted discussion.

Goals for the process were described by Needelman as a search for: ***Seafood industry needs/gaps, opportunities on the Fish Pier to meet industry needs, and short-term actionable recommendations.***

The format was informal and conversational. Each interviewee was provided opportunity to review their blurb prior to publishing and some edits were incorporated. No interviewee was provided access to the feedback of others. All interviewees were encouraged to provide additional attributed comments directly to the PFPA Board of Directors.

Stakeholder Selection and Stakeholder group profiles

Stakeholders were selected opportunistically from Needelman's established network or by recommendation by other interviewees. The group represented herein is not comprehensive and some selection bias by Needelman favoring known individuals within his network is assumed. Attempts were made to seek a diversity of industry representation, ages and genders; however, the interviewees roughly reflected the industry in being predominantly male and over the age of 40. Eight of twenty interviewees were under the age of 40, only three were women, and all interviewed stakeholders were apparently Caucasian or race was unknown.

Needelman's reliance on "industry group" representatives reflected a desire to gain as broad a perspective as possible given the format and informal nature of the process. Some of the interviewees wore "multiple hats" and are counted twice within the census below. Several of the "industry group" representatives had previous harvesting experience, however only active harvesters and 2 retired harvesters were counted within the "harvester" category.

Interviewee representation:

- 9 business owners/managers in either seafood or related industries
- 8 industry groups
- 6 harvesters (2 retired, one family crew)
- 2 financing interests

Reporting

The following excerpted notes and conversation summaries provide a representational sample from all of the conversations and have been edited to protect the individual identities of the interviewees wherever possible. The comments are reported roughly in the chronological order in which they were conducted and the order of presentation does not reflect a bias toward content or prioritization of feedback.

Sample Comments from Fish Pier interviews

- *Direct consumer sales needs small processing space - HACCP approved. Lobster auction and public takeout may reproduce what is happening privately. Aquaculture is the future opportunity. Stonington model worth a look. San Diego model.*
- *Wild harvest is inevitably moving toward aquaculture. Existing infrastructure (PFX) is attractive to new users and can lower barriers to entry for startups and smaller operators. Sharing equipment, space, access to trucking.. all needed in expanding aquaculture industry. A coop model worth exploring. The Port Clyde Fresh Catch model worth a look. Diversity of product is valuable. - Wild, farmed, fin fish, shell fish, lobster, seaweed.... Could open the PFX up by RFP to small operators. Lots of interest in value added services and products - extending shelf life - as an alternative to restaurant sales.*

- *There are +/-1500 acres under aquaculture lease state-wide (small number). Look to cooperative best practices. The industry needs offloading, wharfage, overwintering for oysters (cold storage,) short-term cold storage, processing capacity. Aquaculture ground lease area expanding by about 5%/year. Shellfish are taking a bigger hit with COVID than finfish. The business model at the Exchange needs a redo. However, aquaculture generally wants to own as much of the supply chain as possible due to small volumes. Coops are forming to share costs. Much shellfish processing takes place at sea, at the farm. Seaweed has more processing potential - food, supplements, animal feed additives, "nutra-suticals." Cattle feed sector may be a game changer. Bottle necks in the industry - Fresh frozen, drying capacity. Possible to share capacity with other seafoods, byproduct processing.*
- *The PFX is critical infrastructure - much dissatisfaction in the industry. Observers struggle to understand management and decision making. There is confusion about the relative roles of the PFX Board and PFFA Board. What is the relationship between the PFX and PFFA boards? City of Portland? The PFX is non-profit but behaves like a business: and, receives bailouts - Confusing. Is an Auction the right answer? Fundamental question: What is the mission? The fishermen are seeing high fees, low prices, and no "hustle." - Not the manager's fault. It's a Board problem. Board has incomplete information and doesn't seek out additional voices. There are models to look at. Need to bring voices together, state \$, and explore innovating. Is staffing the problem? Yes and no. Without enough product - decline becomes a self-fulfilling prophecy. - -86% of value reduction from May 2020 to 5 year average. - including a 440% increase in unsold product. Pandemic is showing pre-existing issues. The Board's strength (longterm members) is its weakness (lack of new vision.) Groundfish needs to be there (PFX.) Good time to innovate.*
- *Complex issues. Small volume auction still viable. What does the industry need (fish cutting?) Lobster harvesters will diversify catch - will need spot to sell (can the PFX auction very small volumes?) Lower the barriers to both sellers and buyers. Don't plan for large volumes. Look to value added. Partner with chefs. Dragged lobsters a barrier to volume. Quality control will help prices - small, simple solutions. Look at branding and promotion. PFX transparency is an issue.*
- *External influences are out of the control of a planning process - Covid, bureaucracy, ground fish collapse. Need to constrain thinking to actionable issues - concentrate, focus. Many opportunities to support blue economy. Infrastructure \$ likely coming as response to COVID from feds. Think about a framework as opposed to "plan." Critical question: How can a conservative, bureaucratic institution (PFP) provide a platform for fast and nimble entrepreneurial actors in the Blue Economy? There are many unmet needs - example - bait freezing.*

