



# Downtown Improvements: Special District Recommendations

Fall 2020  
Troutdale

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PPPM 629 Public Budgeting, EID Project



# Downtown Improvements: Special District Recommendations

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COLLEGE OF DESIGN

## **Acknowledgments**

The author wishes to acknowledge and thank the City of Troutdale for making this project possible. The assistance and contributions of the following staff were instrumental to the completion of this report.

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This report represents original student work and recommendations prepared by students in the University of Oregon's Sustainable City Year Program for the City of Troutdale. Text and images contained in this report may not be used without permission from the University of Oregon.

# Contents

4	<b>About SCI</b>
4	<b>About SCYP</b>
5	<b>About City of Troutdale</b>
6	<b>Course Participants</b>
7	<b>Executive Summary</b>
8	<b>Introduction</b>
9	<b>Context</b>
11	<b>Expenditures</b>
17	<b>Revenue Options for Troutdale</b>
11	<b>Expenditures</b>
25	<b>Evaluation Criteria</b>
29	<b>Student Group Recommendations</b>
31	<b>Findings</b>
32	<b>Conclusion</b>
33	<b>References</b>
35	<b>Appendices</b>

## **About SCI**

The Sustainable Cities Institute (SCI) is an applied think tank focusing on sustainability and cities through applied research, teaching, and community partnerships. We work across disciplines that match the complexity of cities to address sustainability challenges, from regional planning to building design and from enhancing engagement of diverse communities to understanding the impacts on municipal budgets from disruptive technologies and many issues in between.

SCI focuses on sustainability-based research and teaching opportunities through two primary efforts:

1. Our Sustainable City Year Program (SCYP), a massively scaled university-community partnership program that matches the resources of the University with one Oregon community each year to help advance that community's sustainability goals; and

2. Our Urbanism Next Center, which focuses on how autonomous vehicles, e-commerce, and the sharing economy will impact the form and function of cities.

In all cases, we share our expertise and experiences with scholars, policymakers, community leaders, and project partners. We further extend our impact via an annual Expert-in-Residence Program, SCI China visiting scholars program, study abroad course on redesigning cities for people on bicycle, and through our co-leadership of the Educational Partnerships for Innovation in Communities Network (EPIC-N), which is transferring SCYP to universities and communities across the globe. Our work connects student passion, faculty experience, and community needs to produce innovative, tangible solutions for the creation of a sustainable society.

## **About SCYP**

The Sustainable City Year Program (SCYP) is a year-long partnership between SCI and a partner in Oregon, in which students and faculty in courses from across the university collaborate with a public entity on sustainability and livability projects. SCYP faculty and students work in collaboration with staff from the partner agency through a variety of studio projects and service-

learning courses to provide students with real-world projects to investigate. Students bring energy, enthusiasm, and innovative approaches to difficult, persistent problems. SCYP's primary value derives from collaborations that result in on-the-ground impact and expanded conversations for a community ready to transition to a more sustainable and livable future.

## About City of Troutdale

Troutdale is a dynamic suburban community in Multnomah County, situated on the eastern edge of the Portland metropolitan region and the western edge of the Columbia River Gorge. Settled in the late 1800s and incorporated in 1907, this “gateway to the gorge” is approximately six square miles in size with a population of nearly 17,000 residents. Almost 75% of that population is aged 18-64.

Troutdale’s median household income of \$72,188 exceeds the State of Oregon’s \$59,393. Troutdale’s neighbors include Wood Village and Fairview to the west, Gresham to the south, and unincorporated areas of Multnomah County to the east.

For the first part of the 20th century, the city remained a small village serving area farmers and company workers at nearby industrial facilities. Starting around 1970, Troutdale became a bedroom community in the region, with subdivisions and spurts of multi-family residential housing occurring. In the 1990s, efforts were made to improve the aesthetics of the community’s original core, contributing to an award-winning “Main Street” infill project that helped with placemaking. In the 2010s, the City positioned itself as a jobs center as it worked with stakeholders to transform a large superfund area to one of the region’s most attractive industrial centers – the Troutdale-Reynolds Industrial Park.

The principal transportation link between Troutdale and Portland is Interstate 84. The Union Pacific Railroad main line runs just north of Troutdale’s city center. The Troutdale area is the gateway to the famous Columbia River Gorge Scenic Area and Sandy River recreational areas, and its outdoor pursuits. Troutdale’s appealing and

beautiful natural setting, miles of trails, and parkland and conservation areas draw residents and visitors alike. The City’s pride in place is manifested through its monthly gatherings and annual events, ranging from “First Friday” art walks to the city’s long-standing Summerfest celebration each July. A dedicated art scene and an exciting culinary mix have made Troutdale an enviable destination and underscore the community’s quality of life. Troutdale is home to McMenamins Edgefield, one of Portland’s beloved venues for entertainment and hospitality.

In recent years, Troutdale has developed a robust economic development program. The City’s largest employers are Amazon and FedEx Ground, although the City also has numerous local and regional businesses that highlight unique assets within the area. Troutdale’s recent business-related efforts have focused on the City’s Town Center, where 12 “opportunity sites” have been identified for infill development that respects the small-town feel while offering support to the existing retail environment. The next 20 years promise to be an exciting time for a mature community to protect what’s loved and expand opportunities that contribute to Troutdale’s pride in place.

## Course Participants

**TROY BRUNDIDGE**, Geography Graduate  
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## **Executive Summary**

As an element of its recently adopted 20-year Town Center Plan, the City of Troutdale identified improvements and revitalization of their downtown district and surrounding areas as a priority. Public Budget Administration graduate students were tasked with investigating funding options to improve and maintain their downtown commercial streetscape via a special district tax. This report examines the feasibility of two district types: Business Improvement Districts (BID) and Economic Improvement Districts (EID). Included in this report are recommendations for the size of the district, an examination of the creation of a Main Street Organization, and information on best practices gleaned from case studies conducted on the use of special tax districts in 10 different locations, including:

- McMinnville, OR
- Newport, OR
- Durham, NC
- Cottage Grove, OR
- Hillsboro, OR
- Bend, OR
- Miami, FL
- Oregon City, OR
- Salem, OR
- Corvallis, OR

Using Troutdale's goals for an EID/BID program, as well as insights from the case studies, this report provides an estimated expenditure for the first five years of Troutdale's EID/BID program, as well as funding options to help meet that goal. Five funding options are considered and analyzed for Troutdale's EID/BID funding:

- Option 1: EID based on the assessed value
- Option 2: EID based on square footage of the lot
- Option 3: EID based on square footage of the business
- Option 4: EID based on square footage of the frontage
- Option 5: BID- Business license surcharge
- Option Overlay: Tiered systems based on proximity to downtown core (either EID or BID)

Out of these options, the only one that reaches estimated expenditure goals is Option 2: EID based on square footage of the lot. However, Troutdale staff may also want to take into consideration the most politically sound options when it comes to combining EID and BID options and the possibility of tiered tax rates. This report includes tax rate options that could be further analyzed to determine which option or options best suit the goals and the needs of the Troutdale community.

## Introduction

The City of Troutdale recently completed an update to their Town Center Plan. As part of the plan, the city highlighted their interest in finding ways to fund and maintain streetscape elements within their commercial area. To help with this need, the city partnered with SCYP students to conduct research and provide recommendations for a special district funding mechanism.

An Economic Improvement District (EID) and Business Improvement District (BID) are instruments leveraged by local governments to fund specific programs or initiatives. The City of Troutdale is interested in utilizing an EID or BID to finance the development of the city's Town Center, which will be managed by a Main Street Organization. This report discusses how the implementation of an EID best suits the jurisdiction's long-term goals and objectives.

This report represents how the city can create taxable income for their goals and visions. A detailed exploration of the steps needed to establish a Main Street Organization, and a plan that is both equitable and beneficial to business and property owners will be outlined. This report will feature:

- A view of the City of Troutdale's Town Center
- Information about Main Street Organizations
- An explanation of the expenditures and a potential budget for streetscape improvement
- A review of revenue options including:

- Option 1: EID based on the assessed value
- Option 2: EID based on square footage of the lot
- Option 3: EID based on square footage of the business
- Option 4: EID based on square footage of the frontage
- Option 5: BID- Business license surcharge
- Option overlay: Tiered systems based on proximity to downtown core (either EID or BID)
- An evaluation of three different funding options
- Recommendations

Additionally, more information regarding enabling statutes and Main Street Organizations, as well as our calculations and case studies, can all be found in the appendices. In preparing this document, students consulted with staff from the City of Troutdale, reviewed state statutes, examined geographic data, executed a cost benefit analysis, and applied knowledge gained from Public Budgeting to come to a final recommendation for the City of Troutdale.

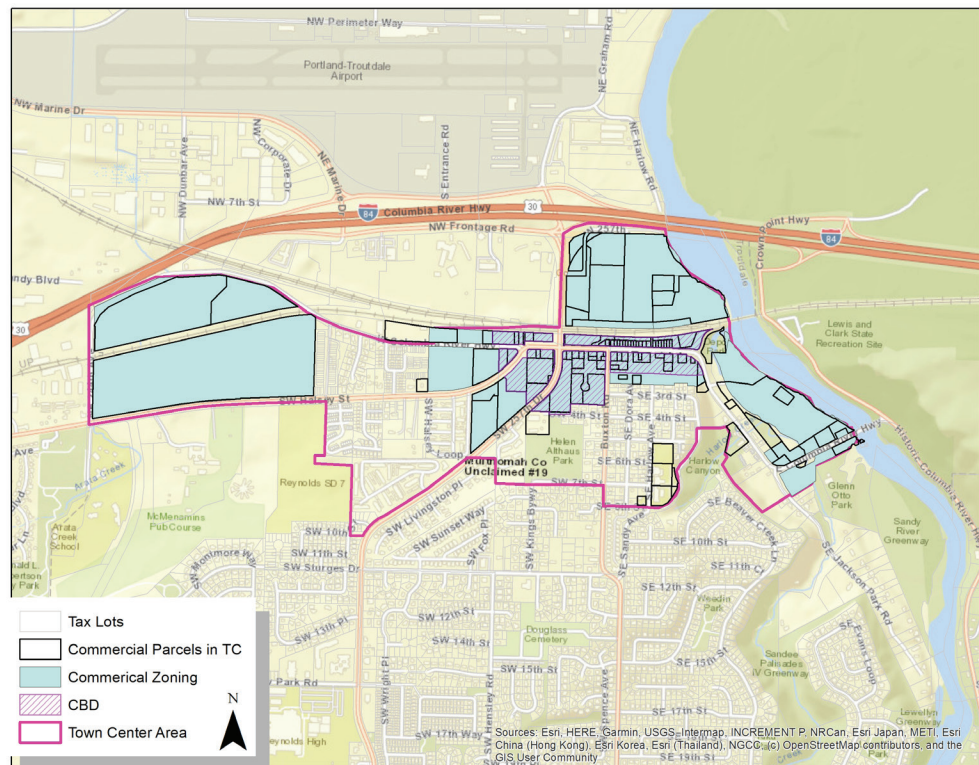
## Context

Troutdale’s Town Center Plan is aimed at planning for physical, social, and economic growth in the downtown area for the next 20 years. The greatest strength identified during public engagement was the area’s small-town feel. Troutdale strives to maintain their small-town community while developing the downtown center to accommodate growth, sustainable development, and improved design. Troutdale’s goals are focused on economic and social development, future trends, resiliency, resources, land use, transportation and mobility, and opportunity sites for both development and redevelopment (See Appendix C).

With the Town Center Plan guiding future development, Troutdale will benefit from the implementation of an EID and Main Street Program. An EID can improve the downtown area

with buy-in from local businesses and community members. Considering Troutdale’s proximity to Interstate 84, there is ample opportunity to revitalize the downtown area. This can increase tourism and provide a boost in revenue to the central business district. The City of Troutdale has proposed new streetscape design and programs intended to connect the community by providing clear areas for movement, rest, window shopping, dining, and other human activities to serve the diverse users of a downtown area. Streetscape design further helps define a community, and guides unconscious and conscious decisions about where and how individuals will spend their money (Troutdale, 2020). It allows for business owners to truly invest in their community, while also inspiring developers to invest as well.

**FIG. 1**  
**Map of the City of Troutdale’s potential special district(s)**  
 Source: Rebecca Lewis



It is important to consider the Town Center Plan, streetscape design, and long-term goals when developing criteria for an EID and Main Street in Troutdale. One of the largest considerations is which goals to support, fund, and eventually bring to action. Allocating resources and funding for the projects will be necessary for their success, as well as supporting projects that the community itself values. To form a recommendation for Troutdale, this report will evaluate multiple cities and their EIDs. The assessment will gather information on how these EIDs charge businesses, if they are equitable and efficient, how their Main Street affiliation coincides with the EID, and how applying these examples to Troutdale's Central Business District and surrounding areas can provide a beneficial EID and Main Street.

## I. GEOGRAPHIC EXTENT OF THE CITY OF TROUTDALE DOWNTOWN AREA

While the exact size of the special district is still being decided, Figure 1 provides a visual display of the geographic areas being considered. These include Zone A: the entire Town Center; Zone B: the Commercial Zones within the Town Center; and Zone C: the Central Business District. Zone A is the largest of the three areas and totals 348.5 acres or 0.5 square miles. Zone C encompasses the smallest of the three zones and Zone B falls in the middle.

## II. MAIN STREET ORGANIZATION

Troutdale intends to create the EID/BID to help with sustainability and funding of the organization as it starts off the development of an Oregon Main Street (OMS) Organization. In concurrence with Main Street America, a leading voice for economic development and community revitalization, it is suggested that transformation strategies should be organized around four different points (Main Street America, n.d.):

- Economic Vitality
- Design
- Promotion
- Organization

Being a part of a statewide program involves following various standards and requirements. Appendix D lists the different prerequisites and requirements for being a part of OMS, and while most of these are vague on budget, there are a few points that lead to budgetary impacts.

When evaluating what EID/BID system would work in Troutdale's context, it is important to remember other aspects of expenditures that come from participating in a program. Throughout this document, we consider the additional expenditures and benefits that come from being a part of OMS, and not just the design elements the Troutdale has identified as a vital expenditure.

## Expenditures

Selected improvements can be paid for from EID or BID revenues, in accordance with state statutes. We determined that the City of Troutdale wishes to focus on funding:

- The redesigning of street cross sections to create a safer user experience at all levels of mobility (walking, biking, driving).
- The incorporation of comprehensive wayfinding signage, including directories, parking and street signs, decorative street poles, etc.
- The creation of a new street tree plan and community landscaping program.
- The facilitation of undergrounding the assortment of PGE power boxes to ensure ADA compliance.
- The maintenance of new streetscape elements including benches, handrails, landscaping, etc.

To help estimate the costs for these improvements, as well as service costs, i.e. management, operations, marketing, sanitation, and administration of the EID/BID, we analyzed the budgets of other Main Street Organizations and corridor projects including Downtown Oregon City Association's budget and Kansas City, MO's Main Street Revitalization Project. Our cost projections are organized into three different cost opinions with annual expenditures outlined on a block-by-block basis over the course of five years.

### IMPROVEMENTS

**Hardscape costs** were primarily sourced from Kansas City, MO's Main Street Revitalization efforts, adjusted for inflation. This was chosen due to the breadth of their work and a high level of detail in their estimates (Kansas City, MO, 2008). **Street furniture costs** were derived from case studies of other municipalities' street furniture costs, collected and analyzed by the U.S. Department of Transportation (USDOT, n.d.). Hardscape improvements were put into these five categories:

- Site Preparation: Mobilization, sidewalk removal, street removal for crosswalks
- Paving: Sidewalks, curbs, crosswalks
- Planting: Street trees, perennials at planters, amended soil to limits of tree planter, 4'x'8' concrete planters or tree grates, mulch, drainage
- Streetscape Utilities: New street lights, wiring, controls, conduit, new curb inlets, storm pipe relocation, fire hydrant relocation, pipe reaming, cleaning
- Streetscape Structures: Edge treatments, neighborhood markers, gateway markers, art markers

In order to derive an estimate of the revenues required from the EID/BID to help fund the City of Troutdale’s wishes, calculations were conducted on a block-by-block basis, over the course of five years. These cost opinions are found in our three block improvement scenarios: Basic, Main Street, and Major. “Basic” improvements include the minimum necessary services and

improvements to provide properties in the EID/BID. “Main Street” is a low estimate for the cost of accomplishing the City of Troutdale’s five goals on at least one block. “Main Street (Major)” is a higher cost estimate of the total costs of achieving all five goals on one block. These costs are displayed in Figure 2 below.

<b>Basic</b>	<b>Main Street</b>	<b>Main Street (Major)</b>
<p><b>Services</b></p> <ul style="list-style-type: none"> <li>● Cleaning = \$5,000</li> </ul> <p><b>Amenities</b></p> <ul style="list-style-type: none"> <li>● 2x trash/recycling bin sets (spaced 250ft) = \$3,000</li> </ul> <p><b>Streetscape</b></p> <ul style="list-style-type: none"> <li>● Site Preparation = \$0</li> <li>● Paving = \$5,000</li> <li>● Planting = \$0</li> <li>● Streetscape Utilities = \$0</li> <li>● Streetscape Structures = \$10,000</li> </ul> <p><b>Total = \$20,000/block or \$4,000/year over 5 years</b></p>	<p><b>Services</b></p> <ul style="list-style-type: none"> <li>● Cleaning = \$5,000</li> </ul> <p><b>Amenities</b></p> <ul style="list-style-type: none"> <li>● 2x trash/recycling bin sets (spaced 250ft) = \$3,000</li> <li>● 2x benches = \$3,500</li> </ul> <p><b>Streetscape</b></p> <ul style="list-style-type: none"> <li>● Site Preparation = \$66,000</li> <li>● Paving = \$38,000</li> <li>● Planting = \$18,000</li> <li>● Streetscape Utilities = \$134,000</li> <li>● Streetscape Structures = \$65,000</li> </ul> <p><b>Total = \$332,500/block or \$66,500/year over 5 years</b></p>	<p><b>Services</b></p> <ul style="list-style-type: none"> <li>● Cleaning = \$5,000</li> </ul> <p><b>Amenities</b></p> <ul style="list-style-type: none"> <li>● 2x trash/recycling bin sets (spaced 250ft) = \$3,000</li> <li>● 2x benches = \$3,500</li> <li>● Bus stop/shelter = \$11,500</li> </ul> <p><b>Streetscape</b></p> <ul style="list-style-type: none"> <li>● Site Preparation = \$88,000</li> <li>● Paving = \$118,000</li> <li>● Planting = \$34,000</li> <li>● Streetscape Utilities = \$233,000</li> <li>● Streetscape Structures = \$184,000</li> </ul> <p><b>Total = \$680,000/block or \$136,000/year over 5 years</b></p>

FIG. 2  
Expenditure estimates

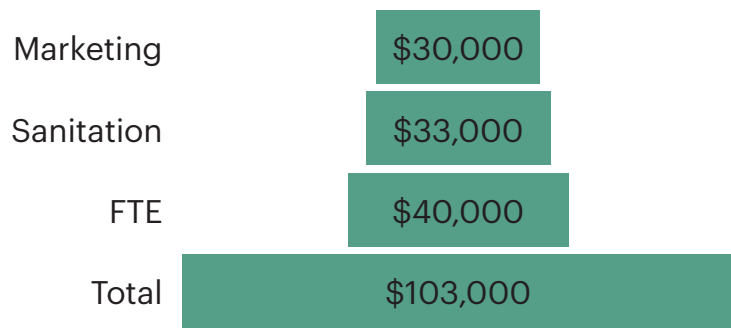
**SERVICES**

Initially, after conversations with Ms. Boxler, it became clear that the Transient Lodging Tax (TLT) would be used on management, operations, and marketing while the salary for a Mainstreet Organization employee (one FTE) would come from the general fund. As stated previously, while marketing costs will vary, Oregon City spent about \$30,000 on marketing in 2019 while the City of Salem spent \$25,000 in 2014. Based on the cost

per square foot of sanitation services retrieved from the Downtown Oregon City Association, we predict annual costs of \$33,000 for sanitation across the Town Center area. We estimate that administration and staff costs for one Full Time Equivalent (FTE) will total about \$40,000 per year. This can be seen in Figure 4 that follows. Because this dollar amount does not include benefits or additional staff-related costs, an actual FTE is likely to be higher.

FIG. 3  
Yearly service costs  
from mixed funding  
sources

### Yearly Ops Projections



Because the City of Troutdale will not be looking to fund these services from EID/BID revenues, these costs are not included in the block-by-block cost projections displayed above. If these costs were to be included in the total expenditures for one year,

- **Basic: \$107,000**
- **Main Street: \$169,500**
- **Major: \$239,000**

In order to accomplish the Troutdale's stated goals while providing basic services and improvements to much of the downtown area, we recommend Troutdale budget for at least one main street block and eight basic blocks' worth of improvement. This is estimated to amount to **\$1,007,500 over five years, or \$201,500 per year**, inclusive of the service fees listed above. This budget is conservative since it includes area beyond the six-block downtown.

## Revenue Options

In order to raise enough money to cover the estimated expenditures, we analyzed different revenue options for a prospective EID/BID, which include:

- A tax on the assessed value of the district’s property (EID)
- A tax based on square footage (EID)
  - Of the lot
  - Of the business
  - Of the lot frontage
- Business license surcharge (BID)
- Tiered systems based on proximity to downtown core (both EID and BID)

### **SYNTHESIS OF CASE STUDIES OBSERVED**

To analyze the different BID and EID options available to Troutdale, 10 different case studies were observed. Eight of the case studies are located in Oregon while two of them are in other states. The following table provides a synthesis of the information found:

City	EID or BID	Type	Amount
McMinnville, OR*	EID and BID	EID: Square footage (of the building)  BID: Membership dues, opt-in for benefits	Tier 1: \$0.075/sq ft Tier 2: \$0.0375/sq ft  BID: for downtown business: \$175 membership dues
Newport, OR	EID	Special Parking Area business surcharge, by number of employees	Fewer than five employees: \$150  Five to 20 employees: \$300  More than 20 employees: \$600
Durham, NC	BID	Funding from general property taxes	\$0.07 per \$100 assessed value on property
Cottage Grove, OR*	EID and BID	EID: Square footage (of the lot), Tiered  BID: Business License surcharge	Tier 1: \$0.05/sq ft Tier 2: \$0.02/sq ft  BID: \$50 annual business license surcharge
Hillsboro, OR*	EID	Assessed Value, Loosely tiered	0.4% to 0.6%



Bend, OR	EID	Square footage (of the business)	\$0.25/ sq ft
Miami, FL	EID and BID	Business license surcharge	(undefined)
Oregon City, OR*	EID	Square footage of the lot, Tiered	Tier 1: \$0.25/sq ft Tier 2: \$0.15/sq ft Tier 3: \$0.10/sq ft
Salem, OR*	EID	Square footage of the lot	\$0.07/ sq ft for developed property  \$0.02/sq ft for parking lots and vacant parcels
Corvallis, OR*	EID	Assessed Value	\$1.25 per \$1000 of assessed value for participating businesses.  Max taxable: \$3,500

FIG. 4

**Synthesis of case studies**

\* Indicates participation is Main Street America

More detailed information on each of these case studies can be found in the Case Study Appendices.

