

# memo

To: Daniel Constantino, Jarret Walker + Associates  
From: Carole Richardson, Plangineering  
CC:  
Date: January 5, 2017  
Re: Josephine Community Transit  
Current and Potential Funding

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## **BACKGROUND**

Plangineering is a subconsultant to Jarret Walker + Associates, as part of a contract with Josephine Community Transit (JCT) to develop a transit master plan. The master plan is intended to guide development and expansion of the transit system serving the greater Grants Pass area in Josephine County, Oregon from 2015 to 2040.

As part of the planning team's existing conditions analysis, Plangineering was asked to review funding sources currently used by JCT to provide fixed-route transit service, and to identify potential future sources of funding. This memorandum provides an overview of current funding sources and issues for JCT, and outlines alternate revenue sources which may ultimately help to implement recommendations that evolve from the current planning study.

### **Limitations of This Report**

Our work relies upon information in Oregon Revised Statutes (2015) related to special districts. These statutes have been reviewed for relevance to potential funding scenarios for JCT; however, interpretation and suggestions offered herein are not intended to substitute for legal advice.

### **Document Overview and Organization**

This funding review is organized into four parts:

First, a summary of current funding sources used by JCT is provided, based on budget information provided for fiscal year 2016-2017.

Next, a summary of additional grants and other alternative revenue sources is provided. This information may be useful if JCT and its constituents decide to continue using a grant-based approach to transit funding for the foreseeable future.

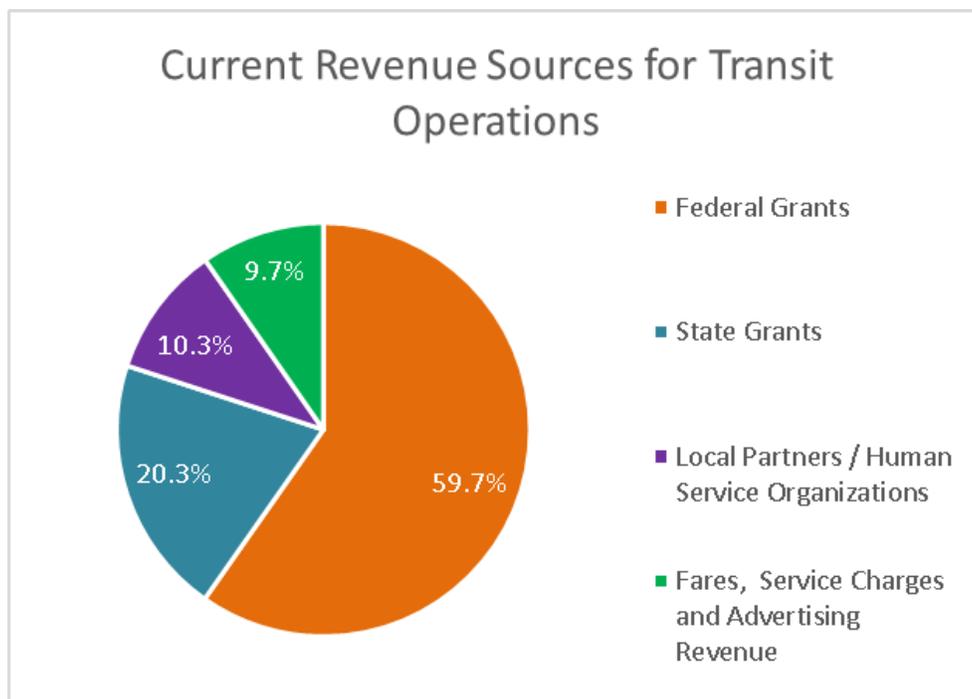
Third, an overview of local revenue generation options currently available to Josephine County and cities served by JCT is provided.

Last, we examine the potential for creation of a new transit district in the region.

## CURRENT FUNDING SOURCES AND ISSUES

JCT's current operations budget is roughly \$1.75 million annually. A review of JCT's budget for fiscal year 2016-2017 indicates that the current transit program is heavily grant-dependent (Figure 1). Approximately \$1.36 million, or 80%, of JCT's operating revenue comes from federal and state funding sources. Local partners such as the Rogue Community College and various human service agencies contribute approximately \$175,000, or 10.3%. The remaining \$165,000, or 9.7% of current operating revenue, is attributable to fare box income, dial-a-ride fees, and a small amount of income for on-bus advertising.

Figure 1. Current Revenue Sources for Transit Operations



Source: JCT budget for FY 2016-2017, excluding capital, planning and pass-through funding.