- *Diversification of revenue. Provide what can't be provided elsewhere on Waterfront. Lobster boat berthing is a need. Remain available to ground fish, but Diversify!*
- *Lobstermen looking to control their own product. Need a facility to help. Lobstermen don't feel welcome on the Fish Pier. Town piers with takeout available elsewhere up and down the coast. Lack of contract unloading of lobster is a problem. Berthing needed. Open to a lobster auction – but need more information. Lobster needs a place to operate. The Fish Pier Authority needs one or two commercial fishermen on it as the bylaws call for and also the Authority needs a professional landlord on it that has a better understanding of lease, rental and renewal agreements.*
- *The Desert (Net yard) is invaluable. It is small, but always busy. For larger fish volumes, Boston has better prices. For short trips and smaller volumes, PFX is attractive. Need the flexibility to handle some portion of our own product. The PFX staffing is critical; as the boat crew are spent by the time they hit the dock. I need \$(x) for the boat and not getting it. Would like to serve the local market (retail and wholesale) with a lower volume. Can see a future where more harvesters want to gain value from a portion of their own catch - fisherman's market comparable to a farmer's market. To become a buyer on the PFX - \$15K letter of credit and approval by the Board may be too much to expect for a low volume auction. Lower the barrier to entry and handle small lots to reflect a niche local market. Make the PFX highly accessible -for buyers and sellers at large and small volumes and all types of seafood (will need staff to do well.) Lobster auction will likely disrupt dealer model and be unpopular - but could be worth it to promote diversity. For vessel, the PFX model still works - unless fish goes unsold and/or prices are low. Need more buyers, serve smaller lots, serve aquaculture, look at serving the tuna fisherman (likely cross docking, but maybe auction.) Serve the all harvester types - tons of potential and opportunity. Serve all of the harvester types - diversity.*
- *There is a pivotal industry concern with potential loss of the PFX and Fish Pier - given losses elsewhere in ME, any loss of access would be problematic. Questions: What infrastructure is needed to support industry in transition? Aggregating and direct consumer mail orders (Amazon lobsters?) cold storage? Look the "Edible Sea" market study. Aquaculture processing capacity - needs to grow. Oysters are growing into large scale operations. The footprint in seafood is constrained. Key aggregation points needed. Competition (from non-marine use) in other ports is creating a demand for space in centralized urban areas with critical infrastructure - like the fish pier. Need in-state processing for lobster and other products. Ice and fuel may need support - critical infrastructure. There are new opportunities - Kelp needs dehydration – Refrigeration units produce heat. Look for opportunities for efficient co-location. There are gaps: Vision, no broader connections (such as to terrestrial farming,) gaps in financing*

seafood, gaps in marketing - statewide, beyond lobster. Grants help to reduce risk. The Fish Pier needs marketing and a public facing enterprise. Tell the positive stories. Lobster needs space - berthing.