**BID EVALUATION**

A BID imposes a surcharge on business owners rather than commercial property owners. Some municipalities do this through a flat rate additional charge on annual business license applications or a range of rates based on the number of employees or annual gross revenue. In considering an additional charge on business licenses, the City of Troutdale's current business license includes an \$80 fee. In comparison to neighboring municipalities, this is high, apart from Gresham, which starts at \$75 but increases depending on the number of employees (City of Gresham, 2020). An additional expense on business licenses may make the City of Troutdale less competitive and appealing to new businesses. Additionally, access to data on the number of employees

and gross revenue for each business in the locality was unattainable. The City of Newport, Oregon attempted to fund parking infrastructure using an employee-based fee structure.

The proposed geographic regions, displayed in Appendix A, support 104-162 businesses. The surcharge on business licenses would need to be expensive based on the estimated expenditures. Given the extent of projects proposed by the City of Troutdale to be supported by BID revenue, the burden on the businesses, no matter the geographic boundaries, would be substantial. Further, similar considerations to the EID would need to be made in having a larger geographic area, to broaden the funding base. Broadening the funding base and utilizing the entire Town Center (Geography A) does allow for

more revenue, but again prompts the question of whether the businesses farther from the Central Business District will benefit equally from the improvement projects.

When deciding whether to establish an EID or BID, it's important to consider what would result in said program not being established because of rejections (Figure 5). There are 414 business licenses, so it would require 137 written objections to deny the creation of a BID. There are 61 owners of the property that could be assessed only requiring 21 written objections to deny an EID. Furthermore, most of the property owners (2/3) aren't located within Troutdale, and property owners that send in written objections are not assessed. It's more likely that the assessed property owners can pass the costs to their tenants than go through the effort of objecting to it.

A BID requires a total charge on a business license all at once. To generate similar revenue to an EID, each business would pay a charge of about \$1,000 at once. The benefit of an EID is that the assessment may be handled between the county and mortgage assessor. This lowers the administrative cost to the city as well as breaks up the fee into monthly payments.

### EID EVALUATION

An EID is one funding tool that the City of Troutdale could utilize to support improvements in their community primarily benefitting those conducting business within the EID boundaries. Revenue for an EID is collected from property owners through an additional property tax or an assessment fee

based on total square footage of commercial parcel structure or frontage length. Based on research of other cities' EIDs, imposing an additional property tax rate is not the preferred method, likely adding complexity and administrative costs. To avoid some of these complexities, the City of McMinnville, Oregon utilized a fee per square foot of structure and charged property owners a surcharge based on the assessed square footage of their building. See Appendix for additional details regarding McMinnville's EID implementation strategy. A similar method could be done utilizing tax lot frontage length. This option ensures properties that have the most contact with aesthetic improvements are paying a greater share of required costs. A consideration for charging property owners under an EID is the number of property owners who own more than one building in the EID. Should monopolistic property owners exhibit concern, the City of Troutdale should be thoughtful in proposing an EID to ensure the benefits to property owners are just as clear as any benefits businesses and the community generally will receive.

When looking at the EID options there are a few rules and limitations to consider based on state statutes. Within an EID, you can:

- set minimum and maximum values
- assess lot or business size
- charge a fee to each business license
- charge main street membership dues
- gain revenue from promotional events

Limitations of an EID include:

- funds are restricted to the defined geographic boundaries
- funds are restricted to ordinance-defined project(s)
- funding can fail to meet expectations with up to 32% of property owners not being assessed
- an advisory committee is only required if part of the ordinance

- If using assessed value as a standard for the EID, the assessed value has the capability of changing, which can provide both positive and negative results

The full list of relevant state statutes for establishing an EID can be found in Appendix D. These abilities and limitations were considered in our analysis of the EID options for Troutdale.

## Revenue Options for Troutdale

The five options considered in this analysis are as follows:

- Option 1: EID based on the assessed value
- Option 2: EID based on square footage of the lot
- Option 3: EID based on square footage of the business
- Option 4: EID based on square footage of the frontage
- Option 5: BID- Business license surcharge

These options are applied to the three zones (Zones A, B, and C) as explained in the beginning of this report. When looking at these revenue options for an EID/BID in Troutdale, there are some key considerations given these three zones, including the number of businesses in each and their square footage.

Key Considerations for the City of Troutdale's Three Regions				
	Regions	Sq. Footage of Region	No. of Businesses	Considerations
<b>Zone A</b>	Town Center	403,549	162	+ Highest no. of businesses/sq. footage - Less foot traffic at outskirts of region Sprawled geography of region
<b>Zone B</b>	Commercial Zone	316,660	148	+ Businesses concentrated in one central area - Sprawled geography of region
<b>Zone C</b>	Commercial Business District	166,788	104	+ Aesthetic improvements benefit all businesses - Fewer businesses/less sq. footage

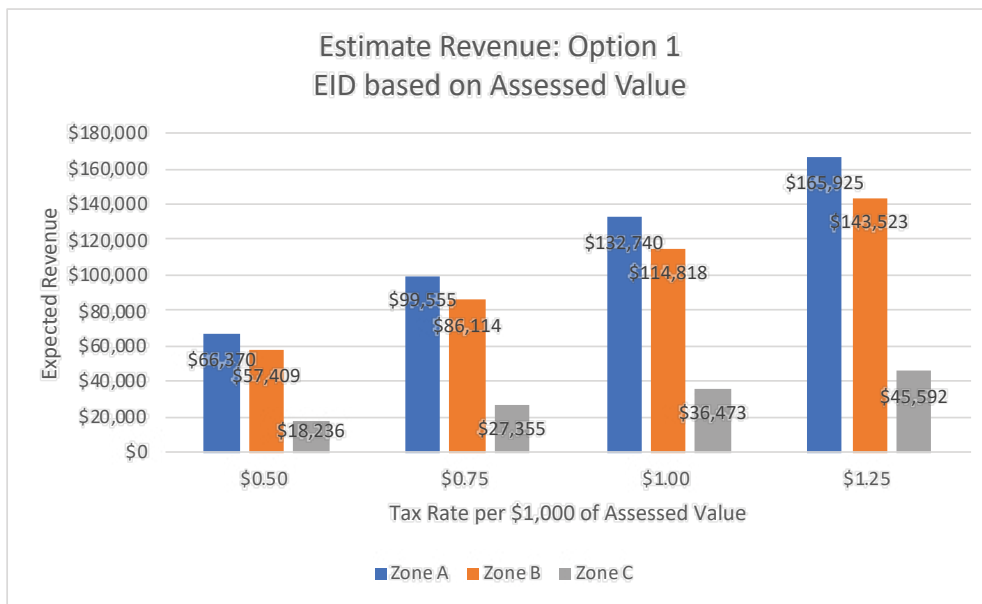
FIG. 5

Key Considerations for the City of Troutdale's Three Regions

**OPTION 1: EID BASED ON THE ASSESSED VALUE**

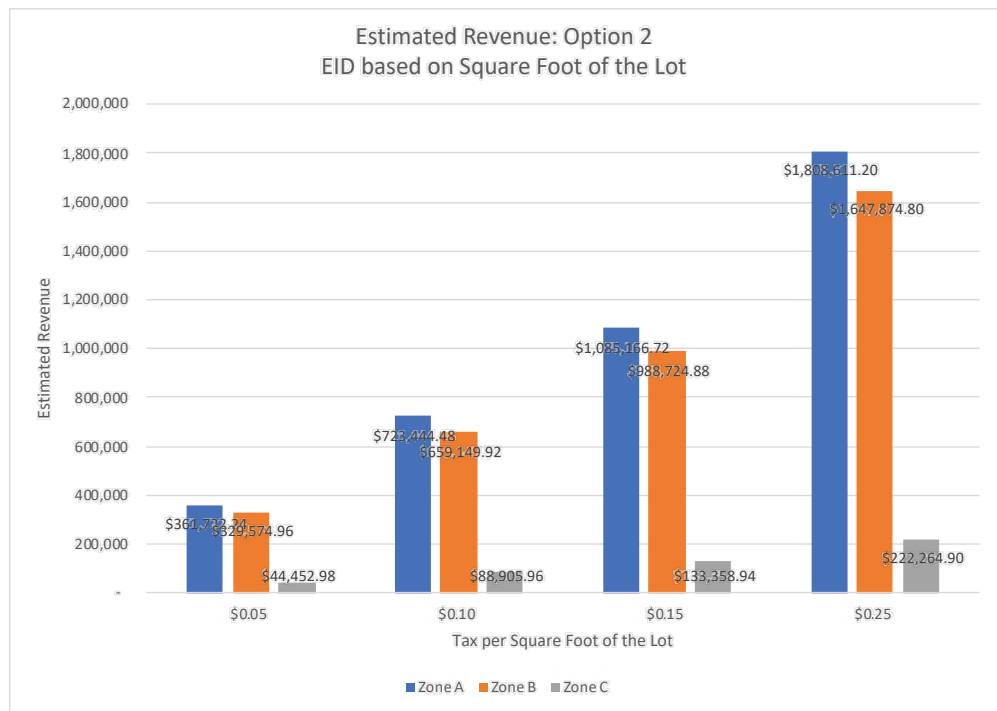
When evaluating the potential revenue created by taxes on the assessed value of property in the EID, the most fruitful zone for an EID would be Zone A: the entire Town Center. This zone ranks highest in assessed value and thus makes it the most viable option for revenue production. When developing options for the tax rate, the City of Troutdale’s current and former property tax rates, along with the debt service charges for bonds, were taken into account.

Based on historic precedent, political feasibility, and revenue production, four tax rate options were generated. These four options range from \$0.50 per \$1,000 of assessed value up to \$1.25, in \$0.25 increments. After determining the rate options, a 95% collection rate was then applied to the revenue estimates, as this holds as a conservative benchmark for tax collection.



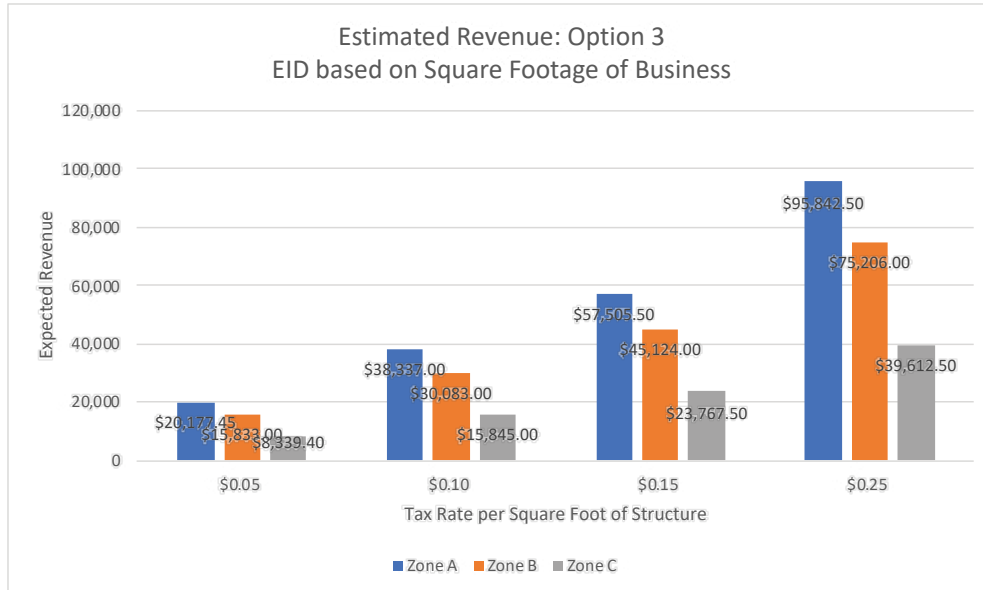
**OPTION 2: EID BASED ON SQUARE FOOTAGE OF THE LOT**

Similar to the results for the Assessed Value Taxes, Zone A proves to be the most fruitful option for revenue production, as it has by far the greatest amount of square footage among the three zones. Once again, four tax rate options were selected, this time from rates found in similar EIDs across Oregon or economic improvement districts such as Oregon City, where tax rates of \$0.10, \$0.15, and \$0.25 per square foot are imposed in their Property Management District. Our estimates include four tax rates ranging from \$0.05 to \$0.25. Other options for this type could potentially go lower, such as how Cottage Grove’s second tier goes for \$0.02 tax per square foot of the lot, but for the purposes of this report and for keeping Option 2 and 3 with the same data- that result was withheld from the chart as \$0.05 was the lowest category to reach revenue goals.



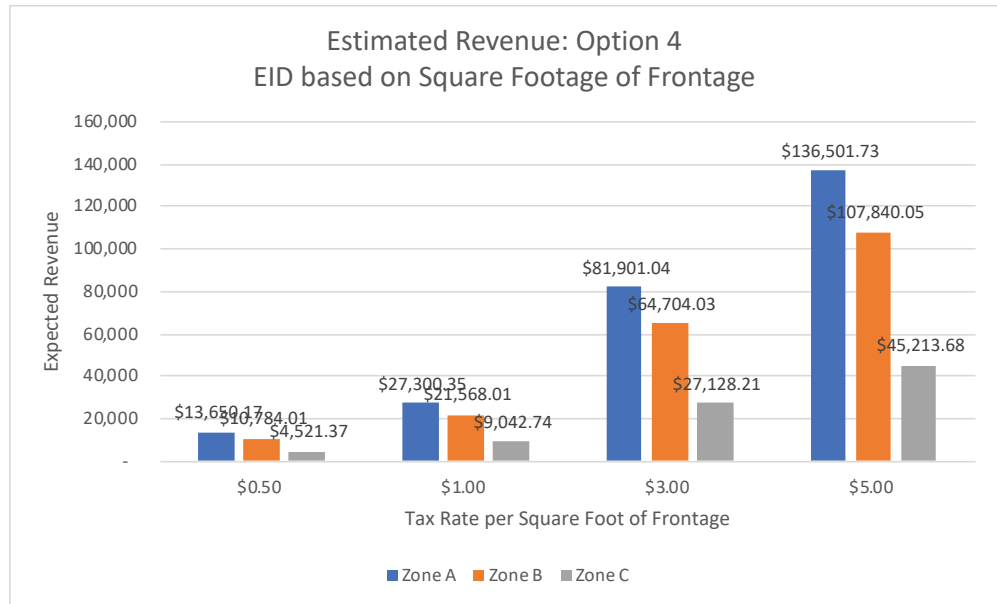
**OPTION 3: EID BASED ON SQUARE FOOTAGE OF THE BUSINESS**

Similar to Option 2, this EID option works off of the square footage of the business rather than the square footage of the lot. With both of these options, one thing to consider is that the larger areas (especially with Zone A which encompasses a larger space than the other two combined) might imply a higher cost required because of the amount of space that these businesses and land take.



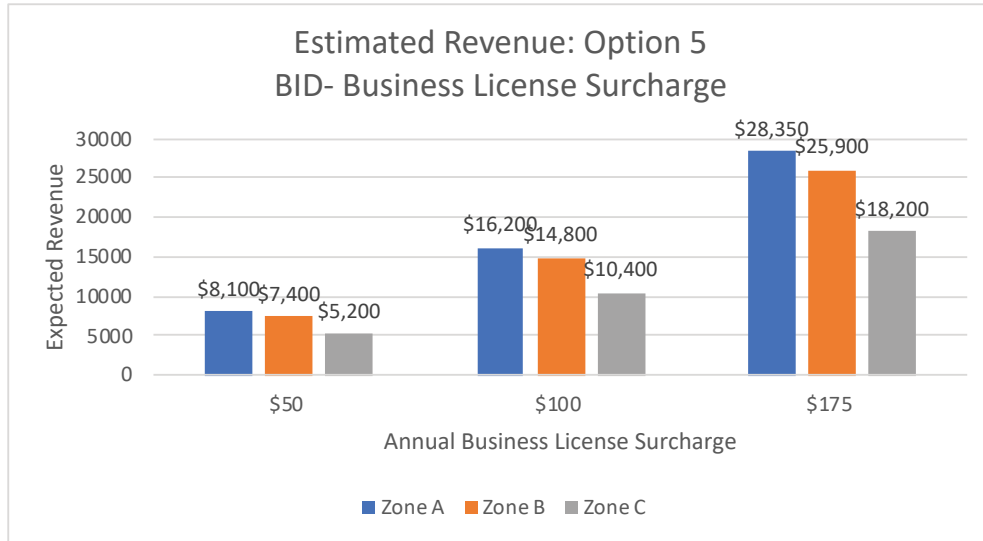
**OPTION 4: EID BASED ON SQUARE FOOTAGE OF THE FRONTAGE**

Part of the dataset given to the student groups included store frontage area in all three zones. While none of the case studies gave examples of square footage of the frontage of the business as an economic determinant for an EID, this seemed to be a valuable data point because properties with greater store frontage are likely to benefit more from EID projects than those with less. Given that no case study gave an example of this, the revenue rates were estimated based on what seemed reasonable. As a result, none of these options reach expenditure needs.



**OPTION 5: BID- BUSINESS LICENSE SURCHARGE**

Given the particular collection of case studies, there were not that many BID options observed. The primary ones being Cottage Grove and McMinnville, both of which have the BID as a supplement to their EID program. The following estimated revenue chart takes those two business surcharge amounts, with one in between to show what is a likely outcome for a business license surcharge in Troutdale.



One of the student groups argued that in order to establish a BID, the business license surcharge would have to be unjustifiably high. Their estimated expenditures for each Zone (or, Geography) was based on amenities per business, and is therefore higher than what is used for this report. However, the table breakdown they used to show the estimated surcharge required to reach revenue goals is compelling.

City of Troutdale: BID Revenue Estimates			
	No. of Businesses	Estimated Expenditures	Surcharge Rate
<b>Geography A</b>	162	\$269,416	\$1,663
<b>Geography B</b>	148	\$255,515	\$1,726
<b>Geography C</b>	104	\$213,201	\$2,050



Using that same logic and the expected expenditure of this report (\$201,500 annually), this would be similar:

City of Troutdale: BID Revenue Estimates			
	No. of Businesses	Estimated Expenditures	Surcharge Rate
<b>Zone A</b>	162	\$201,500	\$1,244
<b>Zone B</b>	148	\$201,500	\$1,361
<b>Zone C</b>	104	\$201,500	\$1,938

As an annual charge to businesses, this is not a reasonable singular source to reach expenditure goals.

**REVENUE OPTIONS SUMMARY**

When looking at the EID and BID options, there a couple of things to note:

- While a BID can not sufficiently cover the needs of Troutdale’s plans alone, various case studies, such as Cottage Grove, have both a BID and EID program. These programs can be layered on top of each other in order to reach financial goals while not pushing too high of a cost on singular sources.
- Installing a tiered system is also an option that can apply to any of these options. For a tiered system, Zone C would have a higher price point than Zone B as it is the downtown core. Zone A would not be considered in a tiered system as it encompasses both of the other zones.

The following table is a summary of all of the EID options available. As previously stated, the estimated budget is centered around the idea of budgeting for at least one main street block and eight basic blocks’ worth of improvement. This is estimated to amount to \$1,007,500 over five years, or \$201,500 per year. Under that budget, the only option that covers those costs is Option2, square footage per lot options.

	Rate	Zone A	Zone B	Zone C
<b>Option 1: Assessed Value</b>	\$0.50	\$66,370.00	\$57,409.00	\$18,236.00
	\$0.75	\$99,555.00	\$86,113.50	\$27,354.50
	\$1.00	\$132,740.00	\$114,818.00	\$36,473.00
	\$1.25	\$165,925.00	\$143,522.50	\$45,591.50
<b>Option 2: Square footage of the lot</b>	\$0.02	\$144,688.90	\$131,829.98	\$17,781.19
	\$0.05	\$361,722.24	\$329,574.96	\$44,452.98
	\$0.10	\$723,444.48	\$659,149.92	\$88,905.96
	\$0.15	\$1,085,166.72	\$988,724.88	\$133,358.94
	\$0.25	\$1,808,611.20	\$1,647,874.80	\$222,264.90
<b>Option 3: Square footage of the business</b>	\$0.02	\$8,070.98	\$6,333.20	\$3,335.76
	\$0.05	\$20,177.45	\$15,833.00	\$8,339.40
	\$0.10	\$38,337.00	\$30,083.00	\$15,845.00
	\$0.15	\$57,505.50	\$45,124.00	\$23,767.50
	\$0.25	\$95,842.50	\$75,206.00	\$39,612.50
<b>Option 4: Square footage of the frontage</b>	\$0.50	\$13,650.17	\$10,784.01	\$4,521.37
	\$1.00	\$27,300.35	\$21,568.01	\$9,042.74
	\$3.00	\$81,901.04	\$64,704.03	\$27,128.21
	\$5.00	\$136,501.73	\$107,840.05	\$45,213.68

While these charts cover a wide range of pricing options, this does not portray the lowest tax seen in case studies. The table above has added the lowest tax rate for square footage observed for reference. Both Salem and Cottage Grove use systems similar to Option 2, square footage of the lot, but with a tiered system where the lower tier is charged \$0.02. If Troutdale wished to implement a tiered system based off of the square footage of the lot with \$0.05 in Zone C (the commercial business district) and \$0.02 in Zone B (the commercial zone), it would result in a total of \$176,283 annually. While this would require a reevaluation of expenditures, Troutdale staff might be able to build upon our analysis for a more accurate representation of that option and may consider it when thinking about implementing such an EID program.

While \$0.25 was the highest rate observed, many in Oregon were much lower and in the range of \$0.02-\$0.07 per square foot. Depending on the political buy-in of the community, reevaluating expenditures and taking that route might be more beneficial.