In addition to operational funding, JCT's current budget shows an additional \$465,000 in federal grant funding and \$235,000 in state funding for capital projects, and the agency has also received Federal 5305 transit planning funds through ODOT for the current transit master planning study.

JCT's budget is included as Attachment A, and a summary of current revenue sources is provided below.

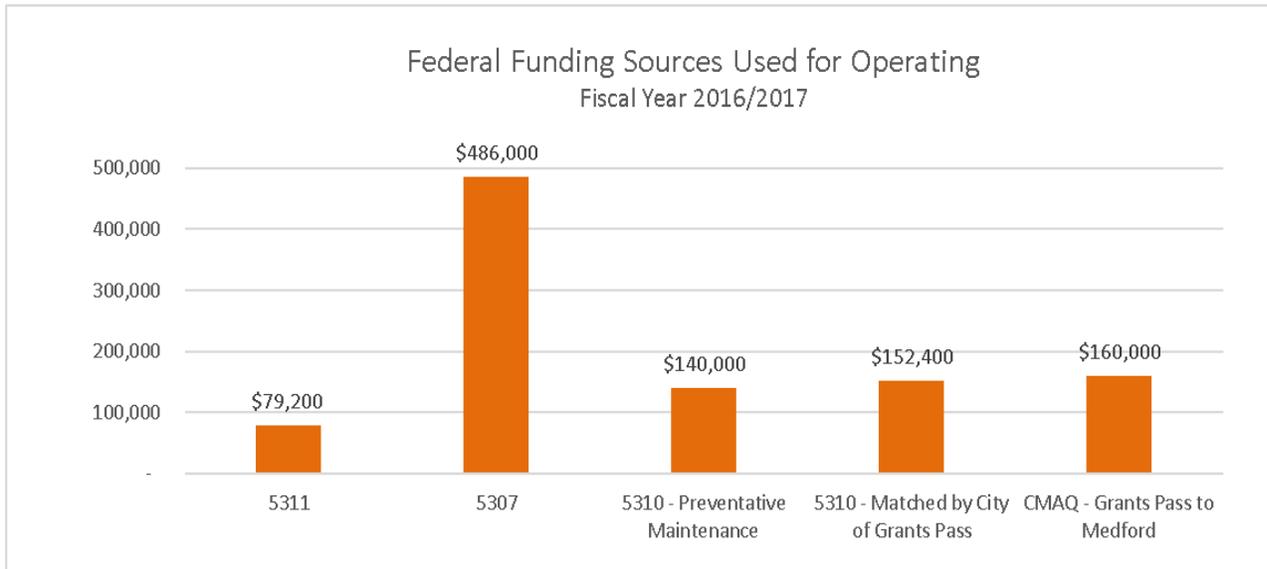
### State and Federal Grants

#### Federal -Aid Funding Programs

Nearly 60% of JCT's current funding for transit operations comes from the federal funding sources shown in Figure 2. An overview of each program follows.

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Figure 2. Federal Funding Sources for Operating



**Section 5307 Funding.** The Federal Transit Administration provides an annual transit funding allocation to regions with urbanized populations of 50,000 or more. This program is known as Section 5307 funding, which refers to the section of US Code (49 U.S.C. 5307) that describes the formula used to allocate transit funding to urbanized areas.

Josephine County is the designated recipient of Section 5307 funding for the urbanized area that includes Grants Pass, Gold Hill, Rogue River and adjacent parts of Josephine and Jackson Counties, also known as the Middle Rogue metropolitan area. Approximately \$746,000 in Section 5307 funding is made available to this metro area annually.

Once appropriated, 5307 funds must be used within five years. However, to access Section 5307 funding, JCT must find matching funds from non-federal sources. The match requirement varies according to how the funds are intended to be used:

Nationally, capital purchases require a 20% non-federal match; in Oregon, however, ODOT’s Rail and Public Transit Division provides state funding to reduce the local match requirement to 10.27%

Vehicle-related equipment needed to comply with the Americans with Disabilities Act and the Clean Air act must be matched at 10%.

Funds used for operating require a 50% non-federal match.

A significant challenge with JCT’s current funding structure is a lack of non-federal matching funds for Section 5307 and other federal-aid programs. JCT is unable to leverage its full 5307 allocation due to a lack of local revenues for transit. For FY 2016-2017, JCT has been able to access only \$486,000 (about 65%) of its available 5307 allocation. The region has accrued approximately \$645,000 in unused 5307 funds, which will remain unavailable to JCT without additional non-federal revenue to match them.