- *PFX (and Fish Pier) have a perception problem. Women not welcome - big problem as more women are needed. Aquaculture has needs that could be met (at the PFX): hoist, refrigerated storage, trucking. The facility needs to be cleaner. Better separation of products, clearer warehousing protocols and product control, address standing water. Inspections could be an issue (food safety.) Aquaculture could use a clear list of services and charges. Would need a new food safety plan. Big needs in flash freezing and cold storage - start ups struggle to buy equipment. Oysters don't need much, but PFX needs to change to meet industry needs. Fundamental change is needed. Groundfish are continuing to go down. Ask: Who is not at the table? If you keep having the same group of people at the table, you will keep getting the same answers. Bring in young people and women and people working in all different sectors of seafood. It's important to break out of consistently consulting the good old boys (or ladies) club or we won't be able to adapt to the future.*
- *Remarkable how much has remained consistent from the late 1990's (using a DMR report as a guide.) Separating the PFX from the Fish Pier is still warranted, but with lower volumes, maybe not as necessary as previously. The Fish Pier was designed around larger ground fish vessels and the fleet has transitioned to smaller boats. Berthing demand now comes from smaller boats, suggesting that berthing and take out (on a municipal pier model) may be needed. "Exclusivity" afforded tenants of the Fish Pier (PFX, Vessel Services) a challenge. Look at other town fish piers (Rockand, Stonington...) for models of management. The herring pump out at PFX is a comparable model as may be used for lobster. Explored electronic lobster auction in the past, no storage, picked up at port landed. Interesting that price transparency - still an issue with lobster - is apparently a challenge today on the exchange. The PFX needs to market itself - like 'direct to consumer' sellers doing now. During times of scarcity, need an auction model for smaller volumes. The board structure for both PFX and PFFA needs evaluation - it's a smaller industry - one board? If Lobster Auction is considered, beware fees that are too high (problem last time.) Expect dealer concerns. Experience with Co-op model - can work - as can the "contract unloading" model. Consider an on-site lobster auction. Canadian models include pre-negotiated prices - much consolidation. Actions: Lobster Dock, service to aquaculture, evaluate board structure.*
- *Frustrated with lack of urgency on part of PFX board. Board needs fresh blood. The overlap between PFX board and PFFA board needs a look. Do there need to be two boards? Maybe not. The board members are rarely on the fish pier. They need more sources of information. The replacement of the PFX gen manager needs a fresh perspective. Example of fresh thinking: Trucking is drying up: seek options for trucking*

from local operators for contract transport for fee - just need to make the call. Speak to the harvesters.

- *The aquaculture industry is open to opportunities on the Fish Pier. Water quality within 4 miles of the pier will limit harvesting locally, but north of Portland Harbor, Casco Bay is establishing as a grow center. Growth expected to continue. Berthing, vessel offloading, vehicle parking, staging/temporary wharfage, ice and fuel, refrigeration (cold storage), access to ground trans/trucking - all needed at an affordable price. Fish Pier is well positioned to receive and distribute product. Growth of product supply should continue. Threats. Should explore with growers needs and opportunities to use PFX - including potential for auctioning product. Challenges of gentrification (in and out of Portland) area threat to the industry.*
- *Covid-19re-think everything - market shifting from food service to retail. can't hire the people to keep up with growth. Encouraged by retail and seeing hope from food service. Extremely busy. Planning process needs to understand scope of control. Capital will flow to opportunity. Need to foster an area (the PFP) for capitalism - production. Parking areas could be valuable production buildings. PFX - ossified - stubborn. Fish is hot - bring some swagger. Need better lots (PFP parcels) for development. It's hard to make little plants (facilities) however there is lots of interest in +/-2000 sq ft spaces. Reconfigure the lots to bring in more tenants. Avoid scope creep. The PFX is not the Fish Pier - you can't fix what you don't control. Need good ideas - create a forum to bring folks together. Foster an environment where risk and innovation can exist. Good business models are bankable.*
- *The PFX is generating discussion in the industry. More variety of feedback the better. Speak to the industry. Lobster is looking to use the docks, but can't. Cod is gone. What other fish are there to fish? Things are sporadic and seasonal. Do we need to grow? Maybe. Will we need space for new species? Black sea bass, squid, ...? However, we can count on aquaculture - predictable. Covid is a stress and some farmers will not be left standing - others will. Oyster market will return. Unit production going up and unit price will drop - requiring efficiency. Fish Pier can play a role in oyster distribution. Focus Maine has ID'ed aquaculture as a growth industry for the state. Infrastructure that can support multiple users need to scale up the industry. Will big aquaculture (on land and traditional) have a need? Can industries share infrastructure? Trucking will be a need - shared? Lobster industry is about to transition.*
- *The Fish Pier vacant lots are not useful - badly configured and have poor truck access. That needs to change if there will be new development. Change would result in loss of parking. Larger processors need larger lots. Incubator space is more realistic for the Fish Pier - 3000 sq ft, flexible, shared loading, floor drains. "Built right" for fish and aquaculture with high load capacity floors, poured walls up to 4', good truck access.*

Offices and support on 2nd floor. You'd likely lease them before it was built. There is room for a boutique fishery. 3-10 smaller, fast boats, short trips, long-line or small draggers. To stay in finfish, bring super high quality for a high price for sale in small lots on the PFX. Encourage value add in the incubator sites. The big boats are gone and won't come back due to lobster rules.