Another consideration is using a BID as a supplement to an EID program, like Cottage Grove and McMinnville. For example, if Troutdale used a tiered system as described above (\$0.05 in Zone C and \$0.02 in Zone B for a total of \$176,283 annually) and added a BID like Cottage Grove at \$50 per business, that would add an additional \$12,600 annually to make for a total of \$188,883. There would still need to be reevaluation for expenditures at this rate, but this provides an option for additional revenue.

## Evaluation Criteria

Our teams developed and measured four funding options against a set of criteria encompassing horizontal equity, vertical equity, administrative efficiency, and neutrality. The definitions for each evaluation criteria and four funding options are discussed below.

### **DEFINITIONS OF EVALUATION CRITERIA:**

**Horizontal Equity:** Taxes that rank highly in equity impose costs and distribute resources fairly. Horizontal equity ensures that those in comparable positions pay the same or similar rate.

**Vertical Equity:** Those with a higher ability to pay, pay more.

**Administrative Efficiency:** A tax that is efficient is not costly to administer in terms of effort, money, or time and generate more revenue than it costs to collect.

**Neutrality:** A neutral assessment does not affect the decisions or distort the behavior of a community.

**Productivity:** A productive tax should produce stable and enough revenue to meet desired levels of expenditures.

**Certainty:** The rules of taxation should be clearly stated and evenly applied.

Source: Lewis, 2020

### **OPTION 1: EID BASED ON ASSESSED VALUE OF THE PROPERTY**

**Description:** This option levies a fee on property owners based on the assessed value of their commercial parcels. Using data provided by City of Troutdale officials, the total assessed value for commercial parcels amounts to \$139,726,480. A fee based on the assessed value of a commercial parcel to help fund an EID cannot exceed 1% of the total value of that property.

**Equity:** This option ranks High in horizontal equity because those with similarly assessed values will pay similar fees. By the same measure, it ranks Moderate for vertical equity because it is possible that two property owners owning parcels with similarly assessed value may not have the same income.

**Administration:** In terms of administration, this option may be the most difficult. While it is rated as Moderate, assessing property can be a massive undertaking. Although the city already has the necessary information to immediately levy a fee based on assessed value, in order to periodically update these values or to reassess to get accurate estimates for the EID, administrative resources may be strained.

**Productivity:** An EID based on assessed value ranks Moderate/High in productivity. Depending on how much the services demanded cost, the fees may not be enough to cover all expenditures. However, the amount of services can also be measured against how much property in the Town Center is worth.

**Neutrality:** This option ranks Moderate in terms of neutrality. It is possible that property owners may leave the district if they do not desire to pay an extra fee.

### **OPTION 2: EID BASED ON FLAT RATE OF THE LOT**

**Description:** If the City of Troutdale were to implement this type of funding mechanism, the fee for property owners would be based on the square footage of their commercial parcels located in the Town Center. Based on the data from City officials, this amounts to 403,549 square feet.

**Equity:** In terms of equity, this option ranks High in horizontal equity because similarly sized parcels will pay similar rates. However, this option ranks Low in vertical equity because similar size does not necessarily equate to similar revenues. For example, a very lucrative business may be small but may pay much less than a large store with small revenue streams.

**Administration:** This option ranks Moderate/High for administrative efficiency and feasibility because the city already has information regarding the square footage of each commercial parcel in the Town Center. However, depending on the last time each parcel was measured, it is possible that the city may have to re-measure each parcel to accurately estimate how much a property owner must pay.

**Productivity:** An EID based on square footage ranks Moderate/High in productivity. While a fee based on square footage should equate to a commensurate amount of services, it is possible that the number of small businesses is just slightly higher than larger businesses in which case the revenues may not be satisfactory to cover all services for the larger businesses.

**Neutrality:** This option ranks Moderate in terms of neutrality. It is possible that the extra charge may affect property owners' behavior, but it is less likely than a surcharge on business owners.

### **OPTION 3: EID BASED ON FLAT RATE OF SQUARE FOOTAGE OF STRUCTURE**

**Description:** This revenue option requires property owners to pay a flat fee per square footage of the structure.

**Horizontal Equity:** Rated High because each square footage is assessed using a similar rate.

**Vertical Equity** Rated Low because even though parcels are charged by an established rate, there is some concern about whether the businesses further from the Town Center will equally benefit from the Main Street projects.

**Administrative Efficiency** is rated Low/Moderate because it is implemented at a standard rate and meets the city's expenditure needs. However, the square footage of the structure must be measured and frequently updated by the city.

**Neutrality** is rated Moderate since it is implemented over a broader tax base.

#### **OPTION 4: EID BASED ON FLAT RATE OF FRONTAGE**

**Description:** Implement an EID with an established rate based on frontage length per foot.

**Horizontal Equity** is rated High as it implements a flat fee that corresponds to the frontage length of each parcel.

**Vertical Equity** is rated High because properties with greater store frontage are likely to benefit more from EID projects than those with less store frontage, and therefore are to receive the heavier burden of fees.

**Administrative Efficiency** is rated Low/Moderate because a flat fee is applied. However, this option does not provide sufficient revenue to meet the estimated expenditures, as displayed by measuring three different fee rates in Figure 5.

**Neutrality** is rated Moderate/High because it encourages increased consumer behavior due to the updated aesthetic of downtown frontage. Implementing a flat rate makes this option more neutral than zone-based fees.

#### **OPTION 5: BID BASED ON BUSINESS LICENSE SURCHARGE**

**Description:** This revenue option establishes a surcharge on the City of Troutdale's business license fee, which is renewed annually along with the issued license. All registered businesses within the designated geographies are required to pay the established surcharge. Currently, there are 162 registered businesses in the town's center.

**Horizontal Equity** is rated High because each business would be charged the same fee rate.

**Vertical Equity** is rated Low because each business, regardless of generated revenue or workforce size, would be required to pay the same rate. Additionally, the inaccessibility of business data, such as number of employees and annual revenue, hinders our ability to evaluate the feasibility of this option. This includes the assessment of a business license fee rates. However, our property estimates within downtown Troutdale allows us to produce confident rates within certain downtown geographical zones for our proposed EID options as described later in this section.

**Administrative Efficiency** is rated Moderate/High due to the ease of administering a business license surcharge. However, we estimate that establishing a surcharge would not generate enough revenue to meet the City of Troutdale's estimated Main Street expenditures and would force the city to seek revenue elsewhere.

**Neutrality** is rated as Low because the city's business license fee, at \$80, is already higher than neighboring localities. Requiring a surcharge fee in addition to the business license fee could discourage existing and new businesses from operating in the City of Troutdale. Furthermore, implementing a business surcharge fee is inefficient because current businesses do not operate at a large enough scale to which revenues would be efficient in fulfilling Troutdale's development goals.

### **OPTION OVERLAY: TIERED SYSTEM- EITHER EID OR BID**

**Description:** For any of the five options discussed, there is an option to make the system tiered based on the location of the property. This would mean there is a higher priority area (a central downtown) as well as surrounding areas that pay less than the primary downtown area.

**Horizontal Equity:** Rated High because the tiers of the system puts the different businesses in comparable positions, so those who pay the most get the most direct benefit. The pay into the tax is comparable to the benefits received.

**Vertical Equity:** Rated High for a tiered system as the purpose of it is to ensure those in the central downtown areas, which would see more direct improvement efforts, would pay higher taxes than those who would see more indirect benefits. This would help ensure that those who have the ability to pay more taxes contribute more than those who are not.

**Administrative Efficiency:** Administrative efficiency would mostly be determined by whichever system this overlay was applied to. However, this would mean more work would have to be put forth into establishing those tiers and where they were. For this, administrative efficiency is rated Low/Moderate.

**Neutrality:** Neutrality is rated High for a tiered system as it allows for people to choose between paying higher taxes to receive more direct benefit vs. paying less and the benefits being more indirect. Rather than forcing opinions in or out of the area directly, it is more an evaluation on values.

## Student Group Recommendations

In this class, each of the three groups had a different collection of case studies and therefore had a different perspective and set of recommendations based on the examples they observed.

Group A studied Newport, OR, McMinnville, OR, and Durham, NC. Their analysis focused on a BID option, an EID by zone rating option, and EID flat rate options based on square footage of the structure and on frontage. Analyzing these aspects, they came up with the following recommendation:

- **Implement an EID within Commercial Zone (Geography B) using a flat fee based on frontage length per feet.** The optimal rate we recommend is \$5 per square foot, which results in an average annual charge of \$330 for property owners in the designated zone. This value of \$330 was concluded based on an averaged measurement of downtown frontage.

Group B studied Cottage Grove, Bend, and Hillsboro, OR. Their analysis took the structures of those three places and implemented it using Troutdale data. This meant there was a high focus on the impact of tiered systems, as well as looking at EIDs with systems based on assessed value, square footage of the business, and square footage of the lot. They briefly discuss BIDs and spent more significant time analyzing which EID options would be financially successful even if there was only 67% participation (due to needing a third of businesses to opt out in order to make an EID void). Because of their focuses of analysis, their recommendation is as follows:

- **Implement an EID using a two-tiered approach using a flat fee based on the square footage of the lot.** Charging more to the central business district that stands to gain the most benefit from improvements is fair. Including the other commercial zones in another tier creates flexibility in the placement of future signing and coordination of events. Including other commercial zones in the EID gives administrators the ability to place signing near the highway that benefits all commercial areas.

Group C studied Miami, FL; Oregon City, OR; Salem, OR; and Corvallis, OR. Their analysis focused on the options of EID based on assessed value, an EID based on square foot of the lot, and a BID. Their analysis structure and observations from case studies led to the following recommendation:

- **Implement an involuntary EID with a taxable rate of \$0.75 per \$1,000 of assessed commercial value in Zone A, which encompasses the entire Town Center.** This option appears to be the most amenable to property owners and the most likely to meet the city's goals, while achieving the highest degree of vertical equity. This rate is the highest revenue generating option that falls inside the property tax precedent set by the City of Troutdale over the last 15 years, thus making it the most

politically viable. The estimated \$99,550 generated annually by this option would, according to our expenditure analysis, cover the refurbishment of approximately **one Main Street block and seven or eight Minor blocks** (notwithstanding service fees). Making the payment of the fee involuntary addresses many of the market failures associated with voluntary buy-in programs, such as the free rider problem and moral hazard. Involuntariness would also generate a greater quantity and assurance of revenue.

Based on observations made while observing case studies, the student groups also made related recommendations to keep in mind while establishing an EID/BID for Troutdale.

- **Determine whether the EID is voluntary or involuntary.** Regardless of the decision, the City of Troutdale should ensure the EID will generate enough revenue to support its goals, and then promulgate an ordinance. The ordinance should describe the EID's structure, implementation, fee and fee calculations, and processes for proposing changes and/or opting out of the EID (if allowed by the city).
- **Reassess the EID after three years to analyze the benefits of implementation and to evaluate the value of the designated properties within the geographic boundaries.** The reassessment will be a good opportunity to decide whether current EID rates are sufficient or should be adjusted based on funding needs or political climate. Reassessing the rates can also serve as a mechanism to garner feedback from property owners, business owners and residents to gauge the success of the EID.
- **BID during current economic struggles would not be beneficial.** Due to the impacts of COVID-19, Putting further stress on the businesses would be more likely to hurt businesses than to help the district.
- **Consider developing a streetscape/revitalization plan.** Troutdale has highlighted various design-based projects that are desired- but the specifications of these design projects are vague. Establishing a plan could better provide exact costs and expenditures for those design projects.
- **Prioritize funding towards community outreach in first years.** A vital part of a healthy Main Street Organization is volunteer engagement and public outreach. Ensuring that the design proposals are in line with the local population is important to the success of a Main Street program. Providing that public-buy in and engagement first can be more productive in the first few years of a Main Street Program rather than simply fulfilling design projects. Ensuring that property owners are included in all decisions. While the city plans to manage the EID initially, it is important not to alienate or discount the wishes of affected property owners. Equally important is working with business owners will also be imperative as they are inexorably connected with any future improvements and alterations.



## **Findings**

After compiling and comparing all of the options considered, this report presents findings for the Troutdale staff to consider while establishing an EID/BID program.

- **The only option out of the five options that reaches the \$201,000 annual expenditure goal is Option 2: EID based on square foot of the lot.** Troutdale staff should verify that these expected expenditure estimates are accurate. If staff find that this is inaccurate, there might be other options in the data given.
- **A BID alone is not reasonable for Troutdale.** For the goals that Troutdale has established, a business surcharge would require an unreasonable cost to individual businesses. It is still an option as additional revenue, but not as the sole source.
- **There is an infinite number of combinations for funding options available.** Considering that there are options to combine EID and BID programs, there are unlimited ways to connect the options available. While the student groups can provide some recommendations based on what revenue options can meet estimated expenditure, we can not determine which of these options will have more buy-in with the community. Hopefully this data set is a starting place for staff to determine which funding option is most beneficial for their program.
- **Given the size of Troutdale, looking at and implementing methods employed by the Main Street programs in Oregon cities like Cottage Grove, Oregon City, and McMinnville are encouraged.** Some of the case studies observed are in very different positions than Troutdale when it comes to population and economic climate. Cottage Grove and McMinnville however, are both smaller Oregon cities that have a very good reputation in the Oregon Main Street Program. Out of the case studies, Bend, Cottage Grove, Oregon City, and Salem have been designated as Oregon Heritage All-Star Communities. Considering similarity of the cities and the methods that worked for them should be considered when finalizing an EID/BID plan for Troutdale.

## **Conclusion**

While the three student groups had different recommendations due to the data available to them and varying analysis styles, there is one recommendation shared between the three.

Given that our collective expenditure estimates were taken from different sources, those vary as well, meaning that the different analyses and recommendations on which options Troutdale should pick are biased by those estimates. As the EID/BID options are being considered, representatives of Troutdale may have more accurate representations of expenditures that may more accurately inform which of the options presented here can cover those expenditure needs. Hopefully the data and insight provided in this report will help the City of Troutdale to choose an EID/BID funding option that best reaches their expenditure goals as well as best suits their community.

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# Appendix A

## Geography

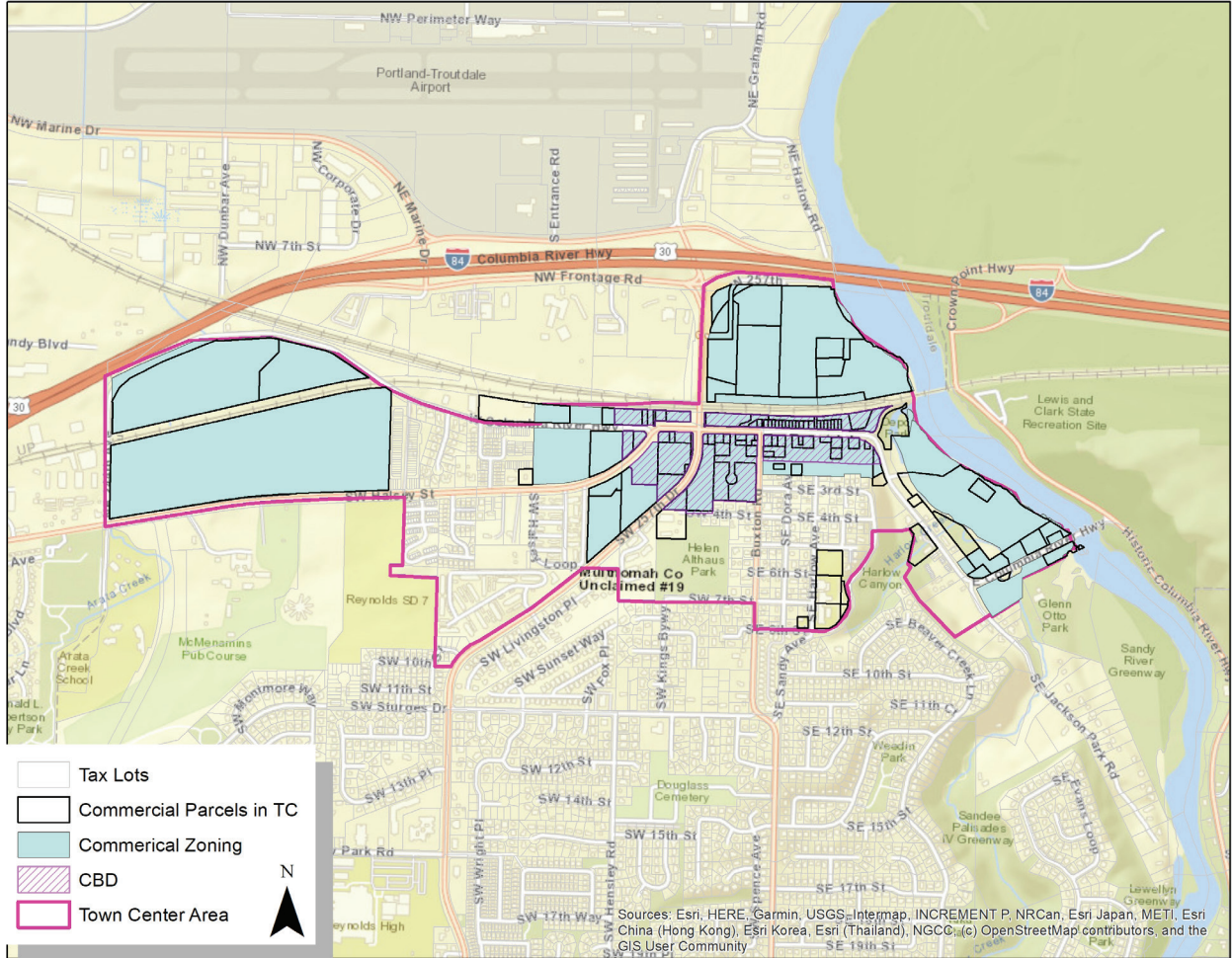


FIG. A1

Figure A1 displays Troutdale’s Town Center area broken into the proposed geographic regions. Geography A is outlined in pink; Geography B includes the shaded green, blue, and purple parcels; Geography C includes the purple parcels of Troutdale’s Central Business District.

The map was created by Prof. Rebecca Lewis, PhD. utilizing data from the City of Troutdale.

# Appendix B

## Assumptions

Figures displayed in this portion of the appendix were all created by the authors of this memo based on data gathered and disseminated by the City of Troutdale and Prof. Rebecca Lewis, PhD.

	Geography A	Geography B	Geography C
	Town Center	Commerical Zones in Town Center	CBD in Town Center
Number of Commerical Parcels	113	98	70
Acreage (commercial parcels)	166	151	20
Square Footage of Structure (commercial parcels)	403,549	316,660	166,788
Frontage (commercial parcels) in feet	27,300	21,568	9,043
Total Assessed Value (commercial parcels)	\$139,726,480	\$120,861,560	\$38,392,840
Commercial Parcels with Troutdale Owners	32	27	19
Commercial Parcels with owner same address	15	14	11
Number of Businesses	162	148	104
Acreage (all land area)	348.50	181.16	27.20

FIG. A2

Figure A2 outlines City of Troutdale commercial property owner data.

# Appendix C

## Troutdale's Downtown Goals

Troutdale's goals summarized from the 2020-2040 Town Center Plan.

### SOCIAL

- **Youth and Families:** Encourage diversification of businesses, addition of civic uses, and investment in recreational facilities to improve the family-friendliness of the District
- **Seniors and Accessibility:** Promote live-in-place opportunities through expansion of retail and human services in addition to investments in housing, transportation, and ADA compliance.
- **Education:** Expand continuing education possibilities and tie them with entrepreneurship.
- **Housing:** Allow for a range of housing types and price points, but with a preference toward quality and complimentary development while encouraging homeownership and civic pride.
- **Public Safety:** Begin efforts to discourage vagrancy and improve lighting in the District.
- **Hazard Mitigation:** Ensure a safe built environment through enforcing existing codes while promoting best practices in structural siting, material usage, and property upkeep.

### ECONOMIC

- **Market Positioning:** Tourism alone will not sustain downtown Troutdale. Downtown must increase attractiveness for residents and nearby residents, particularly east of the Sandy River.
- **Commercial Services:** Diversification of retail is critical, and certain services must be equipped to have both a physical and online presence to succeed.
- **Economic Development:** An entity committed to downtown is expected to take a leading role in terms of recruiting new business and supporting entrepreneurs and existing businesses.

### RESILIENCY & FUTURE TRENDS

- **Demographic Changes:** Troutdale will become more racially diverse over time. The Town Center should strive to remain appealing to all.
- **Affordability and Equity:** The Town Center can provide a balance that allows people of all incomes and socio-economic statuses to live in, work in, and enjoy the district
- **Shared Economy / Micro-Retail:** Flexibilities should be afforded to allow these types of commerce to exist in the District along with standard commercial services.
- **Automation:** Future investments in infrastructure should be flexible and adaptable in considering how autonomous vehicles may change consumer needs or behaviors.
- **Energy Conservation:** Consider financial incentives for new development.
- **Green Infrastructure:** Consider methods to increase implementation of green infrastructure.
- **Climate Change:** Establish a climate resiliency plan that ties into hazard mitigation plans.

## RESOURCES

- **Natural Resources and Environment:** The District’s natural resources are a major factor in the desirability of the area and should not be fundamentally altered by development.
- **Recreation and Open Spaces:** Park investments should be made to increase family-friendly activities while providing resources to also conserve more sensitive natural areas.
- **Public Facilities and Services:** Additional civic uses should be brought into the District, but potentially consolidated to limit costs and improve service delivery.
- **Scenic and Historic Areas:** Troutdale should consider new historic landmark designations, conserving historic resources, and establish viewsheds or easements to protect scenic areas.
- **Community Design and Architecture:** More consistency in design is sought in public areas, along with a higher level of design review and oversight for larger private development.

## LAND USE

- **Conservation Areas:** Established standards should continue to limit development impact.
- **Existing Built Environment:** Troutdale’s scale and structures contribute to its small-town feel. New development should respect this and seek to blend harmoniously to what’s already here.
- **Adaptive Reuse:** Troutdale risks losing places that have contributed to its history. The adaptive reuse of certain buildings may provide authenticity, creativity, and interest to a development.
- To support the above efforts, **opportunity sites** should be established (see next page).