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**Section 5311 Funding.** 49 U.S.C. 5311 establishes formula grants to support public transportation outside of urbanized areas. Funds may be used for planning, capital, operating, and job access and reverse commute projects.

5311 program funds are apportioned only to the state level. To access these funds, transit providers such as JCT must submit a competitive application to ODOT. Nationally, the non-federal match requirement for the 5311 program is 50% for operating and 20% for other uses. In Oregon, however, ODOT provides state funding to reduce the match requirement across for program applicants across the board. Current local match requirements for the 5311 program in Oregon are:

- Operating: 43.92%
- Capital and Preventive Maintenance: 10.27%
- Mobility Management: 10.27%
- Project Administration: 10.27%
- Planning: 10.27%

In recent years, JCT has secured approximately \$79,000 annually in 5311 funding.

**Section 5310 Funding.** The 5310 program provides funding to assist with meeting the needs of older adults and people with disabilities. A variety of services and capital projects are eligible for these funds. Projects funded with 5310 funding must benefit seniors and disabled people, but do not necessarily need to provide exclusive service to these populations. Many services provided to the general public are also of significant benefit to senior and disabled populations.

JCT uses 5310 funding to assist with preventative maintenance (approximately \$140,000 annually) and to help support fixed route services for these target populations in Grants Pass (approximately \$152,000 for FY 2017-2017). In Oregon, there is a 10.27 local match required to access 5310 funding. The City of Grants Pass helps to match a portion of JCT's 5310 funding.

**CMAQ Funding.** Congestion Mitigation Air Quality (CMAQ) funding is provided by the Federal Highway Administration (FHWA) to help reduce traffic congestion and improve air quality in areas that do not meet National Ambient Air Quality Standards for ozone, carbon monoxide levels or particulate matter. When the Clean Air Act was amended in 1990, the Grants Pass area was designated nonattainment for PM-10 (particles with a diameter of 10 micrometers or less). Since 2003, the region's air quality has been in "maintenance" status regarding PM-10, making it eligible for CMAQ funding.

These funds can be used for transit investments, as well as a variety of other strategies. While transit operating assistance is available through the CMAQ program, it is limited to three years and applications must typically show an increased air quality benefit beyond current operations -- for example, adding a new route, expanding service into a new area, or offering a new type of service.

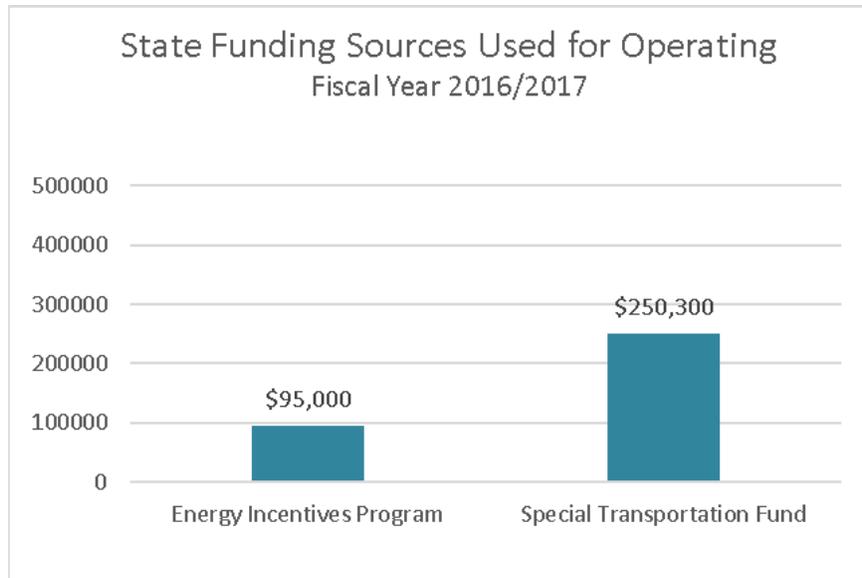
JCT successfully secured \$480,000 in CMAQ funding (\$160,000 annually for three years) for a pilot project to add service between Grants Pass and Medford. These funds will expire in 2018 and an alternate source of funding will be need to be identified if the service is to continue.

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**State Grants**

State funding sources shown in Figure 3 comprise over 20% of JCT’s operational funding. Because funds from these programs originate from state taxes and other non-federal revenue sources, they may generally be used to match federal-aid programs. A brief overview of each state program is provided below.