- *We need boats. There is no fish. We lost the boats with the lobster rules and it won't come back. Without trucked fish, we're done. Trucking costs are killing us.*
- *What we need is more ground fish. We have lost boats to Gloucester, but the more fish the better. We want to market locally caught fish, but there isn't consistent supply. Small boats (jigging) are inconsistent. If the PFX attracts more of these boats, that would make it more consistent and more dependable. Explore reducing fees on the PFX to attract boats. A lobster auction is interesting - much would depend on whether the auction lot would be graded lobster or a "boat run" (mixed sizes and shell hardness.) More interested in an auction of graded lots - again, consistency. Interest in modest sized processing space - especially if there were access to refrigerated storage.*
- *The virus has changed everything. All of the old business models are broken, but the direct to consumer model - **more like a farmers market** - is thriving. Exploding demand.*
 - (1) *The traditional **auction model is not working**. It's set up for thousands of pounds, but those boats are gone. Small scale food production is doing well and is resilient to the threats of the virus. The Fish Pier and the PFX have no public access or ability to market directly to the public. The farmers market model is working to serve both local boats and consumers. The PFX is perfectly set up to do it safely. Look to the Seattle Pike's Place market - we could do that here. Promote foot traffic through social media to the PFP and bring in terrestrial farms. A wholesale component can be incorporated into the Farmers Market Model for restaurants - like an auction. PFX has too much staff, too much overhead, and doesn't serve the small fleet (small landings) with good prices or hours of operation - they can't operate 24/7, but that is needed. Spend the \$ on a new model.*
 - (2) ***Tuna:** The PFX should be able to handle tuna but would need to staff at the needed hours - the boats don't keep a regular schedule. At a minimum, there should be a public take out or after hours service for a fee. Noted need to process tuna locally for local market - giving boats a better price and making product accessible to individuals and restaurants. HACCP plans are doable at a marginal cost.*
 - (3) *Bring **in lobster**. Only need a few tanks.*
 - (4) ***Provide value added services** for the boat. **Processing space** can be added - look to Community Sourced Processing model (Northwest Atlantic Marine*

*Alliance.) Incorporate other services needed by the harvesters, such as **packaging and shipping** – could be done by a third party. Leverage capacity at Vessel Services.*

*(5) **Social media** will drive the numbers and make it viable as a public facing facility.*

What did we learn?

The Fish Pier stakeholder interviews were instructive on the scope and details of needs of the seafood industry and the potential role of the Fish Pier moving forward. The process also laid bare many of the longstanding concerns that have been expressed regarding both the Fish Pier and the Portland Fish Exchange. Within these concerns, *governance and transparency* loom large with the Exchange taking much but certainly not all of the criticism.

"PFX" or "Exchange"	36 mentions
"Lobster"	28 mentions
"Aquaculture"	16 mentions
"groundfish" or "finfish"	12 mentions
"trucking"	9 mentions
"Infrastructure"	8 mentions
"storage"	8 mentions
"oyster"	6 mentions
"refridgeration" (...ated,... ators..)	6 mentions
"cold storage"	4 mentions
"Tuna"	3 mention
"farmers market"	2 mention

Takeaways – personal reflections (WBN)

The process of systematically interviewing 20 leaders within the seafood economy provided a detailed look at the industry, the Fish Pier, and the Portland Fish Exchange. The seafood sector is an ancient industry that carries a burden of historical conflicts, fractionalization, distrust, and turf wars. Such internal conflicts are well known, but continue to inhibit collaboration, innovation and adaptation. All participants brought their varying perspective to the conversations, giving strong credence to areas of agreement.

Observations

- The Portland Waterfront is positioned to serve the state's seafood sector – access to markets, transportation, labor, financing, innovators and entrepreneurs.
- The Fish Pier provides the key critical infrastructure needed to serve the seafood industry moving forward: Berthing, load/unload, ice, fuel, refrigeration, storage, gear work, processing, trucking and distribution, parking.