## TRANSPORTATION & MOBILITY

- **Vehicular:** Troutdale will not “declare war” on cars, understanding that personal vehicles provide convenience in a suburban community as they evolve towards automation
- **Parking & Loading:** Parking problems are not just a supply issue (not enough spaces). Parking demand must be considered as well, with loading areas will become increasingly important.
- **Active (Bicycle and Pedestrian):** People are more comfortable with biking and walking when they are separated from traffic in higher-speed corridors.
- **Alternative:** The District’s size and geography make it worthwhile to consider other ways to get around town, including micro-transit, electric-assisted vehicles, and golf carts.
- **Transit:** Though regional transit efficiency is limited; localized “last mile” transit opportunities in the District may emerge to compliment and improve the overall system.



# Appendix D

## Oregon Main Street

Apart from the national Main Street, in Oregon, the Department of Parks and Recreation provides helpful information on Oregon Main Street, a Coordinating Program for Main Street America (Oregon Main Street, n.d.). Oregon Main Street provides training and technical assistance to communities participating in the Main Street Track of the Oregon Main Street Network and provides access to the Oregon Main Street Revitalization Grant, which can be used for building improvements projects. To participate in the Oregon Main Street Network, there are two tracks communities can take. The Main Street Track is for those who wish to use the Main Street Approach. There are three tiers in this track for communities to advance through at their own pace. These include:

- Performing Main Street;
- Transforming Downtown; and
- Exploring Downtown.

Communities participating in the Main Street Track must have a traditional downtown or neighborhood commercial district, which is defined as a group of 20 or more contiguous commercial parcels with buildings of historical or architectural significance. Additionally, the area must be zoned, planned, built, or used for commercial purposes for more than 50 years. More information on what a traditional downtown must include is listed on the Oregon Main Street website. Lastly, applicants for this track are often independent nonprofit organizations focusing on downtown areas.

The other track is the Associate level for communities that are not ready or do not quite fit into the Main Street Approaches. Often applicants for this track include local government but nonprofits may also apply for this track.

Two successful downtown associations that can be further explored in the case studies listed under Appendix B, are Oregon City's Downtown Oregon City Association (DOCA) and Corvallis' Downtown Corvallis Association (DCA). Both of these associations are nonprofits that help support the revitalization, preservation, and enhancement of the downtown area. In terms of administration, DOCA, the first Main Street Organization in Oregon, collects and administers the revenues from Oregon City's EID. The organization is managed by a volunteer board of directors, mostly composed of representatives from businesses within the EID. There are eight board members who guide and manage the organization. Their operations are supported by paid staff including an executive director, operations manager, and an events and placemaking manager. DOCA offers grants for aesthetic improvements in the downtown area and advocates for policies and other programs that benefits businesses within its district and recruit more businesses to the area. Similarly, in Corvallis, the DCA administers the EID and has 11 board members and an executive director.

The following are the prerequisites and requirements for the three different stages of Oregon Main Street (OMS). Bolded are the aspects that directly impact budget. From the OMS Handbook 2020.

## EXPLORING DOWNTOWN

Prerequisites	Requirements
<ul style="list-style-type: none"><li>• Host a community meeting to share an overview of the Main Street Approach® to get the city, local partners, and community members to support establishing a main street effort.</li><li>• Encourage staff, steering committee, and other volunteers to attend Main Street trainings, read information, and watch introductory webinars as provided by Oregon Main Street.</li><li>• Establish a steering committee or Board of Directors. This is either an informal or formal group of community members including local professionals, business owners, city/town staff, etc.</li></ul>	<ul style="list-style-type: none"><li>• Provide a local contact person to serve as the primary point of communication between the local organization and OMS.</li><li>• Form a local main street group within the first year of participation in the OMS Network if one is not already formed.</li><li>• Attend at least one of the OMS sponsored Network training, conference, webinar, or workshop each year.</li><li>• Have an approved main street district boundary and map.</li></ul>

## TRANSFORMING DOWNTOWN

Prerequisites	Requirements
<ul style="list-style-type: none"> <li>• Formalize your local program structure. This is typically a 501c3 or 501c6 independent nonprofit organization focused solely on downtown revitalization efforts. Talk to Oregon Main Street staff if you are considering an alternate organizational structure.</li> <li>• Have an active board of directors. The board of directors is a diverse and representative group who are selected for their skills, connections, and knowledge. They should have enough time to commit and be passionate about Main Street and its mission.</li> <li>• Establish a mission statement. The mission should be created by the board of directors. It should clear, concise, and explain who the local Main Street program is and what they do.</li> <li>• Have a paid executive director that provides staff support to the local Main Street program for a minimum of sixteen hours per week. Initially, this can be a volunteer position for communities under 5,000 in population.</li> <li>• Identify and have approved by OMS staff a map of your district boundary or primary focus area.</li> <li>• Develop a basic business inventory of your Main Street district – including business types, contact information, etc.</li> <li>• Develop a basic building/property inventory of your Main Street district – including ownership patterns, building conditions, vacancies, building square footage, use, average rents, etc.</li> <li>• Work on developing historic building inventories and identifying historic assets.</li> </ul>	<ul style="list-style-type: none"> <li>• Follow the Main Street Approach®.</li> <li>• Have support and participation of the local government.</li> <li>• Attend quarterly Main Street trainings and Network meetings.</li> <li>• Host an annual visit by Oregon Main Street staff.</li> <li>• Sign a biennial Participation Agreement with Oregon Main Street.</li> <li>• Sign an annual Sublicense Agreement to use the Main Street America™ brand.</li> <li>• Submit quarterly reports and reinvestment statistics.</li> <li>• Submit an annual work plan demonstrating activity in each of the Four Points of Main Street.</li> <li>• Present an annual report to the local elected body.</li> <li>• Host an annual board retreat.</li> </ul>

## PERFORMING MAIN STREET

Prerequisites	Requirements
<ul style="list-style-type: none"> <li>• Have a formal local program organizational structure. It is highly recommended that this is an independent, nonprofit 501c3 or 501c6 organization. Other organizational structures must have the approval of Oregon Main Street staff.</li> <li>• Have an active board of directors. The board of directors is a diverse and representative group who are selected for their skills, connections, and knowledge. They should have enough time to commit and be passionate about Main Street and its mission. The board of directors will be the main advocates for the program, help with strategic visioning, maintain public relations, and sustain revenue.</li> <li>• Has broad-based community support for the commercial district revitalization process, with strong support from both the public and private sectors.</li> <li>• Has developed vision and mission statements relevant to community conditions and to the local Main Street program’s organizational stage.</li> <li>• Has a comprehensive Main Street work plan.</li> <li>• Possesses an historic preservation ethic.</li> <li>• Has an active board of directors and committees.</li> <li>• Has an adequate operating budget.</li> <li>• Has a paid, professional executive director (minimum requirement is part-time for communities under 5,000, full-time for communities over 5,000).</li> <li>• Conducts program of ongoing training for staff and volunteers.</li> <li>• Reports key revitalization statistics.</li> <li>• Current member of the Main Street America™ Network.</li> </ul>	<ul style="list-style-type: none"> <li>• Follow the Main Street Approach®.</li> <li>• Have support and participation of the local government.</li> <li>• Attend quarterly Main Street trainings and Network meetings.</li> <li>• Attend additional trainings.</li> <li>• Host an annual visit by Oregon Main Street staff.</li> <li>• Sign a biennial Participation Agreement with Oregon Main Street.</li> <li>• Sign an annual Sublicense Agreement to use the Main Street America™ brand.</li> <li>• Submit quarterly reports and reinvestment statistics.</li> <li>• Submit an annual work plan demonstrating activity in each of the Four Points of Main Street.</li> <li>• Present an annual report to the local elected body.</li> <li>• Host an annual board retreat.</li> <li>• Provide mentorship to Transforming Downtown and Exploring Downtown level communities.</li> </ul>



FIG. A3

Four points of the Main Street America Approach, 2020

Source: Main Street America <https://www.mainstreet.org/mainstreetamerica/theapproach>

## Appendix E

### EID/BID Statutes

The following is a list and summary of statutes relevant to EID/BID development in Oregon. When looking at options for Troutdale, these were taken into consideration.

#### **223.114**

- Assessments cannot exceed 1% of assessed value real market value (RMV)
- Cannot be within non-commercial/industrial zones
- Cannot levy on residential property or portion of a residential structure

#### **223.117 EID CREATED BY CITY ORDINANCE AND MUST INCLUDE:**

- Includes description of the improvement project (main street)
- Contains estimate of the cost and formula for apportioning costs
- Description of economic boundaries
- Length of the assessment, max 5 years
- Provision for affected property owners to be notified by mail or personal delivery
  - Announce the project
  - Announce the assessment
  - Must include stated time for public hearing
- A public hearing scheduled for not sooner than 30 days after the mailing or delivery of notices
- Note that assessments and the project will be terminated if 33% of affected property owners submit written objections at the public hearing

**223.118**

- Owners that object won't be assessed
- New owners of property that wasn't assessed can choose to pay in
- New owners of property that is assessed continues the payment
- The EID can be extended beyond its initial term with another ordinance

**223.119**

- An advisory committee isn't required, appointment of affected property owners is recommended
- An existing association can agree with the city to provide the improvements (like in Bend)

**223.122**

- Existence of local improvement districts or urban renewal districts has no effect on creating an EID

**223.124**

- Renewing the EID requires notices and the option for owners to opt out again
- The process to renew is the same as the formation of an EID

**223.129**

- The funds from an EID are restricted to purpose defined in the forming ordinance
- Spending the funds for other purposes makes that official civilly liable

**223.144 – 223.161**

- Fundraising process for an EID using a business license fee are like an assessment on property owners EXCEPT those that object must still pay if 33% of businesses do not submit written objections at the public hearing.

# Appendix F

## Expenditure Estimates

Given that this report is the synthesis of three different reports, there were different ways to estimate expenditures other than the one highlighted in this report. This appendix goes into the other ways the student groups analyzed potential expenditures.

The tables below outline expenditure calculations for each of the three geographies: Town Center, Commercial Zones and the Central Business District.

### TABLE COLUMN DETAILS:

**Expenditure:** This column lists the expenditure category assessed.

**Descriptions:** This column provides a description of the expenditure.

**Ratio:** This column shows a ratio for expenditures. The first term in the ratio represents the number of expenditures. The second term in the ratio refers to the number of businesses.

**Unit Cost:** This column shows the estimated cost of an expenditure category (i.e., bench, picnic table, etc.).

**Units:** This column shows how many expenditure units are required for the entire geographic area. This number is derived by taking the total number of businesses in a region and dividing it by the second term of the ratio found in the "Ratio" column. For example, to calculate how many benches are needed for the Town Center, the 162 (businesses) is divided by 7, yielding 23 units.

**Total Cost:** This column shows the estimated total cost of procuring the number of units listed in the "Units" column. Total Costs = Unit Costs x Units

City of Troutdale Expenditures for the Town Center (Geography A - 162 Businesses)					
Expenditure	Description	Ratio	Unit Cost	Units	Total Cost
1.0 FTE/MSO	N/A	N/A	\$120,000	1	\$120,000
Bench	Wood Bench	1 to 7	\$960	23	\$22,080
Picnic Table	Wood Picnic Table	1 to 10	\$155	16	\$2,480
Planter	Wood Planter (Width Not to Exceed 30")	1 to 3	\$300	54	\$16,200
Streetlight	Spring City - Edgewater ALMEDM-LE	1 to 5	\$400	32	\$12,800
Streetlight Pole	Spring City - PSEDG-16-12 00	1 to 5	\$1,000	32	\$32,000
Streetlight Junction Box	Spring City - ER121206-SC	1 to 5	\$855	32	\$27,360
Street Sign	Aluminum Street Sign	1 to 8	\$39	20	\$780
Trash Cans	Steel Trash Can (32-27 Gallons)	1 to 5	\$566	32	\$18,112
Tree Enclosure	Tree Grate	1 to 3	\$326	54	\$17,604
					<b>\$269,416</b>

FIG. A4



City of Troutdale Expenditures for the Commercial Zones in the Town Center (Geography B - 148 Businesses)					
Expenditure	Description	Ratio	Unit Cost	Units	Total Cost
1.0 FTE/MSO	N/A	N/A	\$120,000	1	\$120,000
Bench	Wood Bench	1 to 7	\$960	21	\$20,160
Picnic Table	Wood Picnic Table	1 to 10	\$155	14	\$2,170
Planter	Wood Planter (Width Not to Exceed 30")	1 to 3	\$300	49	\$14,700
Streetlight	Spring City - Edgewater ALMEDM-LE	1 to 5	\$400	29	\$11,600
Streetlight Pole	Spring City - PSEDG-16-12 00	1 to 5	\$1,000	29	\$29,000
Streetlight Junction Box	Spring City - ER121206-SC	1 to 5	\$855	29	\$24,795
Street Sign	Aluminum Street Sign	1 to 8	\$39	18	\$702
Trash Cans	Steel Trash Can (32-27 Gallons)	1 to 5	\$566	29	\$16,414
Tree Enclosure	Tree Grate	1 to 3	\$326	49	\$15,974
					\$255,515

FIG. A5

City of Troutdale Expenditures for the Central Business District in the Town Center (Geography C - 104 Businesses)					
Expenditure	Description	Ratio	Unit Cost	Units	Total Cost
1.0 FTE/MSO	N/A	N/A	\$120,000	1	\$120,000
Bench	Wood Bench	1 to 7	\$960	14	\$13,440
Picnic Table	Wood Picnic Table	1 to 10	\$155	10	\$1,550
Planters	Wood Planter (Width Not to Exceed 30")	1 to 3	\$300	34	\$10,200
Streetlight	Spring City - Edgewater ALMEDM-LE	1 to 5	\$400	20	\$8,000
Streetlight Pole	Spring City - PSEDG-16-12 00	1 to 5	\$1,000	20	\$20,000
Streetlight Junction Box	Spring City - ER121206-SC	1 to 5	\$855	20	\$17,100
Street Sign	Aluminum Street Sign	1 to 8	\$39	13	\$507
Trash Can	Steel Trash Can (32-27 Gallons)	1 to 5	\$566	20	\$11,320
Tree Enclosure	Tree Grate	1 to 3	\$326	34	\$11,084
					<b>\$213,201</b>

FIG. A6

Figure A6 depicts the expenditure estimates and calculations for the City of Troutdale’s Central Business District.

**EXPENDITURE ESTIMATES BY CATEGORY**

**One FTE/Main Street Organization**

Position One

Georgetown D.C.: [GMS-Program-Manager-Job-Description.pdf](#) (ncph.org)

Estimated Pay: \$50,000 - \$60,000

Position Two

Bainbridge Island, WA: [Executive Director - Bainbridge Island, WA 98110](#) - Indeed.com

Estimated Pay: \$60,000 - \$70,000

Position Three

Ellensburg, WA: [Executive Director - Ellensburg, WA 98926](#) - Indeed.com

Estimated Pay: \$40,000 and \$60,000

**Streetlight**

Estimated Cost: \$400

Spring City Electrical: [Edgewater 34" Cast Aluminum Symphonic LED System | ALMEDM-LE](#) (springcity.com)

\*Three quotes are not provided for this piece of equipment; Spring City Electrical streetlights are prevalent throughout Troutdale. Spring City Electrical price quotes are only available via inquiry. An inquiry was made, and a response was not received. Estimates for Spring City Streetlight and Streetlight Poles are based on similar styles.

### **Streetlight Pole**

Estimated Cost: \$1000

Spring City Electrical: Edgewater 16" Base 12' Lamppost | PSEDG-16-12 00 (springcity.com)

\*Three quotes are not provided for this piece of equipment; Spring City Electrical streetlights are prevalent throughout Troutdale. Spring City Electrical price quotes are only available via inquiry. An inquiry was made, and a response was not received. Estimates for Spring City Streetlight and Streetlight Poles are based on similar styles.

### **Cast Iron Junction Box**

Estimate cost: \$855

Spring City Electrical: ER121206-SC - Cast Iron Junction Box — (springcity.com)

\*Three quotes are not provided for this piece of equipment; Spring City Electrical streetlights are prevalent throughout Troutdale.

### **Bench - Wood**

#### Quote 1

Estimate Cost: \$1240

Forever Redwood: <https://www.foreverredwood.com/ruth-wooden-bench.html>

#### Quote 2

Estimate Cost: \$339

Fast Furnishings: <https://www.fastfurnishings.com/5-Ft-Outdoor-Wooden-Garden-Bench-with-Armrests-p/e5ftgb199.htm>

#### Quote 3

Estimated Cost: \$1290

Forever Redwood: <https://www.foreverredwood.com/ti-ammo-benches.html>

### **Planters – Wood**

#### Quote 1

Estimated Cost: \$493.85

Planters Unlimited: Eureka Redwood Rectangle Planter (plantersunlimited.com)

#### Quote 2

Estimated Cost: \$300

Gardner's Supply Company: Cascade Tall Cedar Planter Box | Gardener's Supply

#### Quote 3

Estimated Cost: \$100

Home Depot: <https://www.homedepot.com/p/Leisure-Season-32-in-x-18-in-Cedar-Planter-Box-PB20012/204199298>

### **Tree Enclosures – Tree Grates**

#### Quote 1

Estimated Cost: \$343

The Park Catalog: <https://www.theparkcatalog.com/concrete-tree-grate-36l-x-36w-x-2-3-4t>

### Quote 2

Estimated Cost: \$200

Alibaba.com: [https://www.alibaba.com/product-detail/antique-square-street-cast-iron-tree\\_60150429744.html](https://www.alibaba.com/product-detail/antique-square-street-cast-iron-tree_60150429744.html)

### Quote 3

Estimated Cost: \$433

Grainger: GRAINGER APPROVED Black Tree Grate, Square Shape, Size: 4 ft x 4 ft - 8W945|TSB44 - Grainger

## **Trash Can – Steel** (sizes vary between 32 and 37 gallons)

### Quote 1

Estimated Cost: \$668

The Park Catalog: Plaza Steel Strap Trash Receptacle - 36 Gallon - The Park Catalog

### Quote 2

Estimated Cost: \$379

Global Industrial: Garbage Can & Recycling | Steel - Outdoor | Global Industrial™ Outdoor Metal Waste Receptacle, 36 Gallon | 237726BK - GLOBALindustrial.com

### Quote 3

Estimated Cost: \$649

WebstaurantStore: Ex-Cell Kaiser SC-2633 COF Streetscape Coffee Gloss 37 Gallon Round Classic Outdoor Trash Receptacle (webstaurantstore.com)

## **Picnic Table – Wood**

### Quote 1

Estimated Cost: \$179

ULINE: Wood Picnic Tables, Wooden Picnic Tables in Stock - ULINE

### Quote 2

Estimated Cost: \$137

Houzz: [https://www.houzz.com/pvp/universal-forest-106116-mca-picnic-table-kit-6-prpv-pv~38947636?m\\_refid=PLA\\_HZ\\_38947636\\_10577134232&device=c&nw=u&gclid=EAlaIqobChMI37XYqI2I7QIVjR-tBh1aAAhxEAQYGyABEgKze\\_D\\_BwE](https://www.houzz.com/pvp/universal-forest-106116-mca-picnic-table-kit-6-prpv-pv~38947636?m_refid=PLA_HZ_38947636_10577134232&device=c&nw=u&gclid=EAlaIqobChMI37XYqI2I7QIVjR-tBh1aAAhxEAQYGyABEgKze_D_BwE)

### Quote 3

Estimated Cost: \$149

Ace Hardware: [https://www.acehardware.com/departments/outdoor-living/patio-furniture/picnic-tables/8023322?x429=true&gclid=EAlaIqobChMI37XYqI2I7QIVjR-tBh1aAAhxEAQYBSABEgJJnvD\\_BwE&gclidsrc=aw.ds](https://www.acehardware.com/departments/outdoor-living/patio-furniture/picnic-tables/8023322?x429=true&gclid=EAlaIqobChMI37XYqI2I7QIVjR-tBh1aAAhxEAQYBSABEgJJnvD_BwE&gclidsrc=aw.ds)

## **Street Sign – Aluminum**

### Quote 1

Estimate Cost: \$23

RoadTrafficSigns: Personalized Street Signs | Custom Street Signs (roadtrafficsigns.com)

### Quote 2

Estimated Cost: \$78

SETON: <https://www.seton.com/custom-street-signs-js0110.html>

### Quote 3

Estimated Cost: \$15

BuildASign: <https://www.buildasign.com/SignReview.aspx?T=4F594A71566679424850356457376C64414E4D4E73513D3D>

# Appendix G

## Case Studies

### **MCMINNVILLE, OR**

#### **A Model Downtown**

McMinnville is known for having a model downtown area in the State of Oregon. Even amidst the 2008 recession, McMinnville's downtown experienced sustained growth and activity (ODOT, 2014). A trend in the 1980's for McMinnville, following a period of decline in downtown activity, focused on emphasizing business and community involvement, public-private partnerships, and low-cost street and building improvements. These investments allowed a revitalization of their downtown community promoting future sustained growth, even amidst economic downturns, specifically the Great Recession.

A key in the revitalization was the establishment of an Economic Improvement District in 1986. In partnership, the McMinnville Downtown Association was also established. The EID worked in tandem with MDA as MDA collected the funds accumulated through the EID from the City. Today the City administers a contract to the MDA to collect and disseminate the EID revenue with the goals of sustaining and enhancing downtown McMinnville as the cultural, retail, and professional heart of the community (McMinnville Downtown Association, n.d.).

#### **Enabling Statute**

Along with business license fee ordinances, the State of Oregon has guidelines for the establishment of an EID. ORS 223.144 allows a local council to raise business license fees to produce revenue for an EID. The council can bring its own motion for the EID or receive a petition for an EID signed by at least 33% of individuals conducting business within the proposed district. The fee is authorized as a surcharge and revenues may not be used for an improvement that does not primarily benefit those conducting business in the EID boundaries. Additionally, the statute stipulates land that is not zoned for commercial or industrial use cannot be included in the boundaries of the EID.

#### **Governing Structure**

As noted, the McMinnville Downtown Association has authorization from the City to operate the EID. This includes collecting the surcharges on business license fees from property owners within the community and utilizing these revenues to improve the district. The MDA is a nonprofit with membership from businesses, who pay into the nonprofit in order to receive membership benefits. Property owners of commercial property within the EID are those charged under the establishment of the EID and automatically receive membership benefits offered by the MDA. The benefits to members, both due-paying members and property owners paying a fee under the EID, include marketing, discounts on vendor participation in events, equipment rentals, and networking opportunities (McMinnville Downtown Association, n.d.).