*Figure 3. State Grants for Operating*



**Energy Incentives Program.** About \$95,000 of JCT’s current operating revenue comes from tax credits under a previous Transit Service Energy Incentives Program offered by the Oregon Department of Energy (ODOE). Under this program, transit agencies could apply for tax credits for transit services that demonstrated a reduction in fossil fuel use from driving alone. Tax credits could then be sold to a private business in exchange for cash, providing additional operating funds for the transit agency, and allowing the business to pre-pay their state taxes at a discounted rate. Along with getting a guaranteed return on their investment, an additional incentive for investors who purchased the credits was that their tax dollars remained circulating in their local economy, helping to sustain local jobs and their own prosperity.

To be eligible for tax credits, a transit agency had to demonstrate that their service provided an energy savings of at least 10 percent compared to the equivalent energy use of single occupant vehicles. The value of the tax credits sought could not exceed 15% of the cost of providing eligible service.

Effective use of this program was not without challenges. In addition to application and review fees, transit agencies were required to have a CPA certify actual costs for materials, equipment and labor for eligible service, and tally the number of jobs that were created or sustained with their service during the performance period. There were federal capital gains considerations for some pass-through partners. Also, a period of low interest rates during and following the national recession made the ultimate rate of return for pass-through partners low, reducing the incentive for private businesses to purchase the tax credits. While these challenges discouraged many small to mid-size transit agencies from applying, JCT’s

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strategic use of a broker to help market and sell their credits allowed them to use the program to its maximum advantage.

JCT's current budget includes \$95,000 from this program, which is roughly based on 15% of the agency's operating budget minus federal and state revenues. With each legislative cycle, energy incentives offered by the ODOT have changed, and unfortunately ODOE's program to provide tax credits for transit operations sunsets in 2017. ODOE currently offers a program for alternative fuel vehicles and alternative fuel infrastructure projects; however, this program also ends in 2017.

ODOE's programs are continuously evolving, and it is likely that JCT will be eligible for future rounds of energy tax credit offerings. JCT is continuing to monitor legislative activities related to energy programs to be ready for new solicitations from the ODOE.

**Special Transportation Fund.** ODOT's Special Transportation Fund (STF) provides financial support for a variety of operational activities and capital projects. STF moneys originate entirely from state sources, including cigarette tax revenues in Oregon, sales of photo ID cards and other ODOT funding, allowing them to count toward the matching requirements in federal-aid programs. The primary purpose of STF funding is to support projects that benefit seniors and people with disabilities. However, this does not mean that STF funding must be used for projects and services that are exclusive to these groups, since many services provided to the general public are of significant benefit to senior and disabled populations.

The STF is divided into a formula program and a discretionary grant account. JCT receives roughly \$250,000 annually in STF formula funding, which is based on the population of JCT's service area compared to the state's total population.

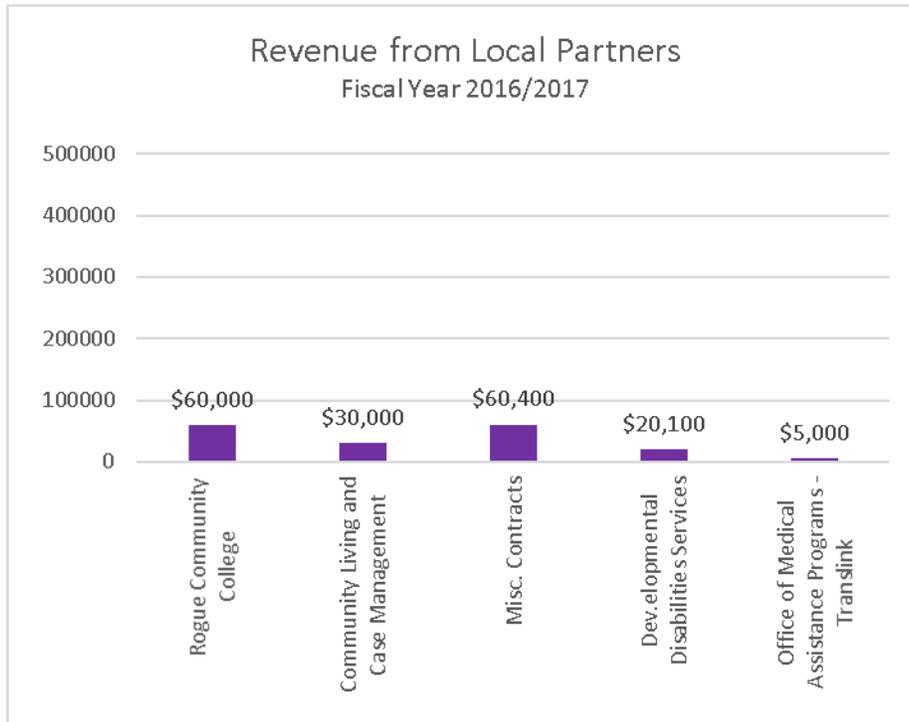
The STF discretionary grant account requires a competitive application and is available only for discrete projects that are listed in an agency's Coordinated Plan. JCT does not currently have a project using STF discretionary funding.