- PFEX and Vessel Services are critical infrastructures – including Net Yard
- The PFX business model needs to retool to new realities – smaller volumes, smaller lots, lower barriers to entry. Multiple alternative models, both those including an auction and others without an auction, are worth exploration.
- Governance for both the PFPA and the PFEX is poorly understood by many in the industry.
- There are strong voices calling for changes in governance structure and representation for both the PFPA and the PFEX boards.
- At the PFEX, harvesters appear less satisfied with the status quo than buyers/processors – but only marginally so.
- Portland Harbor is a small boat harbor and the Fish Pier is not currently configured to serve the fleet – physically or operationally.
- Many do not see a large-scale return of larger groundfish vessels to the PFEX.
- Ground fish footprint is shrinking, but holds a place in the future – there are opportunities at smaller, “boutique” volumes generated by short trip, high quality harvesters.
- Aquaculture will provide predictable and growing product volumes into the future.
- Lobster is the foundation of the seafood industry regionally and lobster harvesters want to be on the PFP – potentially also at the PFEX.
- State lobster landing rules continue to dissuade groundfish landings at the PFEX.
- There is a mixed opinion on a lobster auction at the PFEX. If a lobster auction attracts greater numbers of vessels and variety of landings for the PFEX, through small lot inshore ground fish, scallops, and/or tuna landings, it is worth considering.
- Tuna is gaining importance as a fishery for the small boat fleet and is not being served by the PFEX or the PFP. Take out, refrigeration, and processing are immediate needs. There is modest interest in a tuna auction. Lack of a Scromboid HACCP plan is a barrier, but surmountable.
- The PFEX has the ingredients to serve a new and emerging seafood economy, but change is needed. The anecdote of cleanliness concerns need immediate attention as the reputation of the facility will suffer. *Note: PFEX staff stresses that federal inspections have not found any problems.*
- The Netyard needs better cleanup protocols by the users, more frequent sweeping. *(personal observation by wbn)*
- The Herring Pump operations need consistent hose down protocols.
- Many harvesters - ground fish, lobster, and tuna – want increased control over their product after reaching the dock. Such harvester control would require services in handling, processing, freezing, and trucking.
- Processors and distributors need predictable supplies of quality raw material.
- The pandemic changed everything.

Final observation:

Despite the challenges and dissatisfaction expressed by many interviewees, there remains a strong interest in the Fish Pier as a place for business. In fact, ***the demand for operational space for processing and distribution appears to be increasing***. Start-up processors, growth in aquaculture, aggregators and distributors adjusting to the pandemic, the rise in direct consumer sales, and access to the predictable lobster resource all point to demand for quality, affordable space in the 1500 to 4000 sq ft range. Larger operators are also looking for opportunities to expand or locate in Portland. Berthing demand for vessels in the 30-50 foot range appears strong and not readily available from private wharfs. There is a future in seafood.

Recommended Immediate Actions: *Subject to Board consent and direction*

Fish Pier

- Explore redesign of lots and parcels to encourage development.
- Explore potential berthing and takeout dock for lobster and other small boat fisheries (tuna..)
- Explore potential for an incubator/start up processing facility on either existing or (potentially) reconfigured lots – *see above*.
- Assess the role of parking on the pier as both a revenue source and barrier to seafood utilization.

Fish Exchange

- Reduce fees – subsidized by the PFPA as needed for a fixed period of time.
- Improve sanitation protocols in the Netyard. Chase down the substance of the cleanliness concerns.
- Explore alternative payment guarantees and optimal auction lot sizes to encourage smaller volume sellers and buyers.
- Explore broadening the auction to include aquaculture products, lobsters, and possible HACCP adjustments to allow inclusion of Scombridae family species (tunas, herring, and mackerels.)
- Position the General Manager search to align with a stated goal for systemic change at the PFEX.

Recommended Short-Term Actions over the next 6 months:

Fish Pier

- Continue conversations and exploration of incubator space and shared service needs within the industry – including freezing, processing, packaging, trucking and marketing.

Fish Exchange

- Hire a General Manager with the experience, know how, and drive to lead the institution toward a stable business model that serves harvesters, buyers, and the seafood eating public
- Charge the new GM to seek input from both harvesters and buyers in the crafting and implementation of a new business model.

Fish Exchange and Fish Pier Boards

- Cooperate on governance and board structure review and self-evaluation.

Suggested Work Plan Moving Forward

August 2020:	1. Review results and findings of stakeholder interview process with PFPA Board and seek direction on physical layout, parking, and possible lease negotiations.
September 2020:	1. Coordinate with PFEX President and staff on General Manager search process to align goals for the PFPA with staff selection for the PFEX. Assist as requested by PFEX Board and staff. 2. Conduct due diligence on Fish Pier potential development scenarios, subject to PFPA guidance provided at the August 10 meeting. Continued stakeholder and tenant outreach to inform process.
October 2020	1. Report progress and findings to PFPA Board on work to date. 2. Conduct PFPA Board led workshop with stakeholders on governance and board structure. Invite PFEX Board participation.

Appreciation

The Economic Development staff greatly appreciates the time and insights provided by the interviewees that participated in this process. To a person, they brought knowledge and valuable perspective and were generous with their time during challenging circumstances. The continued formative involvement of industry stakeholders will be necessary regardless of the direction indicated by the Board moving forward.

Attachments

Executive session material under separate cover regarding lease issues and property development concepts