While the City transfers the collected revenue to the MDA, the EID funds are collected into the City's Special Assessment fund. The fund primarily filters the EID revenue but also holds certain grants, including Community Development Block grants that support additional economic development projects supported by the city. The City in turn is responsible for the assessment of properties and setting rates for the EID.

While the hope would be to have clear management of the use of EID funds to ensure compliance with ORS 223.144, the operations of MDA limits that transparency. The EID revenue is lumped with the other revenue collected by the organization. The lack of clarity as to what revenue sources are being used for which activities makes it challenging to determine whether the funds of the EID are being spent on

economic improvement activities that “primarily benefit persons conducting business within the EID” (Economic Improvement District, ORS 223.144). Presumably, upon voting for the establishment of the EID, property owners approved of the improvements the EID would support but it is hard for said voters to observe the use of funds under the current tracking protocols the MDA uses for their resources and expenditures.

### **Geographic Boundaries**

Explicit geographic boundaries of the EID are not presented on the McMinnville City website or the MDA’s website. The 2021 approved budget for McMinnville discusses the general location of the EID as it relates to the pricing of fees. Additionally, the enabling statute states that land within the EID must be zoned as commercial or industrial. With these two guidelines of EID boundaries, and utilizing zoning maps of McMinnville, the map below was created as an approximation of the EID boundaries. The blue depicts what is defined in the budget as “zone 1” and the green depicts what is defined in the budget as “zone 2.” The differing rates set for the two zones are described in the next section.

Figure 1. EID Boundaries in Downtown McMinnville, Oregon

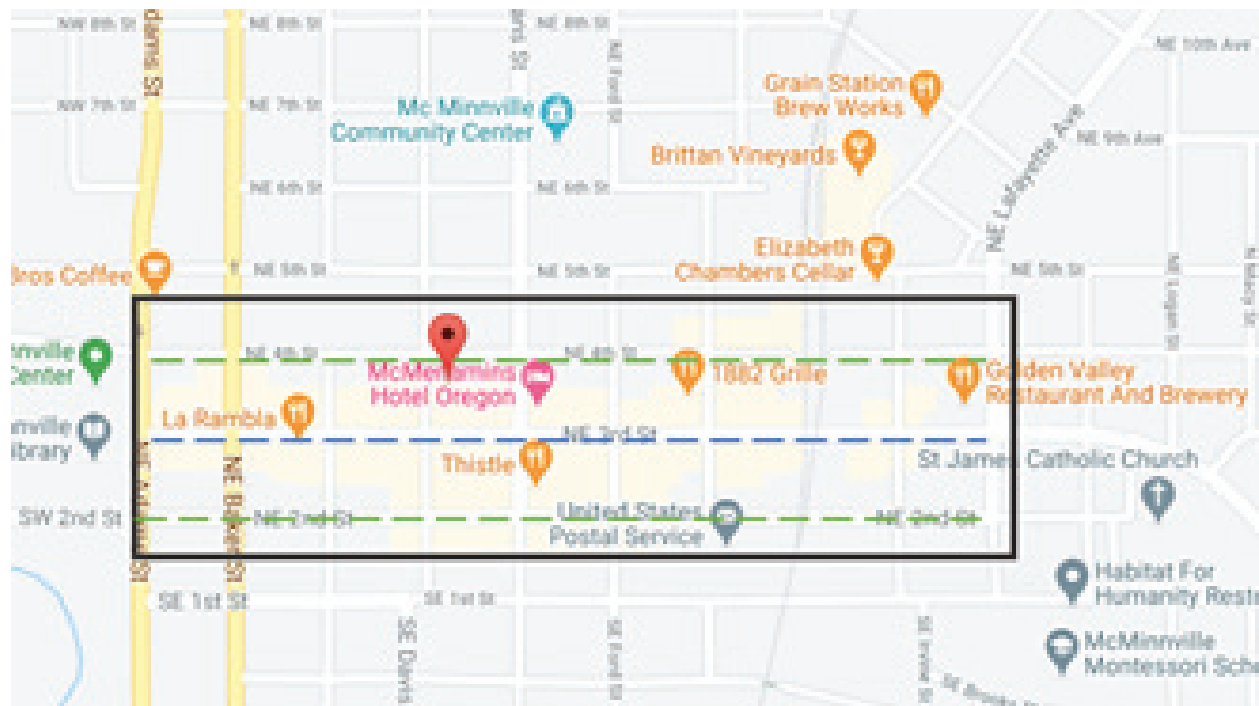


FIG. 1  
EID Boundaries in Downtown McMinnville, Oregon

## **Revenue Sources and Budget**

### Revenue

Actual revenue collected from the EID in 2019 was \$53,718 and in 2018 it was \$59,565. In 2018, the EID revenue made up approximately 25% of the MDA's total revenue for the year (McMinnville Downtown Association, 2018). McMinnville's 2020 amended budget suggested an increase to EID revenue up to \$73,000. While the 2021 approved budget anticipates \$60,000 in revenue collected from the EID to transfer to the MDA, the lack of consistency in revenue since reassessment in 2019 is something to keep in mind.

In addition to the EID revenue, the MDA collects revenue from government grants, the local farmer's market, membership dues and assessments, holiday events, annual dinner and meetings, and other program services (McMinnville Downtown Association, 2018). In total, MDA collected approximately \$230,000 of revenue in 2018. All of these resources are compiled into the budget for the MDA and support the activities and programming of the organization.

### Rates and Assessment

Assessments of the EID are made and approved by the City Council every three years. The district is split into two zones. The first zone, encompassing the downtown section of 3rd Street, is rated at \$0.75 per square foot. The second zone, mostly encompasses the downtown areas of 2nd Street and 4th Street, is priced at \$0.375 per square foot. While reassessment occurs every three years, the rates in the 2021 approved budget are the same rates utilized from 2013-2019. The last assessment was done in August of 2019 and will be the relevant assessment until July 2022 (City of McMinnville, 2020). It is unclear how much of the anticipated \$60,000 come from each zone as specific building square footage for the zones is not identified on the City's or MDA's website.

### Expenditures

A challenge with EID expenditures is that McMinnville transfers full funds collected through the EID to the MDA. The MDA incorporates this into their larger budget. Although the EID has some guidelines for how the revenue is spent, the MDA budget does not specify which activities are funded directly by the EID. It could be inferred all activities of the MDA, including its existence generally, support economic improvements primarily for businesses within the EID but their structure very much supports other dues-paying members who have businesses outside of the EID as well.

MDA is operated by 2 full-time staff and a board of directors; as of 2018, personnel expenditures accounted for approximately 42% of MDA's total expenditures. Other office and operation expenses account for 28% of expenditures. Finally, supporting the farmer's market, holiday events, concerts in the plaza, annual awards dinner, and other expenses make up the remaining 30% of expenditures. Of that 30%, the MDA reports 22% of those expenditures as "other expenses." Considering that is approximately the amount of the budget supported by the EID, more explicit categories of expenditures seems important.

## **Lessons for Troutdale**

McMinnville offers a good starting place for considering the use of an EID in Troutdale to fund their Main Street Organization. There are a few noteworthy takeaways from this investigation to consider in Troutdale's establishment of an EID. First, due to the statute requirements of spending from EID revenue, it is important to provide transparency in the specific use of EID revenue. Even if Troutdale follows a similar system of funneling all the revenue to the Main Street Organization, the organization should hold a separate budget for collection and spending of EID funds.

There are two other noteworthy things that McMinnville recognized and utilized in their EID structure that will be good for Troutdale to consider. McMinnville's use of zones to establish a rate scale based on downtown location and human traffic may increase the equity of EID payments by property owners. In essence, those properties closest to the heart of downtown and with the most walk-by traffic will pay slightly more into the EID as their storefronts will ultimately have priority in aesthetic updates. Another thing to utilize from McMinnville is their use of other funding sources to meet the needs of the Downtown Associations expenses. While initial budgets can be based on the amount of revenue secured through the EID, Troutdale should be prepared to have additional funding sources available to support the activities of the Main Street Organization. For example, McMinnville has dues-paying members that are businesses in the community outside of the EID that pay into MDA and receive membership benefits as well. Being mindful and forward-thinking in the need for outside revenue sources should be considered by Troutdale early on in their establishment of an EID and subsequent Main Street Organization.

## **Summary**

McMinnville created a "model downtown" through their establishment of an EID and utilizing the resources of an MDA to channel the revenue into beneficial activities for the economic prosperity of the district. Although it has shown great success, there are challenges in the transparency of the EID budget, a need for additional resource channels to ensure expenditures are covered, and the use of an external organization to push the funds into activities that support business growth. Troutdale should consider the successes and concerns presented by McMinnville's EID and downtown association to provide the best outcomes for Troutdale's own establishment of an EID and Main Street Organization.

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## Case Studies

### NEWPORT, OR

#### **Enabling Statutes and Local Ordinances**

The City of Newport's Special Parking Area EIDs were created in response to a municipal parking task force's recommendation to modify business owners' parking fee structure from \$175 per parking space annually to a one-time fee of \$7,500 per space (Newport OR, 2011). Business owners perceived this recommendation as unreasonable, inefficient, and inequitable, and as a result they advocated establishing Special Parking Area EIDs to finance the improvement of parking infrastructure. The surcharge fees associated with the Special Parking Area EIDs replaced the previous \$175 annual charge per parking space.

The Special Parking Area EIDs for Nye Beach, Bay Front and City Center operate in accordance with ORS § 223.144 and several city ordinances. Relevant city ordinances include Ordinance No. 2010, Ordinance No. 2013, Ordinance No. 2020, Ordinance No. 2081, and Ordinance No. 2134. Collectively, these city ordinances articulate the Special Parking Area EIDs' genesis, surcharge fees, and boundaries.

#### **Geographic Locations**

The City of Newport's Chamber of Commerce states the coastal town is home to approximately 10,500 residents. Since tourism and commercial fishing are the locality's primary industries, these sources have generated a significant amount of tax revenue (City of Newport, 2020). As such, the Special Parking Area EIDs in Bay Front, City Center and Nye Beach are regions where tourist attractions are prevalent and the commercial fishing industry is homeported.

Page six of the Parking Study Advisory Committee Agenda Meeting Packet provides the following descriptions of the Special Parking Area EIDs. Additionally, a map of the Special Parking Area EIDs is provided in the Appendix.

- "Bay Front: A working waterfront with a mix of tourist-oriented retail, restaurants, fish processing facilities (e.g. Pacific Seafood), and infrastructure to support the City's commercial fishing fleet. The Port of Newport is a major property owner, and a boardwalk and fishing piers provide public access to the bay. The area is terrain constrained, with steep slopes rising from commercial sites situated along Bay Boulevard."
- "City Center: A "main street" style cluster of commercial buildings oriented along US 101 between the intersection of US 101 and US 20 and the Yaquina Bay Bridge. Many of the City's public buildings are within this district, including the Lincoln County Courthouse, Newport City Hall, 60+ Center, Recreation and Aquatic Center, and the Samaritan Pacific Hospital."
- "Nye Beach: A mixed-use neighborhood with direct beach access anchored by Performing Arts and Visual Art Centers. Commercial development is concentrated along Beach Drive and Coast Street, both of which include streetscape enhancements that encourage a dense pedestrian friendly atmosphere. This area includes a mix of retail, dining, lodging, professional services, galleries, single family homes, condominiums, long term and short-term rentals."

### Surcharge Fees and Revenues

Special Parking Area EIDs are funded by surcharge fees assessed to business owners and are based on the number of individuals a business employ. The surcharge fees are outlined on page four of Ordinance No. 2020 and summarized in Figure 1.

Special Parking Area Surcharge Fees	
Number of Employees	Amount
Fewer than five employees	\$150
Five to 20 employees	\$300
More than 20 employees	\$600

FIG. 1

Additionally, the Port of Newport contributes to the Special Parking Area EIDs by voluntarily making an annual contribution of \$6,000 to account for the parking utilized by port employees and commercial fishermen.

It is worth noting that none of the city ordinances or other official city documents explicitly discuss the reasoning for the surcharge fee amounts. However, according to Ordinance No. 2020, “The business license surcharge to be assessed, and contribution from the Port of Newport, is in proportion to the benefit that each business, the Port and other affected parties may derive from the district.”

The surcharge fees have not changed since promulgated in 2011. Special Parking Area EID surcharge revenues are projected on page 94 the City of Newport’s FY 2020-2021 budget and are outlined in Figure 2.

Projected Revenue from Special Parking Areas (2020-2021)	
Economic Improvement District	Amount
Nye Beach	\$7,700
Bay Front	\$19,900
City Center	\$3,000
Total	\$30,600

FIG. 2

Figure 2 depicts the City of Newport’s Special Parking Area EIDs’ projected revenue for FY 2020-2021

## Expenditures

At first glance, it is not difficult to discern that the total amount of revenue generated by the surcharge fees is likely inadequate to fund parking infrastructure improvements. In fact, the projected annual maintenance expenses significantly exceed projected revenues. The estimated Special Parking Area annual maintenance costs are described on page nine of the Parking Study Advisory Committee Agenda Meeting Packet and summarized in Figure 3.

Special Parking Area Annual Maintenance Expenses	
Economic Improvement District	Amount
Nye Beach	\$49,150
Bay Front	\$47,900
City Center	\$39,600
Total	\$136,605

FIG. 3

Figure 3 depicts the City of Newport's Special Parking Area EIDs' expenditures.

This notion is further substantiated by a parking study commissioned by the City of Newport in 2016, which is included in the Parking Study Advisory Committee Agenda Meeting Packet. Page 15 of the packet clearly states, "Existing revenue is insufficient to address maintenance needs let alone pay for additional supply." For this reason, the City of Newport is considering supplementing Special Parking Area EIDs with funding from parking meters.

However, since the use of parking meters is not widely accepted amongst business owners, the City of Newport is exploring implementing additional revenue creating measures. Some of the recommended measures include expanding the Nye Beach Special Parking Area EID, increasing surcharge fees over time, and implementing permit parking fees.

## FINAL THOUGHTS AND RECOMMENDATIONS

Based on the lessons learned from the City of Newport, the City of Troutdale may want to consider the following recommendations when promulgating an EID.

1. Engage community members and respond to their needs. Although the City of Newport's Special Parking Area EIDs are problematic, the implementation of this initiative demonstrates the city's commitment to residents' needs and desires. In this respect, the City of Newport's actions are commendable.
2. Assess a reasonable surcharge fee or tax that creates enough revenue. If necessary, plan on financing the program with supplemental funding using other government funds, grants and/or loans. The City of Newport's justification for establishing the surcharge fee amounts was not available. Yet, it is evident the fee amounts do not generate enough revenue to cover the cost of improving parking infrastructure. For this reason, the City of Newport is currently exploring how to enhance the efficacy of the Special Parking Area EIDs.

3. Evaluate surcharge fees and tax rates on a reoccurring basis. The City of Newport's surcharge fee amounts are stagnant. To account for the increased price of materials, equipment, and labor, the City of Troutdale may want to consider reassessing surcharge fees or tax rates periodically.
4. If generating enough revenue to cover expenditures is a consistent challenge, narrow the scope of the EID. One reason the City of Newport's Special Parking Area EIDs struggles to achieve enough revenue is possibly because the scope of the EIDs is too broad. Maintaining parking infrastructure is very expensive and its unrealistic to cover these expenditures by assessing surcharges on small businesses.

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## Case Studies

### **DURHAM, NORTH CAROLINA**

#### **North Carolina Statutes**

The Constitution of the state of North Carolina, under the Municipal Service District Act, grants local governments the ability to designate special districts when seeking to assess property tax that will go to fund projects and services.

The statutory process as outlined by Kara Millonzi of the University of North Carolina consists of seven steps when implementing a BID. They are as follows:

1. "City council prepares a report which contains: a map of the proposed district; a statement showing that the services are needed in the district to a demonstrably greater extent than the rest of the city; and a plan for providing the proposed services in the district.
2. City council files a copy of the report with the city clerk at least four weeks before holding a public hearing. City mails notice to each owner of property in the district at least four weeks before holding a public hearing.
3. City prepares and publishes a notice of the public hearing at least one week before the hearing.
4. City council holds the public hearing.
5. City council may adopt a resolution defining and establishing the district at any time after the public hearing.
6. Generally, the district becomes effective at the beginning of the fiscal year commencing after the resolution establishing the district is adopted. The city council may make the district effective upon its adoption if it anticipates authorizing general obligation bonds for the project (but no ad valorem tax may be levied for a partial fiscal year).
7. City provides, maintains, or lets contracts for the services for which the residents of the district are being taxed within a reasonable time, not to exceed one year after the effective date of the district" (Millonzi).

#### **Durham Community**

The implementation of Durham's BID occurred under the context of including "only properties that will benefit from the additional services provided in the district" (Millonzi). In the initial staff report of the proposed Durham BID in 2011, the statement of need describes the reasoning for the selected geography as areas of downtown that have been "targeted for redevelopment and revitalisation in recent years" (Staff Report). The designated BID jurisdiction is an area that witnesses the most pedestrian traffic in Durham, and, as noted by the city in 2011, "with projects like the Durham Performing Arts Center and other cultural and recreational amenities such as the Carolina Theater, the Durham Bulls Athletic Park... and the openings of numerous restaurants... downtown has experienced a marked increase in pedestrian intensity and activity, which is anticipated to continue" (Staff Report). A full map of Durham's BID jurisdiction is found in Figure 1 in the appendix.

## **Geographic Area**

Durham's downtown BID measures 0.8 miles of business property area that is assessed an additional property tax of 7 cents per \$100 assessed value of real and personal property. As of 2019, the area of downtown Durham has an estimated 7,200 residents, 3,500+ residential units, 23,000 employees working within downtown, 168 bars & restaurants, 300+ startups, and over \$1.9 billion in investment since 2000 (Annual Report). Demographic information can be found in Figure 2 in the appendix. Examples of the recent development and investment types within the BID such as retail and entertainment, institutional and government, and commercial that took place in 2016 are captured in Figures 3 and 4 in the appendix.

## **Governing Structure**

The city of Durham contracted Downtown Durham, Inc. (DDI), a 501(c) 6 organization, to spearhead the city's BID, putting it into DDI care in 2012. DDI describes itself as "the engine for economic development and growth in downtown Durham, and the entity that focuses solely on the economic health, diversity, attractiveness and cultural vibrancy of downtown" (Annual Report). The service programs provided for downtown include: Clean & Safe, Economic Development, Marketing and Communications and Special Events. A portion breakdown of these services provided within the 2019 fiscal year appears under expenses in Figure 5 in the appendix. The tax that is collected sponsors an Ambassadors program that hires a 'DDI Ambassador Team' to provide the aforementioned services for the businesses within the jurisdiction. In 2019, the 'Clear & Safe' services provided by DDI Ambassadors included 38 square feet of brick laying, collecting 56,655 trash bags, removing graffiti, 4,377 customer service interactions, and social service outreach for 458 people. Within the 2019 Fiscal Year, DDI facilitated \$111 million in downtown investment, partnered with 35+ organisations, and created 3,600 events in the city's online calendar (Annual Report).

## **Revenue Structure**

### Revenue

The revenue from downtown Durham come from general property taxes, transfers from other funds, and appropriation from the fund balance. General property taxes are from the aforementioned 7 cents per \$100 assessed value on property. The transfers from other funds occur from the general fund to pay for some of the contractual services. Appropriation from the fund balance aids to cover any costs that are not covered by the established revenue sources.

The revenue sources in the 2019 Fiscal Year are broken down into three categories:

- 65% municipal service district
- 25% public
- 10% private

The expenses in the 2019 Fiscal Year are broken down as follows:

- 48% clean and safe
- 31% personnel
- 8% operations
- 5% economic development
- 5% placemaking/events
- 3% marketing

The 2020-2021 proposed budget for the BID is \$1.5 million, which is an 8% increase from the previous fiscal year which was \$1.4 million. The 2020-2021 assessed value within the BID boundaries is \$1,759,703,658, with an increased revenue from property tax of 7.6%, or \$104,188 (Fiscal Year 2020-2021 Proposed Budget).

### Expenditures

Durham's BID expenditures, and their estimated rates for the 2020-2021 Fiscal Year, are defined as followed:

- Operating (management contract with DDI) (\$1,181,500)
- Tax collection fee (charged to the city by Durham County) (\$14,024)
- Transfer to other funds (payment to the Solid Waste Fund to maintain collection services) (\$82,422)
- Transfer to fund balance (any surplus is added to the fund balance) (n/a)
- Appropriations not authorised (reserved and not yet assigned) (\$191,529)

### **Troutdale Recommendations**

The most crucial factor in implementing a BID within a certain area is the confident presence of heavy pedestrian traffic and a growing business environment, which will help generate dependable revenue for downtown aesthetic improvements as it simultaneously reaps its benefits. Based on our case study of Durham's Business Improvement District, we are compelled to note how the Durham model would not fit well with the downtown environment of Troutdale and its development goals. Durham is a city that has seen a significant spike in new business and development within its jurisdiction, two of its economic development goals for the city, causing its downtown to grow at a rapid and large scale. This pace of development may be unfavourable to Troutdale due to its own goal of maintaining the unique and familiar characteristics that previously exist downtown. The variation between existing downtown businesses in Durham and Troutdale also lead us to believe that Troutdale's downtown businesses are significantly smaller than those found in Durham and therefore could not support the implementation of a BID similar to that of Durham's.

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## Case Studies

### **COTTAGE GROVE, OR**

#### **Background**

In October 2020, the Economic and Business Improvement District (EBID) merged with the Cottage Grove Main Street program. As the two programs were working in largely overlapping areas within Cottage Grove's downtown, doing similar things, with many people being on both boards- it was seen as an efficient way to handle downtown interests (Sherwood, 2020). This affected the area that these groups manage and combined their funding sources.

#### **Location**

With the merging of EBID and Main Street, that expanded the area of Main Street to the wider range that EBID covered. Previously, Main Street Cottage Grove was focused on the Designated Historic District- shown in Figure 1. There was a focus on the historic district, which had the disadvantage of excluding businesses that were outside of the historic district, but still prominently on Main Street. One example of this is Covered Bridge Brewing Group, which is just on the other side of the South Pacific Highway as seen in Figure 1. But that exclusion from that district meant that said business was unable to reap the benefits of being a part of a Main Street program, such as have access to various grants.