### **Funding from Local Partners**

Figure 4 shows current revenue from local partners and human services agencies. Collectively, these smaller income sources net JCT roughly \$175,000 annually. These funds can generally be used to match federal-aid programs, provided that partner funding does not originate from federal sources authorized under Title 49 of U.S. Code.

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Figure 4. Funding from Local Partners



**Income from Fares and Other Service Charges**

Figure 5 shows fare box revenue and other program income generated by JCT. Fare box revenue and other fees that are charged for services that are funded with federal-aid cannot count toward federal aid match requirements.

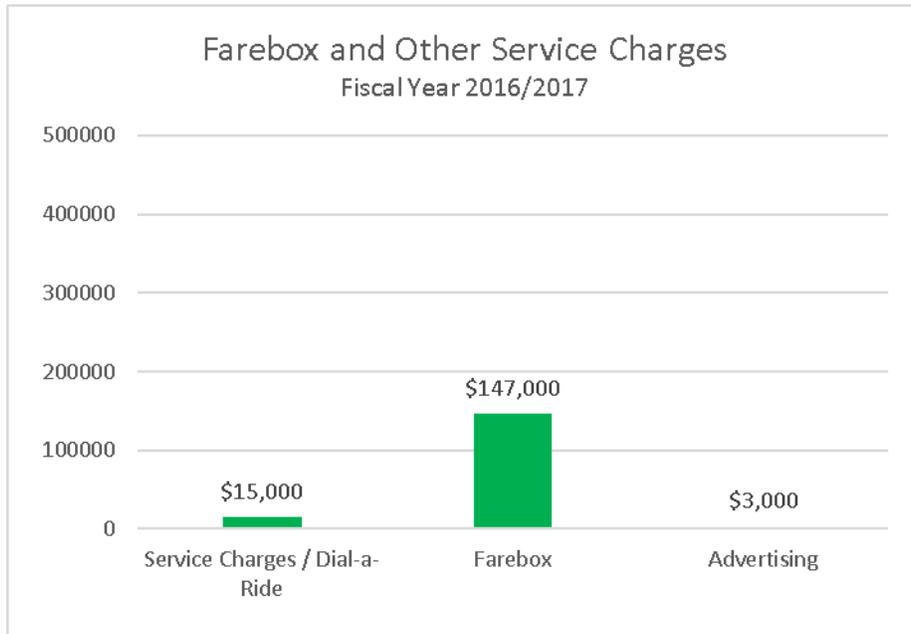
Fare income for JCT’s fixed-route service yield vary as ridership fluctuates. For fiscal year 2016/2017, JCT estimates fare box income of \$147,000, an increase over the previous year’s actual intake of \$92,300 due to higher anticipated ridership on the Rogue Valley Commuter Line and other JCT services.

Service charges for JCT’s Dial-a-Ride program are expected to yield \$15,000 in the current fiscal year.

JCT sells a limited amount of advertising space on the exterior of their coaches, which is anticipated to yield approximately \$3,000 for the current fiscal year. The agency has been considering contracting with a third party to implement and manage an on-bus advertising program, potentially increasing advertising revenue to about \$15,000 annually.

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Figure 5. Income from Fares and Service Charges