FIG. 1

#### **Designated Historic District Area**

Source: City of Cottage Grove



This merger means that Main Street has gone to working with EBID's area map instead- a much larger area. EBID's area extends on either side of highway 99, to River Road to the West and S Gateway Boulevard to the east. It ranges from Madison Avenue to the south, and Gibbs Avenue to the north. A comparison between the two areas is illustrated in Figure 2. This shift in area now allows for a much greater range of businesses to have access to benefits of being in a Main Street program.

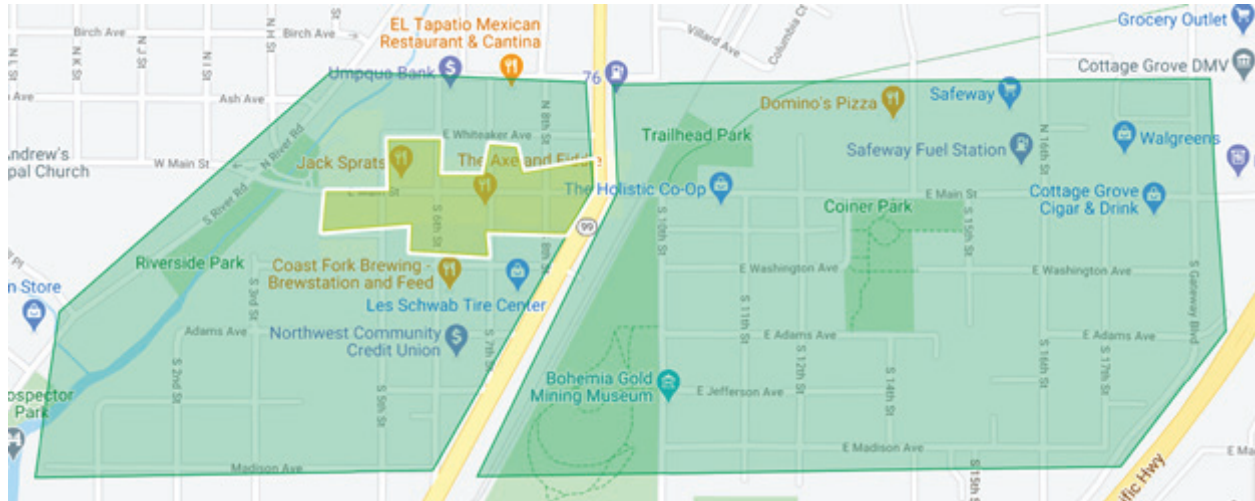


FIG. 2  
Approximate map of Designated Historic District Area (in yellow) compared to EBID area (in green), Cottage Grove  
Source: Google maps

## Expenditures

Many of the expenditures in the two organizations are very similar. "Projects by both entities have included installing park benches, funding the Art Walk, building All-America Square and contributing to the canopy at Bohemia Park" (Sherwood). Beyond that, Expenditures on the side of the EBID are difficult to track down. Meanwhile, the Main Street side of the now same organization is much more transparent.

As a Main Street organization, Main Street Cottage Grove is divided into four main committees that account for different types of expenditures: Organization, Promotion, Design, and Economic Vitality. Summarizing the by-laws, the committees cover the following:

- **Organization:** Organizes and promotes constructive relationships between local government bodies and private business and citizens
- **Promotions:** Typically seen as the events committee in Main Street- this committee promotes the Main Street District by sponsoring cultural, social, and commercial district revitalization activities.
- **Design:** Plans and coordinates design of improvements in or adjacent to the downtown area. Projects/ expenses here include the Downtown Revitalization Project and the Bank Building project.
- **Economic Vitality:** Educates and assists downtown business owners and property owners in matters of preservation, promotion and finance.

Other projects and expenses include Marketing workshops for businesses and the history pub.

An additional source of expenditure is the employee that Main Street Cottage Grove has through the University of Oregon's AmeriCorps program- Resource Assistance for Rural Environments (RARE). Being a part of Oregon Main Street requires that the program has an employee to run it. RARE requires an annual application but is a lower cost way to meet that employment requirement for Main Street programs in rural areas.

### **Funding**

When they were separate forces, each of the two organizations had funding sources of their own.

### **EBID**

EBID is composed of both an Economic Improvement District as well as a Business Improvement District. In 2013, being a part of the EBID was voluntary both for the businesses and the property owners, but then had 81% of property owners and 98% of businesses participating. Membership was \$50 a year for the renters/businesses, and \$100-\$500 annually for property owners (Merkstrom, 2013). This system is also separated into different Tiers. Tier One is "essentially the historical District, and Tier Two [...] encompasses the rest of the business improvement district" (Sherwood, 2020). In this system, Tier Two pays less than Tier One does.

### **Main Street**

Main Street Cottage Grove is funded by the City of Cottage Grove. While the exact source of their budget is unclear in city budgeting documents, I suspect it might be the case that the cost of their projects might be spread throughout the budget due to their nature. For example, the Main Street Revitalization project covers traffic concerns, benches, street trees, bike infrastructure- and all things that appear in different areas of the city budget entirely. Main Street also appears in the budget document under the Community Services section in the General Fund. This section highlights the city working with Main Street and Chamber of Commerce for two different holiday events. With the setup of Main Street focusing on the four different committees with various goals- it becomes difficult to track how much exactly Main Street is receiving from the City as they work with projects from many areas of budgetary concern.

Other sources of funding for Main Street include grants available at the state level from the Oregon Main Street (OMS) program. Grants like the OMS Revitalization grant provided \$200,000 for this district to renovate a historic building, the Bank Building at 6th and Main. (Main Street Cottage Grove, 2019). Donations are referenced a few times in articles as well. An article from 2013 references EBID members contributing \$10,000 to hire a part time employee for the newly developing Main Street Program. Fundraising, like the Hearts on Main event and the flower basket program, also help the Main Street program with funding.

As the two organizations combine, they plan to keep both funding sources. As a nonprofit, they can not only give benefits to members who elect to pay into the EBID/Main Street organization now just known as Downtown Cottage Grove. While people and businesses can opt out, there is a lot of community buy-in in Cottage Grove to be a part of the organization that is helping promote the downtown area.

## Case Studies

### EID: HILLSBORO, OR

#### Background

The City of Hillsboro is the 5th largest city in Oregon and is located within Washington County, just 18 miles West of Portland. It has a population of 103,350 people and has seen an estimated 15% population growth since 2010. The city has grown substantially over the past 50 years but hopes to maintain their small hometown values and agricultural roots.

#### Body

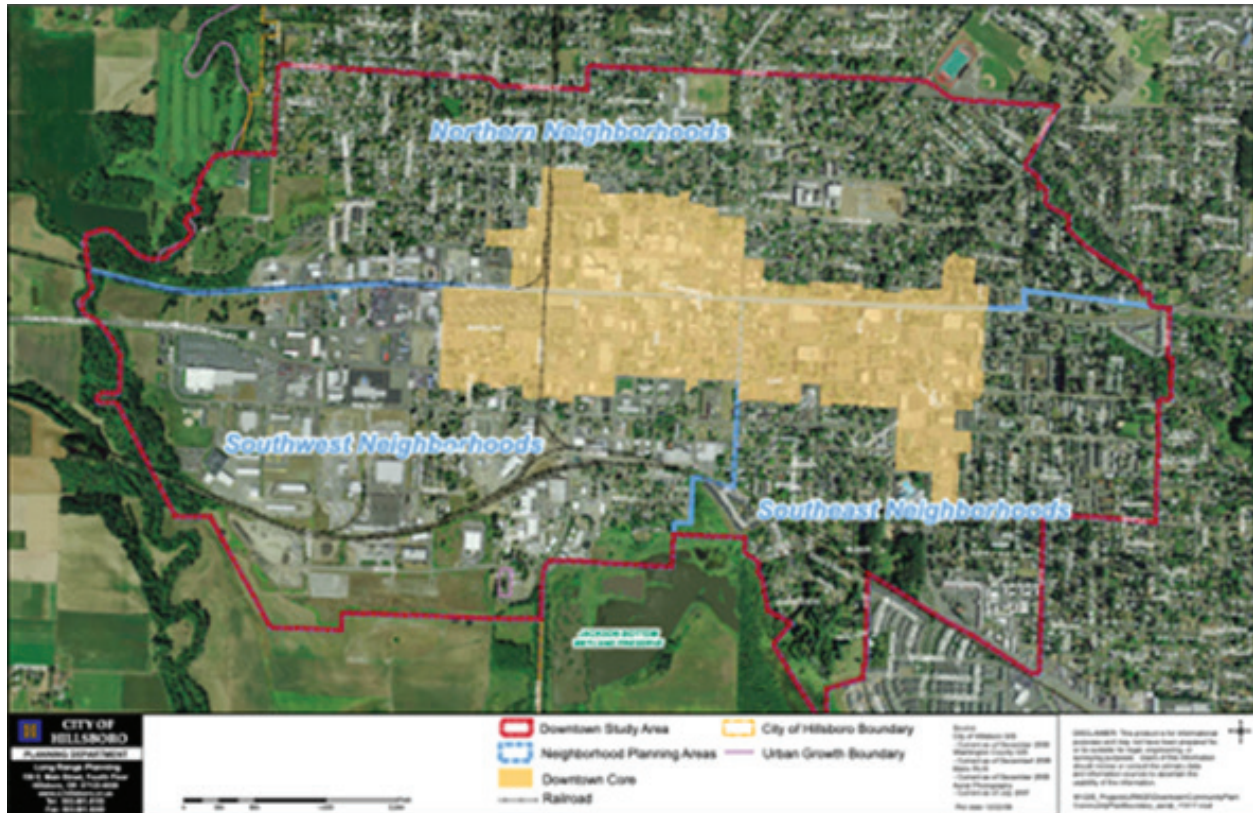


FIG. 1  
Figure 1: City of Hillsboro Study Areas and Downtown Core (EID)

Hillsboro has an economic improvement district (EID) to fund economic development projects and activities (City of Hillsboro 2020). They are also an affiliated Main Street Community with a staffed downtown association call the Hillsboro Downtown Partnership (HDP). The Hillsboro Downtown Partnership receives funding through an EID which are designated commercial districts within which property owners have agreed to self-assess a fee that funds a higher level of service that would have otherwise been provided by the City of Hillsboro (HDP 2020). Downtown Hillsboro's EID has been in place since 2015 and will terminate in 2020 unless renewed for another five years with the approval of district property owners. After evaluating the accessible information, it is not yet apparent if they have renewed their EID for 2020-2025. The HDP has not updated their website showing evidence of a renewal and have not posted financial records for the 2019-2020 FY. Figure 1 represents the Downtown Urban Renewal Area found on the City of Hillsboro's website. The map demonstrating the EID was found in the 2009 City of Hillsboro Downtown Framework Plan which is set to renew this year in 2020.

Hillsboro's EID also referred to as the Downtown Urban Renewal Area is in the historic part of Hillsboro - Main Street and the 10th Avenue business area. This area also intersects the crossroads of three other sub-areas known as the Northern, Southeast and Southwest neighborhoods. Along Main Street there are a variety of locally owned shops and restaurants that community members visit regularly. The city has embraced the arts as a pivotal element in its downtown revitalization efforts (City of Hillsboro Downtown Framework Plan 2009, p.27). The businesses in this area bring a diverse and unique mix, with many of them owned and operated by Hillsboro's growing Latino community.

The Economic Improvement District is maintained by the Hillsboro Downtown Partnership. The HDP is led by a board of directors representing property owners and business owners. The board members very from year to year, and "every director has an expressed interest in the revitalization of Downtown Hillsboro" (HDP 2020). They do this by focusing on the four forces of property value by driving vitality and accelerating the ROI for district property owners. Properties within the EID have lot frontage on Main Street between 1st and 5th are assessed at 0.6% if there assessed value (HDP 2020). Properties within the District that do not front Main Street, along with properties that front Main Street between 5th and 6th Avenues, are assessed at 0.4% of their assessed value, and no assessment will exceed \$1,700 per property (HDP 2020). Unfortunately, there was no maps available through the HDP to show the geographic services, and the only financial information provided was the 2018-19 FY Budget. Within this budget the HDP has a total income of \$158,000, with 63% of that coming from the City of Hillsboro EID. Their expenses totaled \$147,680, with 50% for FTE, 16% for programs and events, and the remaining for shared expenses and other costs. This was all the financial information available for the Main Street affiliate, Hillsboro Downtown Partnership. There was no financial information on specific developments completed, projects, or general numbers on economic improvement.

The available financial information for the EID was further gathered through the Hillsboro FY 2020-21 Adopted Budget. The Economic Development Department assists in the development and maintenance of a competitive economic base and an economy that supports the local businesses ability to thrive, create quality jobs, and provide economic opportunity for Hillsboro residents (p.264). The EDD plans to encourage Downtown development by identifying opportunities for development and working with private developers to create new housing, retail and mixed-use projects, support infrastructure improvements and maintenance to stimulate private investment, and collaborate with partners on downtown enhancement projects and events (p. 265).

The Economic Development Fund accounts for city business and economic development activities. The source of funding includes General Fund transfers, Strategic Investment Program (SIP) revenue from the City's rural SIP agreement, Enterprise Zone Program revenues, and transfers from other city funds that benefit from business created through the City's economic development efforts (p. 634). For the FY 2020-21 the Economic Development Department has a total budget of \$4,231,451. Aside from their beginning working capital, the EDD has most of their revenue as "other" (29%). This category is comprised of Strategic Investment Programs, Leasehold Revenues, Enterprise Zone App Fees, and Enterprise Zone Comm Fees (p. 625). They also have transfers from both their General and Transportation funds, making up 19% of revenues. They have little interest earned and see no transfer from their SIP fund as they have in the past. The Community Development revenue amounts to \$460,439,248 and 7% of that amount is allocated to Economic Development (p.270).

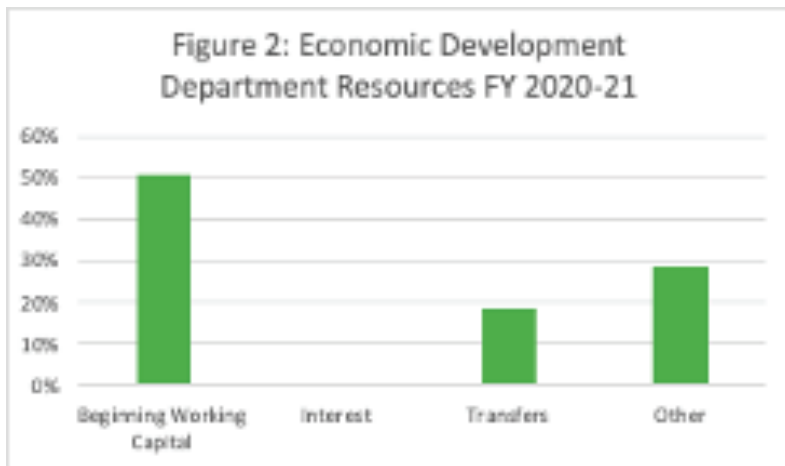


FIG. 2



FIG. 3

**Conclusion**

After evaluating Hillsboro’s EID, it is apparent that there is certain information that is not easily accessible. It was difficult to find an actual map with an outline of the EID, the one provided in the appendices is from the 2009 Downtown Framework Plan. The City of Hillsboro also refers to this area as an opportunity for urban renewal. The city offers an array of incentives to get businesses in their EID, and even has a Main Street Affiliate to aid in their economic improvement. The HDP appears to a beneficial organization, but there could be more information on their website. it would be useful to see an updated financial report, and to see where the money is being spent for economic improvement. The City of Hillsboro has budgeted \$4,231,451 for economic development in FY 2020-21, and it would be interesting to see how much, if any of that amount was provided to the HDP. For an average community member wanting information on economic improvement in Hillsboro, the website provides a lot of useful information. If you are wanting to find more specific information on Hillsboro’s EID, it might be a bit more difficult. Considering the budget itself is over 900 pages, information within the budget can be tough to find.

For the city of Troutdale going forward, it is important to explicitly share the EID map for community members to see. Also important is to provide a quick fact sheet on what and EID is, or what a Main Street Organization is. This information is basic but can be beneficial. One good aspect of Hillsboro’s EID is that they had linked Hillsboro Downtown Partnership on their website, making it easy to find. Troutdale should also ensure they involve the public throughout the entirety of the process. Increasing community involvement could lead to a more inclusive and revitalized downtown.

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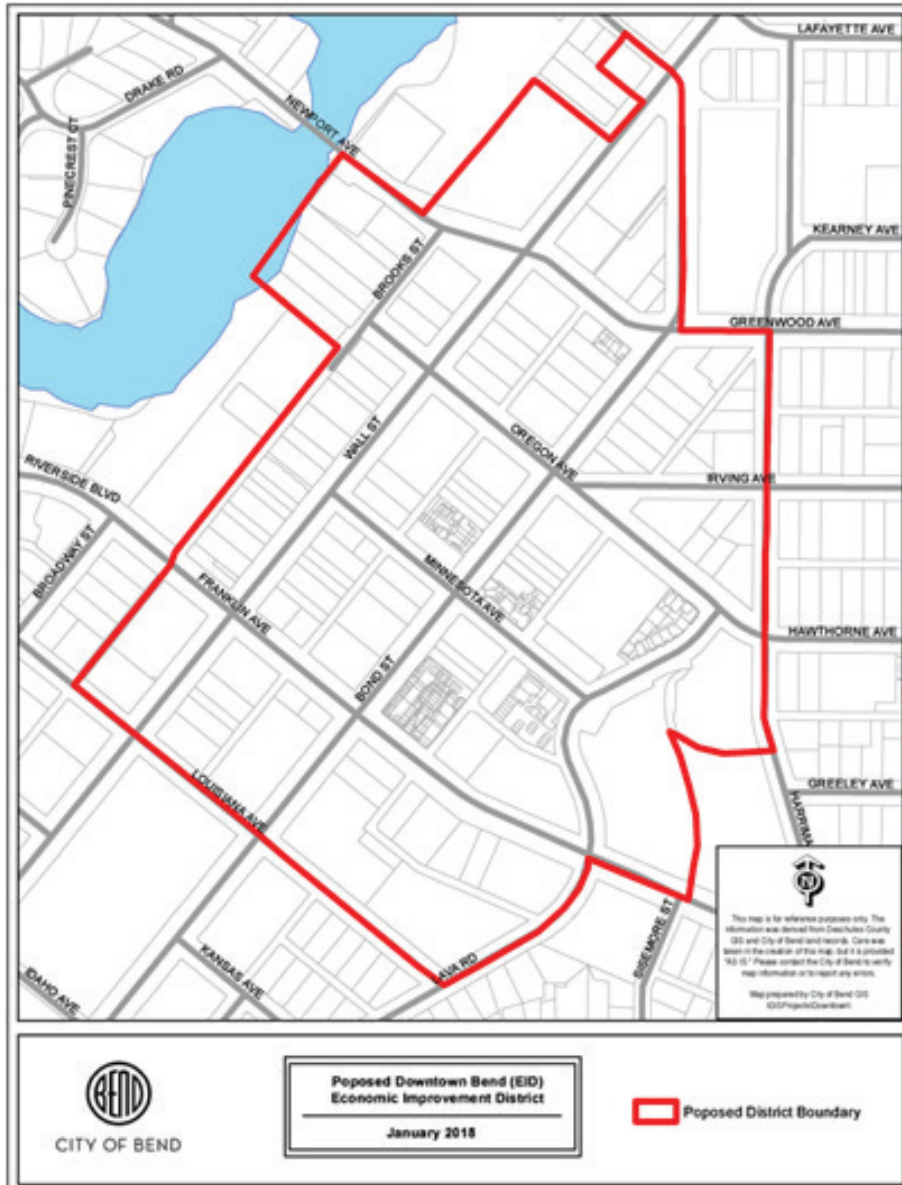
# Case Studies

## EID: BEND, OR

### Background

Oregon state law, ORS223.112 thru ORS 223.295 (Legislative Counsel Committee, 2020), allows cities to create economic improvement districts (EID) to support business development, promote commercial activity, and maintain public facilities (City of Bend, 2018). The district is formed by city ordinance and has a duration of three years; requiring renewal or dissolution at the end. Bend first approved its downtown economic improvement district (DEID) in 2006 and has renewed it four times.

The EID is funded by a resolution for an assessment per square foot of commercial property directly from each business within its geographic boundaries. Since 2012, the revenues are used to fund the Bend Downtown Business Association, a nonprofit that manages the improvement activities (City of Bend, 2018). If 33 percent of affected business owners send the city council written objections to the assessment, the project is terminated under ORS 223.117 (Legislative Counsel Committee, 2020).



## **Body**

Bend's EID is located centrally in the city, encompassing the western downtown commercial area. It borders the Deschutes river and is connected to west Bend's residential zones by the Newport avenue bridge. Located between Drake and Pioneer park, the DEID sits between two ramps for US highway 97. Downtown Bend is home to Bend Chamber of Commerce, Visit Bend, the Downtown Bend Business Association (DBBA), and the cities greatest density of restaurants, shops, and venues. Visualized below are the boundaries of the latest district, updated in 2018 to include another business (City of Bend, 2018).

The DEID is organized according to ORS 223.117 that allows the city to expend revenues deemed as economic improvements. Oregon law allows Bend to create an EID for fundraising. Bend uses those funds to finance DBBA that carries out the improvements. DBBA consists of Bend business and property owners.

As part of an agreement between Bend and DBBA, the improvements consist of the following:

### Beautification services

- Flower baskets
- Planters
- Graffiti Removal
- Tree lights and holiday decorations
- Banners

### Marketing

- Downtown events
- Businesses
- Planning and executing events

### Maintenance Services

- Sidewalk cleaning
- Security
- Public restrooms

### Managing volunteer network

- Friends of Downtown

The DEID is funded primarily through an assessment made by Bend. The current assessment rate is currently at a rate of \$0.25 per square foot. This is expected to generate approximately \$225,376 a year (City of Bend, 2018). The city handles the administrative costs of assessment and collection and retains five percent of the total collected. The disbursement to the DBBA is estimated to be \$214,000 annually. Shown below is Bend's biennial budget that shows the entirety of the budget going to Materials & Services provided by the DBBA (City of Bend, 2019).



**Economic Improvement District (EID) Fund**

	ACTUALS	ADJUSTED	ESTIMATE	BIENNIAL BUDGET		
	2015-2017	BUDGET	2017-2019	PROPOSED	APPROVED	ADOPTED
				2019-2021	2019-2021	2019-2021
<b>RESOURCES</b>						
Beginning working capital	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Miscellaneous	322,524	491,700	482,319	480,400	480,400	480,400
<b>TOTAL RESOURCES</b>	<b>\$ 322,524</b>	<b>\$ 491,700</b>	<b>\$ 482,319</b>	<b>\$ 480,400</b>	<b>\$ 480,400</b>	<b>\$ 480,400</b>
<b>REQUIREMENTS</b>						
Community & Econ Dev. Program						
Materials & services	\$ 306,420	\$ 467,200	\$ 458,230	\$ 456,400	\$ 456,400	\$ 456,400
Total Community & Econ Dev. Program	306,420	467,200	458,230	456,400	456,400	456,400
Interfund Transfers	16,105	24,500	24,089	24,000	24,000	24,000
<b>TOTAL REQUIREMENTS</b>	<b>\$ 322,524</b>	<b>\$ 491,700</b>	<b>\$ 482,319</b>	<b>\$ 480,400</b>	<b>\$ 480,400</b>	<b>\$ 480,400</b>

FIG. 2

**Findings**

- Bend's EID has been constructed lawfully and continues to this day.
- The funding comes from taxes on commercial businesses rather than property owners within stated boundaries.
- The rate is assessed at a rate of \$0.25 per square foot of the business within the geographic boundary.
- There is no private funding collected by the city or being reported due to the improvements being managed by DBBA.
- The DBBA doesn't share its financial records for accountability of how the funds are spent.
- How the funds are spent are important in measuring the effectiveness of its various program initiatives.
- The DBBA additionally charges its members for membership and services such as banners listed as part of the EID program.
- DBBA membership is not publicly available.
- Bend published the list of businesses affected by the EID assessment.

## **Assessment**

Setting a short limit on the length of the EID allows the businesses affected to decide periodically if it is working or if it should be dismantled. The 33 percent required to dismantle an EID may be prohibitively large but any property owner that submits an objection before the public hearing will be exempt from levied assessments (Legislative Counsel Committee, 2020). Bend's business owners taking charge of the how the EID funds are being spent is practical but the DBBA lacks the transparency usually expected of taxes being spent.

The following are practices Troutdale should adopt with an EID:

- Ensure compliance with Oregon state law when forming an EID
- Retain a percentage of the assessment for administrative cost
- Use a moderate duration of the EID, such as three years
- Assess businesses that gain benefit from the improvements
- The EID can be expanded upon and rates can change before choosing to renew it
- Be wary of outsourcing improvements to maintain financial transparency

## Case Studies

### MIAMI, FL

#### **Overview**

This memo will serve as a case study for the City of Miami, FL's use of Economic Improvement Districts (EIDs), Business Improvement Districts (BIDs), and/or their equivalents. The memo will dive deeper into the details of these districts, and round out with a series of recommendations for the implementation of Troutdale's prospective EID/BID.

#### **Background**

The City of Troutdale is collaborating with the University of Oregon on the research and development of an EID/BID, as well as a Capital Improvement Plan (CIP). The research is being conducted by several SCYP groups, of which we have been tasked with EID/BID research, and the formation of recommendations for Troutdale's prospective EID/BID. Each individual in the group was tasked with an EID/BID case study for Troutdale to reference. For this memo, the City of Miami was selected.

#### **Information**

The City of Troutdale would like to compile several different case studies of EID and BID equivalents being implemented across Oregon, and in cases such as this, across the United States. This memo will explore the different methods by which Miami incentivizes and invests in economic development. Though Miami does not have an EID or BID per say, it finds similar methods of fostering economic development through public investment, in methods such as commercial tax and fee(s) relief, as well as direct capital investment. The case study will explore the following key components of these economic development initiatives:

- Enabling Statutes
- Communal and Geographic Makeup of the Development Areas
- Governance Structure
- Revenues
- Expenditures

The following subsections will explore the aforementioned development zone components in further detail.

#### **Enabling Statutes**

In 2010, the State of Florida passed two pieces of legislation which extended the power of county and municipal governments to form economic development zones, as well as the imposition of additional business taxes and fees. The Florida Senate holds that the premise of both statutes, as identified by text directly in both statutes, is that "The Legislature finds and declares that this state faces increasing competition from other states and other countries for the location and retention of private enterprises within its borders. Furthermore, the Legislature finds that there is a need to enhance and expand economic activity in the counties of this state by attracting and retaining manufacturing development, business enterprise management, and other activities conducive to economic promotion, in order to provide a stronger, more balanced, and stable economy in the state; to enhance and preserve purchasing power and employment opportunities for the residents of this state; and to improve the welfare and competitive position of the state. The Legislature declares that it is necessary and in the public interest to facilitate the growth and creation of business enterprises in the counties[/  
municipalities] of the state." This large piece of text is situated in both statutes, and is clearly indicative

of the political pressure that the state was feeling to compete for, and retain, general enterprise. Extending the power of local governments to facilitate this competition was an intriguing choice, and one that is fundamental to the competitive prowess of local Floridian governments to this day.

In 1999, the Federal Government established multiple Empowerment Zones throughout the country, one of them being in Miami-Dade County, the county in which the City of Miami lies. These zones were administered by the Department of Housing and Urban Development (HUD), and used tax credits plus cash incentives to catalyze commercial investment in what were considered blighted areas of the country. These zones were a Presidential initiative, and were meant to be much more community driven in the decision-making regarding project investment.

### **Communal And Geographic Makeup Of The Development Areas**

The City of Miami and Miami-Dade County use their economic incentives throughout the entirety of their geographic boundaries, but the aforementioned Federal Empowerment Zones are situated around some of the more economically depressed areas of Dade County. Among these is the Allapattah neighborhood, which is situated between Miami International Airport and the coastline. Known for its vibrant Caribbean culture, this neighborhood is home to the largest open-air market in the City of Miami, and is an institution of the city's cultural makeup. Reminiscent of downtown markets in Latin America, this neighborhood is a focal point for the city's economic development strategy. Another neighborhood targeted by the Empowerment Zones is Wynwood, also known as the city's Art District. Home to the famous Art Basel Festival, this neighborhood has shown some of city's greatest development in the 21st century, as it had previously struggled with blight, Wynwood is now the favorite area of many locals and tourists alike. Overtown is another neighborhood that has been targeted by the Empowerment Zones and other Miami economic development initiatives. One of the oldest neighborhoods in Miami, it has served as an integral part to the city's development, and is the centerpiece of Black culture in Miami. Though the neighborhood has struggled heavily with economic development, it has two major upsides. It is situated near the center of the city's major medical and civic districts, which is something that could potentially be leveraged in the economic uplift of the neighborhood. The other two neighborhoods that are covered by the Empowerment Zones are East Little Havana and Model City. Little Havana is the cultural heart of the city, and is home to much of the city's Cuban history. Home to Domino Park and Calle Ocho (8th Street), Little Havana along the corridor that leads to the ocean, and is a must-see for anyone visiting Miami. Model City is another predominantly Black neighborhood, that also has many economic upsides. The neighborhood is part of commercial, residential, cultural, and educational districts, thus providing many points leverage for economic uplift.

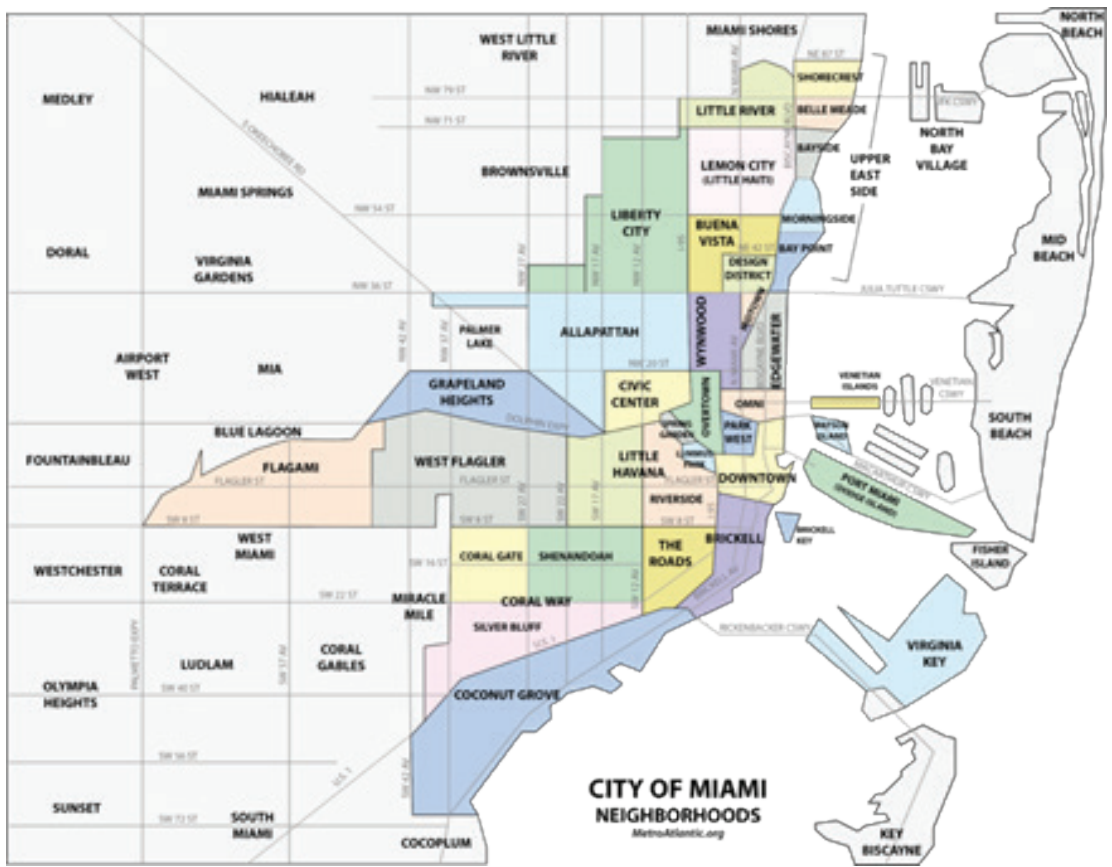


FIG. 1  
The color shaded sections represent Miami Proper

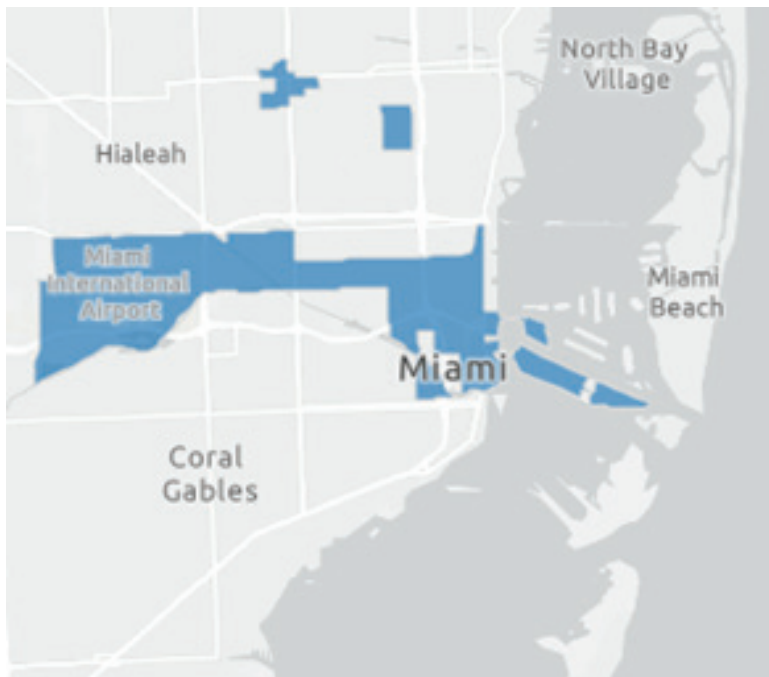


FIG. 2  
The blue shaded sections represent the city's Empowerment Zones

## **Governance Structure**

The City of Miami's economic incentive initiatives, as well as those of Miami-Dade County's, are predominantly administered by a public-private partnership. This partnership is the Miami-Dade Beacon Council, which reports its administrative process and economic development results to the state in an annual report. This function is mandated by the state, as multiple state statutes require that public-private partnerships that receive local government funds for economic development purposes compose an annual report outlining the details of the financial relationship. The Miami-Dade Beacon Council is led by a large Board of Directors, which is composed of private sector leaders, public officials, community leaders, and academics. This board is the predominant force in setting the organization's, and thus the city and county's, economic incentives and economic development plan.

Though the funding for the Empowerment Zones is provided by HUD, the administration of each zone goes through citywide organizations. In the City of Miami, the Empowerment Zones and the projects associated with them are administered by a non-profit organization named the Empowerment Zone Trust. Decisions on Zone projects and investments are a matter of collaboration, between the Empowerment Zone Trust, City Officials, and Neighborhood Leaders.

## **Revenues**

Due to the fact that the Miami-Dade Beacon Council is a public-private partnership, the revenues for the organization are derived from both public and private functions. As of the end of 2018, their Fiscal Year 2017-2018 revenues were \$5,183,500. This was comprised of \$1,242,494 of private investment and \$3,941,056 of public investment. Similar to the EIDs and BIDs established in Oregon, the Miami-Dade Beacon Council derives their public investment funds from surcharges on a Business License Tax.

## **Expenditures**

The Miami-Dade Beacon Council accumulated \$5,233,553 in administrative expenses over Fiscal Year 2017-2018. Direct financial investment totaled \$1,415,704. This is comprised of \$1,390,362 in training subsidies and \$25,342 in local matches. The Miami-Dade Beacon Council also accumulated non-direct expenses in taxes and fee waivers. This totaled \$5,761,562, which was comprised of \$5,146,122 in regulatory fee refunds/waivers/exemptions, and \$615,440 in property tax exemptions. This means that the total cost of expenses when summarizing the Miami-Dade Beacon Council's administrative costs, its direct investment, and the local government foregone revenue, is \$12,410,819.

## **Conclusions**

The City of Miami is bound by Florida State Law, which is different from those statutes which have been adopted by the State of Oregon, therefore the economic development opportunities presented to local governments in the two states will differ. However, the City of Troutdale can derive lessons from specific components of Miami's economic development initiatives.

- The city's public-private economic partnership differs from an EID/BID administrative setup, but shows that private buy-in to economic development incentives is integral to the success of economic development zones. The Miami-Dade Beacon Council's annual revenue was comprised of over 20% private investment, which shows that local businesses were bought-in to the idea of public-private cooperation for economic development.
- Identifying neighborhoods and/or areas of the municipality that have not only several points of economic leverage, but also a deal of cultural significance to the city, is important to the overall municipal success of these development initiatives. Miami targeted areas that were both economically depressed and significant to the city's identity. They have achieved a great success in the development of their Art District, Wynwood, and now host world renowned art festivals in the neighborhood.

## Case Studies

### OREGON CITY, OR

#### Background

The statutes allowing municipalities to form an economic/business improvement district are found in Chapter 223: "Local Improvements and Works Generally." 223.112 - .295 contain the statutes relevant to Economic Improvement Districts; most important are sections 223.114 and .144. ORS 223.114 – Economic Improvement, Assessment Ordinance gives cities the power to "enact an ordinance...making assessment for cost of an economic improvement upon the lots which are specially benefited by all or part of the improvement..."

This assessment on the property is limited by the second clause, which states that the assessments in such a district cannot "exceed one percent of the real market value of all real property located in the district," and the district cannot include "any area of the city that is not zoned for commercial or industrial use." ORS 223.144 – Economic Improvement District, Business License Fee Ordinance says that cities may also raise funds for economic improvement by "...imposing a business license fee...fee may be in the form of a surcharge on an existing business license fee imposed by the city...in the economic improvement district."

Oregon City is the Willamette Valley's oldest incorporated Euro-settlement. Located between the Willamette and Clackamas Rivers, Oregon City grew from a fur-trading outpost to a bustling mill town over the course of the 1800s. The early 20th century brought more people, commercial activity, and wealth as the timber and paper mill industries thrived. As those industries declined, the town pivoted towards a greater degree of cultural and tourism-related businesses. Today, Oregon City's population is estimated to be a little over 37,000, 90% of whom are white. Two-thirds of housing units are owner-occupied, and the median gross-rent is \$1,157 per month.

#### Oregon City's Economic Improvement District (EID)

Oregon City's Economic Improvement District and Main Street program was started in 2009, then called "Main Street Oregon City." It was the first Main Street organization in Oregon, and since its inception has been a volunteer led group. They have since rebranded as the "Downtown Oregon City Association" (DOCA), but their mission remains the same: be an advocate for Oregon City's downtown commercial area, building the downtown's brand, and making the city as a whole more vibrant and economically viable for small businesses. The Economic Improvement District (EID), which reached its sunset schedule in 2018, was rebranded and reinstated as the "Property Membership District" (PMD) program. It is at the heart of the Association's efforts, and is also one of their primary sources of revenue.

#### EID/PMD Area



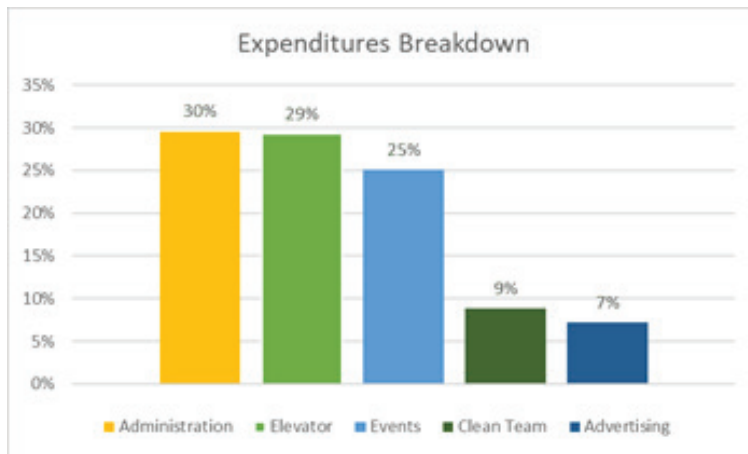
FIG. 1  
Downtown Oregon City Association's Property  
Membership District Map.

The PMD includes 129 tax lots, totaling \$35 million in non-exempt assessed value. Like the EID that came before it, the PMD is a voluntary program that assesses property at different rates, depending on which “Zone” the property falls under within the PMD. Zone 1 is assessed at \$.25/s.f. of lot; Zone 2 at \$.15/s.f.; and Zone 3 at \$.10/s.f. The maximum gross assessment amount is \$1,250 per lot in Zones 1 and 2, and \$975 per lot in Zone 3. The different zones and their assessment rate correspond to differing levels of service.

**Governance**

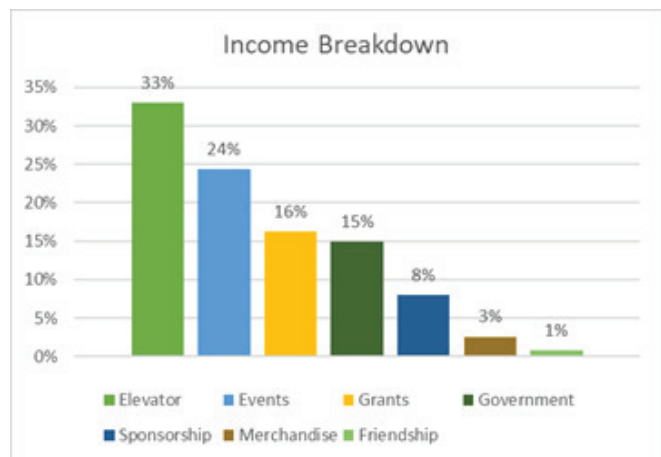
DOCA collects and administers the revenues from the PMD and other activities. The organization is managed by a volunteer board of directors, mostly comprised of representatives from businesses in the PMD. There are eight members of the board, whose responsibility it is guide the organization, set forth a plan and programming for the year, spearhead DOCA-sponsored projects and build support for them. Their operations are supported by paid staff that includes an executive director, operations manager, and an events & placemaking manager. DOCA also hires seven individuals as Elevator Guides for the Oregon City Municipal Elevator.

**Revenues And Expenses**



Type	Amount
Elevator	\$132,000
Events	\$97,382
Grants	\$65,203
Government	\$60,000
Sponsorship	\$32,000
Merchandise	\$10,389
Friendship	\$3,273
<b>Total</b>	<b>\$400,247</b>

Type	Amount
Administration	\$118,561
Elevator	\$117,403
Events	\$100,597
Clean Team	\$35,558
Advertising	\$28,901
<b>Total</b>	<b>\$401,020</b>





The Municipal Elevator, a local tourist attraction that DOCA operates under contract with the city, provides a third of the organization's income by itself. Grant and government revenues, which are made available by the PMD assessments and qualification for grants through the Main Street Organization, make up another 30% of the revenues. Revenues from events make up almost a quarter, and the remainder comes from merchandising and donations. Approximately 64% of revenues come from public sources. DOCA states that the PMD has "historically raised between \$60,000 and \$120,000 per year."

On the expenditures side, we see that administration is the largest single expense for DOCA; the elevator is a close second, and events not far behind that. The revenues from the elevator and events cover their expenses, with a little left over from the elevator. Administration expenses are roughly equal to the revenues from the PMD assessments and grants. The last ~15% of expenses are in the Clean Team, one of DOCA's services as part of the "Friends of Downtown" program, and then marketing. Sixty-eight percent of expenses are spent on DOCA operation costs and services (admin, elevator, Clean Team).

### **Key Programs**

DOCA has several "Selected Support Programs" that it funds and administers as a part of its "Friends of Downtown" for PMD members. "Clean & Safe" maintains streets, sidewalks, and other assets in the right-of-way (e.g. streetlights). They maintain an advisory group to help with issues related to the transient population within the PMD. This is coupled with offering grant funding for aesthetic improvements in the downtown space. DOCA advocates for policies and other programs that benefit businesses within its district, as well as recruit more businesses to the area.

Along with these services, DOCA stages events around the PMD that generate retail activity, crafts a marketable image for the downtown, and operates/maintains public assets such as the Municipal Elevator. All of these activities fall into the "4-Point Approach" of the national Main Street America organization: economic vitality, promotion, design, and organization. Some of these events include: 175th Anniversary Commemorative Art Print Seek & Find, Trick or Treat on Main Street, Tree Lighting Ceremony, Oregon Trail Brew Fest, Pedestrian Safety Project (10th and 99E & Main), and more.

### **Conclusion**

DOCA claims to have created almost \$42-million in public and private reinvestment in the downtown/ PMD since the organization was founded. Downtown Oregon City Association has built a successful brand for the downtown area of Oregon City, bringing significant investment and attractions for the public. DOCA successfully leveraged existing assets and characteristics of the town to build upon that brand and inspire relevant events (e.g. end of the Oregon Trail, the Municipal Elevator). DOCA's services and event facilitation have proven valuable to the businesses in its voluntary EID, promoting business retention and reinforcement of the downtown's brand identity.

## Case Studies

### SALEM, OR

#### **Overview**

This memo describes the City of Salem's economic improvement district (EID) and includes information regarding the enabling statutes, location, governing structure, resources and expenditures of this district. By analyzing the city's funding mechanism for community revitalization, recommendations and best practices for implementing and managing this type of district become clear. The following information will help guide suggestions for economic development efforts in the City of Troutdale as it looks to different funding options to accomplish city-wide goals.

#### **Context**

During the fall of 2020, the City of Troutdale requested the help of graduate students in a Public Budgeting course at the University of Oregon to research how the jurisdiction could best support economic development. Two different funding tools were identified: economic improvement districts (EID) and business improvement districts (BID). While both funding mechanisms enable a community to fulfill certain revitalization goals and plans, it is important to note some key distinctions. Whereas an EID is a fee levied on property owners based on an assessed value or market value of commercial property only, a BID is a fee paid by business owners, usually by adding a surcharge on business licenses. Although these tools are useful in supporting certain projects, they cannot be used for capital improvement.

To help evaluate which funding mechanism is the most beneficial for the City of Troutdale's identified goals, the City of Salem's EID was researched and analyzed. Although Salem's EID lasted a little less than 10 years, the following sections provide an in-depth examination of the EID during its height in the fiscal year 2013-2014. This information will be used to help shape the recommendations and best practices presented to the City of Troutdale in December 2020.

#### **Information**

In continuing to research the most sustainable and gainful way for the City of Troutdale to support community rejuvenation efforts, the City of Salem's EID was thoroughly examined with respect to several key aspects including:

- Enabling statutes for an EID in Oregon Revised Statutes;
- A brief description of the area;
- The geographic extent of the district;
- The governing structure of the EID;
- The revenue sources, rates and total budget for the district; and
- Key categories of expenditures for the district.

In order to best assist the City of Troutdale, each of these points will be discussed in detail followed by an assessment of the City of Salem's implementation of this funding mechanism and its management.

## **Enabling Statutes**

On January 14, 2008, The City of Salem’s City Council voted to establish an EID as authorized by the city’s home rule powers and ORS 223.112 to ORS 223.161. In accordance with Oregon State Law, chapter 44 section 44.005 of the City of Salem’s Code of Ordinances outlines and defines the Creation of Salem’s Downtown Economic Improvement District. With reference to ORS 223.112, the City of Salem’s EID is authorized to provide the following seven services:

- The planning or management of development or improvement activities;
- The conduct of activities in support of business recruitment and development;
- The marketing and promotion of businesses, public events and other activities occurring in the EID;
- The provision of decorations, flowers, trash cans, planters, benches, banners, signage, or other assets that benefit the EID;
- Cleaning and maintaining the public spaces within the EID; and
- Any other economic improvement activity that specially benefits the EID.

As described in Ordinance Bill No. 1-08, upon the initiation of the EID in 2008, the district would be in existence for three consecutive years unless City Council extended the duration of the district as provided in ORS 223.124. This occurred twice. The second renewal, which occurred in 2014, was the last resulting in the dissolution of the EID on June 30, 2017. The following sections detail the EID during the fiscal year 2013-2014, presumably after the second extension of the EID. Additionally, in alignment with ORS 223.114, the proposed area for the EID was zoned as commercial.

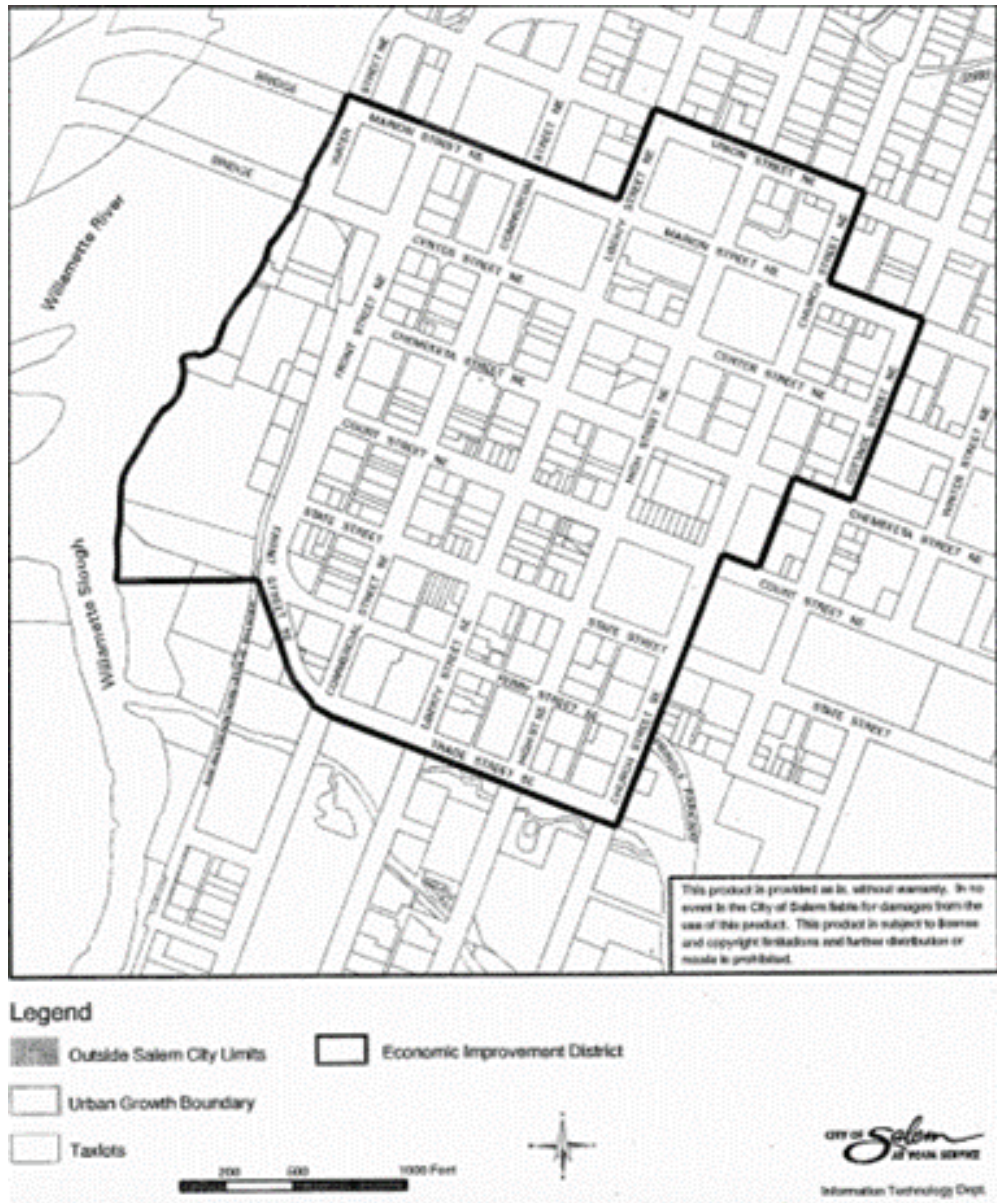
## **The City Of Salem**

The City of Salem, Oregon’s capital city, is located in Marion and Polk counties and encompasses 49 square miles. The population is 167,400 making it the third largest city in the state of Oregon. In addition to its family-friendly atmosphere and outdoor amenities, downtown Salem has numerous shops, restaurants, and breweries to choose from and enjoy. The city takes great pride in its downtown as it is home to many State government buildings and the oldest university in the West. Additionally, many cultural arts events are held in Riverfront Park and the Civic Center, both located in close proximity to this central district. Due to its relatively large population and high number of visitors, downtown businesses want to extend a warm welcome to patrons and ensure that their experience is a pleasant one. According to the Statesman Journal Editorial Board, “The EID had been formed to make downtown Salem more attractive, market it better and, [...] build a unified voice in civic affairs.”

## **Geographic Extent Of The District**

In 2008, as Council voted to establish a downtown EID, a map of the geographic extent of this district was presented, along with a list of the peripheral streets. In alignment with ORS 223.114, the proposed area for the EID was zoned as commercial. Figure 1 shows the map included in Ordinance No. 1-08. The map shows an approximately two-mile section of businesses to be included in the EID in the eastern part of Salem’s downtown.

FIG. 1  
**Proposed Salem  
 Downtown Economic  
 Improvement District**  
 Source: Ordinance No. 1-08,  
 pg. 27



**Governing Structure**

When the City of Salem’s EID was first established in 2008, City Council authorized the City Manager to enter into a contract with Go Downtown Salem!, a downtown organization made up of 13 downtown business and property owners, to assist in the formation and management of the EID. In 2013, the City terminated that agreement and began administering the EID. This new governing structure included the City Manager assembling a Downtown Steering Committee made up of businesses, property owners, and large retailers downtown to discuss priorities and provide recommendations to the City Manager concerning the City’s administration of the EID. In 2014, then City Manager Linda Norris served as the EID administrator and her City Manager Downtown Steering Committee was comprised of 16 group members, including the Urban Development Department Director and other representatives of various businesses interests. It is important to note that in Salem’s Code of Ordinances, section 44.010 gives the Finance Officer authority to administer and enforce the provisions of the EID, as well as to interpret and adopt administrative rules and procedures deemed necessary for the EID’s administration and enforcement.

## **Revenue Sources, Rates, And Budgets**

In a letter to the Mayor in 2007, Chairman of the Board of Go Downtown Salem!, John Whitney, proposed an assessment rate of \$.07 per square foot for developed property and \$.02 per square foot for parking lots and vacant parcels to be paid by the property owners of said lots. The summation of all property charged at this rate would amount to \$200,000 per year for the first three years. This assessment rate stayed constant throughout the duration of the EID until its dissolution in 2017. As outlined in section 44.045 of the Code of Ordinances the assessment is due one month after the date the bill for the assessment is mailed to the debtor. If the owner fails to pay on time, a penalty equal to 10% of the amount of the assessment due shall be owed.

During fiscal year 2013-2014, the EID had three revenue sources which included:

- Assessment Principal: \$235,000;
- Interest: \$1,000; and
- Beginning Cash Balance: \$77,000

These three sources resulted in a total of \$313,000 for the year, \$113,000 more than the budgeted amount. Additionally, the adopted budget for fiscal year 2013-2014 allocated \$85,000 to the Parking Fund for downtown services and streetscape maintenance. This money was generated from a parking tax assessed to the business owners located within Salem's Downtown Parking District boundary and the sale of parking permits.

## **Expenditures**

The City of Salem's Code of Ordinances establishes that the expenditure of money derived from the assessments and earned interest on money collected will only be spent for economic improvements within the EID and for the cost of City administration for the EID. The adopted budget for fiscal year 2013-2014 authorized the expenditure of \$313,000 for the EID. The Downtown Steering Committee, with respect to the budget amount, prioritized which activities funds should support. These included:

- Clean team;
- General Maintenance/Cleanliness;
- Marketing;
- Beautification;
- Communication/Downtown Web Development;
- Contractual Services—part-time EID Coordinator;
- Economic Impact of EID Funds; and
- Grant Programs.

As shown in Figure 2, the Downtown Clean Team, a group responsible for keeping the sidewalks clean, cleaning trash receptacles, and providing assistance to citizens and visitors, received the largest share of the budget. Contractual Services EID Marketing and Promotion, Beautification, Communication and Web Development, and Future Economic Impact all received over \$30,000 in allocated funds.

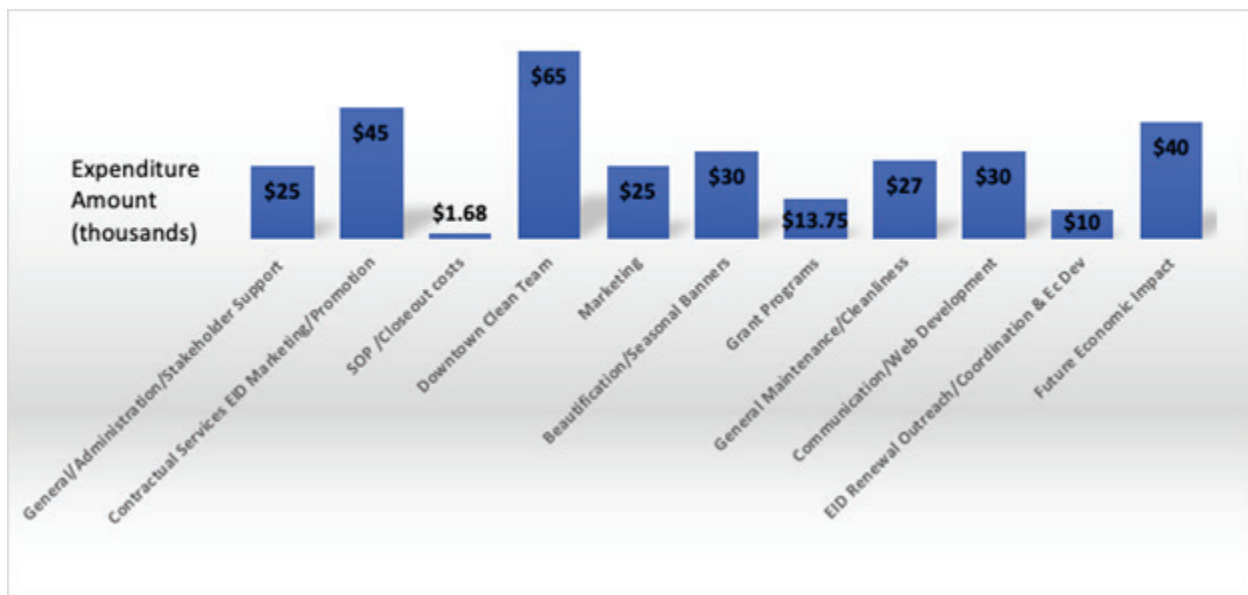


FIG. 2  
Expenditures for EID Funds FY 2013-2014  
Source: Based on budget in letter from Wales, J. H. (2013)

## Recommendations

As the City of Troutdale assesses the best way to fund community revitalization efforts, several key lessons can be learned from the City of Salem's nine-year long EID.

- Governing structure is critical to the longevity of the EID. Once the City took over and began administering the EID, some property owners were very upset and felt that their control over how the funds would be spent was diminished leading to many voting against its renewal. Seeing as the City of Troutdale is considering overseeing the preferred funding mechanism, it is of high priority that business/property owners feel included and their voices heard.
- Although the expenditures of the EID are well drawn out and clear, they were very difficult to find. In order to have more transparency, the City of Troutdale should consider publishing the budget in an easily accessible area.
- Salem Main Street Association appears to be unpopular and ineffectual. According to one account, the board is self-selected and does not represent downtown business owners. If Troutdale decides to institute a Mainstreet organization, trust must be built with property and business owners, and open communication must prevail.
- The City of Salem's EID expenditures, specifically the amount allocated to the Downtown Clean Team, promotion and future economic impact, may be helpful for Troutdale to reference when devising their own budget and estimating the cost of certain requirements.

Although the City of Salem's EID was terminated in 2017, the events that led to its dissolution provide valuable information for the City of Troutdale. Having open communication and representation with and for business and property owners is of the utmost importance. Additionally, having clear priorities will facilitate fund allocation for a future EID/BID.

## Case Studies

### **CORVALLIS, OR**

#### **Overview**

This Memo will examine the City of Corvallis' use of an Economic Improvement District to improve the viability and aesthetic of their central business corridor. It will first give a background of the city of Corvallis, its demographics and similarities to Troutdale and continue with: The enabling statutes for the EID found in the State of Oregon's Revised Statutes; The geographic extent of services provided by Corvallis' EID; The EID's governing structure; It's revenue sources, rates and total budget for the district; The district's key categories of expenditure; and lastly the memo will look at Corvallis' path of implementation for it's downtown EID and whether it provides a framework that could be useful for Troutdale as they consider improvements in their downtown.

#### **Background**

Corvallis, Oregon is a college town, home to Oregon State University, and is centrally located in the Willamette valley between Salem and Eugene. With a population of nearly 60,000 people the city has a robust downtown, with a small-town feel, and very little non-local business. While it has many differences to Troutdale it shares a similarity in its use of an Economic Service District to improve its downtown commercial zone. Corvallis, like Troutdale, has a quaint and inviting small-town feel and is flanked by a riverfront park. Also similar to Troutdale, Corvallis' downtown features several festivals and events around art and community that work to benefit the economic well-being of their city. Their waterfront park hosts a weekly farmer's market, the downtown hosts an electric light parade and Christmas tree lighting, and their central park hosts a robust fall festival, all of which have been successfully maintained for decades.

#### **Enabling Statutes**

The Downtown Corvallis Association (DCA) has been active since 1983 and was created in conjunction with Corvallis' original improvement services district, their now defunct Downtown Development District. The DCA is a non-profit corporation created to support the revitalization, preservation, and enhancement of the downtown area. Under the guise of DCA, the city's downtown Economic Improvement District was established in 1993, as outlined by state statute (ORS 223.144 - which allowed for the development and taxation of economic improvement districts) and has been reapproved every five years since. All quotations (unless otherwise noted) in this memo come directly from Corvallis' City records, primarily chapter 10.07 of its Code of Ordinances.

Corvallis in it's 2020-2021 Budget, housed under the "Innovate and Prosper" lens specifically includes intention to support it's downtown EID, stating "The Corvallis-Benton County Economic Development Office is a leader and key partner in the economic development ecosystem for Corvallis and Benton County" and that "The City actively engages with community partners to support a strong and vibrant downtown as the heart of our community." It does this through city participation in "downtown events at least 12 times per year." And through "Support (of the) renewal of Downtown Corvallis Economic Improvement District."

## Eid Operating Area

The EID runs from the bridge across the Willamette at Harrison Avenue and extends southward to Southwest Washington Ave. Horizontally it spans from 1st Street to 5th Street east to west.

As you can see from the full color segment of Corvallis' current zoning map, this area encompasses a large swath of the city's Central Business Zone.

Of the businesses that can participate in the program 71% are voluntarily involved in the EID (as of 2017).

Along the right side of the Central Business district is the riverfront park –which as stated is home to festivals, the farmers market, and many other events that bring people and dollars to the city and its businesses.

## The Governing Structure For The Eid

According to the Corvallis Municipal Charter "The City may designate the Board of Directors of the Downtown Corvallis Association as the Advisory Committee for the economic improvement district. The City may designate the Advisory Committee to allocate expenditure of the funds generated by the district for economic improvement activities within the scope of the project."

The DCA, which administers the EID, has 11 board members and an executive director. Participation in the EID is set for five year increments, but with request businesses can opt out of the EID during a term, after which point they will no longer pay-in via property taxes.







FIG. 2

**Revenue Sources, Rates And Budget**

As is common with Economic Improvement Districts, revenue comes from taxing property owners, who opt-in to the program. The EID applies a fee of \$1.25 per \$1000 of assessed value for all participating commercial buildings within the boundary. The maximum taxable amount is set at \$3,500 per year with “Levy assessments in the Economic Improvement District in any year (not) exceed(ing) one percent (1%) of the Assessor’s Real Market Value of all the real property located within the district.” The ordinance officializing the newest iteration of the EID was established in 2017 and runs through 2022.

Costs for the improvement activities undertaken with funds from the EID (listed in detail below) were estimated at around \$60,000 a year (With 71% of containing businesses opting into the program, estimated revenue for 2017 was \$57,570.)

**Key Characteristics Of Expenditure**

As per the 1993 ordinance, (renewed in 2017): “The funds generated by the proposed economic improvement district shall be used for the planning or management of development or improvement activities; landscaping or other maintenance of public areas; promotion of commercial activity or public events; activities in support of business recruitment and development; and improvements in parking systems or parking enforcement; and to fund administrative and miscellaneous costs incurred in furtherance of the above-referenced activities.”

The DCA has three advertised goals for the EID: Keeping Downtown Vibrant; Revitalizing Our Neighborhood; and Revitalizing our Future. The work of the EID in support of the aforementioned goals has provided these amenities to DCA Members and members of the EID: Business Advocacy; Business Consulting/Advising; Zero % Interest Loan Program; Long-Term Parking Plan; Economic Development Projects; Free Brown Bag Workshops; Business Recruitment and Retention Programs; Business Education Seminars; Group Advertising Rates; Downtown Image Campaign Marketing.

### **Recommendations For Troutdale**

In conversation with Marlee and Chris, Troutdale has looked at establishing a Main Street Program to advise and maintain the street improvement funds generated from an implemented EID or BID. While this is a viable option, Corvallis' longstanding Downtown Association offers a separate avenue for how to direct and maintain their EID. Like a main street program, their Downtown Corvallis Association has expanded its support of businesses over time (as laid out under the aforementioned Key Characteristics of Expenditure) for participating EID/DCA members and it would be curious if the rules and challenges of earning a Main Street Program designation would bring the same levels of supports. What of these services offered by the DCA can be offered by Troutdale? Are there any services which a Main Street Program can offer that a non-profit downtown association cannot and vice versa? In addition, Corvallis has had more than 25 years for the DCA to expand their services, of services that Corvallis currently offers that Troutdale does not, what is a reasonable time frame for being able to offer these services and what partnerships would be needed to do so?

It would also be intriguing for Troutdale to examine the wider economic development landscape in Corvallis, especially taking the time to examine their City/County partnership at the Corvallis Benton County Economic Development Office. Would a wide-angle approach, potentially involving Fairview, Gresham, or other surrounding communities be beneficial to Troutdale? It is worth looking at what an economic development partnership might bring to the area as a whole.

Overall, Corvallis' DCA and EID have provided stability and growth for it's downtown corridor. While many downtowns have struggled Corvallis has maintained a strong identity and a fairly bustling downtown throughout periods of economic instability. Studying their successes, and the similarities between the cities, I believe can provide meaningful insight for Troutdale.

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