### Analysis of Current Funding Strategies

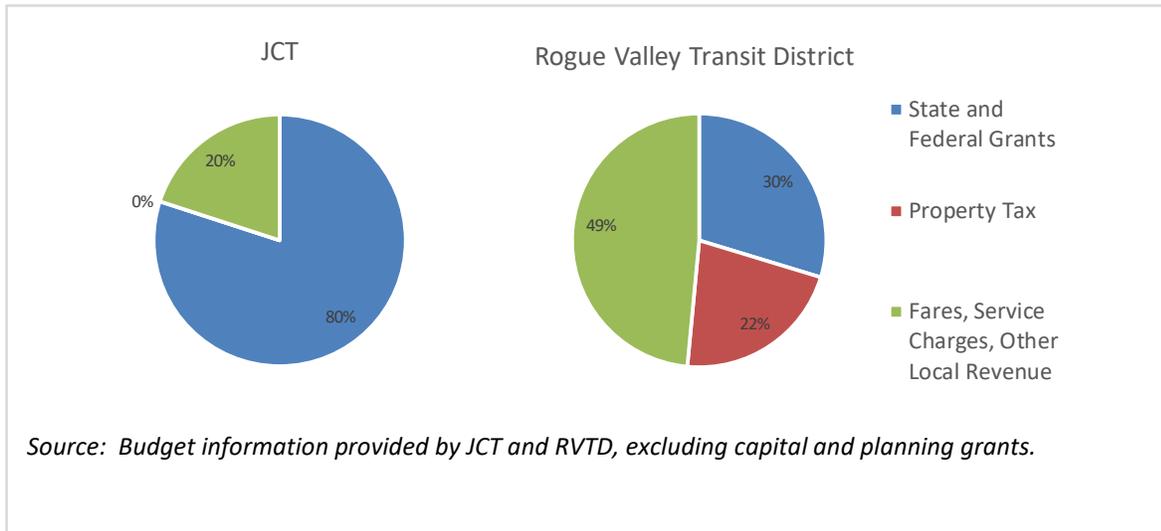
An evaluation of JCT’s current approach to funding indicates the agency is doing an exemplary job of leveraging limited resources to maximize available funding opportunities. JCT is modeling tactics that take full advantage of lower federal-aid match rates for preventative maintenance in the 5311 program and capital projects in the 5307 program to minimize the agency’s overall match requirement.

JCT’s management staff has also found strategic ways to take advantage of intermittent state programs such as ODOE’s Energy Incentive Program. The agency has been vigilant, forward-thinking and proactive as state and federal funding programs change and new programs emerge.

A significant disadvantage for JCT, however, is a lack of locally-generated revenue. Figure 6 shows a comparison of operating revenue (excluding capital grants) for JCT and neighboring Rogue Valley Transit District (RVTD). RVTD has a revenue structure typical of transit agencies serving small to mid-size metropolitan areas, whereas JCT is significantly more grant-dependent.

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*Figure 6. Comparison of JCT Revenue Sources with Rogue Valley Transit District*



This is concerning from several standpoints:

Lack of a reliable, self-supporting revenue source is not conducive to the organization's long-term financial stability and resiliency. The fact that two existing sources of grant funds are at risk of disappearing in the next two years (CMAQ and ODOE) demonstrates the vulnerability of grant-dependent funding.

JCT does not currently have adequate non-federal matching sources to access the full amount of federal funding available for transit in the region. Each year, the agency is forced to leave \$200,000 to \$300,000 on the table due to a lack of local match availability.

There is little to no financial capacity for growth and expansion of the transit system as population and demand for service increases.

The next three sections of this report examine potential alternate sources of revenue which could help to diversify JCT's financial portfolio.

## **ADDITIONAL GRANT RESOURCES**

Several smaller sources of public and private grant funding may be within reach in the future; however, since JCT is currently accessing the most lucrative federal and state grant funding programs for transit, a focus on additional grants is not likely to significantly improve JCT's financial position overall.

Nonetheless, a scan was performed to identify alternate funding sources that may be of interest to JCT for individual projects and initiatives. Attachment B includes a broad listing of potential grant resources from government and private sources that are available for transit-related projects.

Private funding sources typically offer one-time grants which can sometimes be used as local matching funds for a larger federal-aid application. This approach is most effective for funding capital needs or a specific project with a limited duration. Also since many private grantmakers require applicants to have

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private non-profit certification with the Internal Revenue Service, partnerships with local non-profit organizations may be needed to access some of the funding opportunities outlined in Attachment B.

Most private grantmakers do not fund operational proposals and require applicants to have private non-profit certification with the Internal Revenue Service. In Oregon, however, a notable exception is the Meyer Memorial Trust, which does provide grants to governmental agencies, and may fund operating proposals for periods of up to three years. Currently, two programs offered by the Trust (“Building Communities” and “Healthy Environment”) align well with transit initiatives.

## **LOCAL REVENUE OPTIONS FOR EXISTING GOVERNMENT AGENCIES**

### **City and County Taxes**

Cities and counties have the ability to levy property taxes for either operating or capital purposes. A vote of the people is required before such assessments can take effect.

There are two property tax avenues open to local agencies for raising transit operating funds:

- **Permanent property tax increase.** A permanent property tax rate increase is possible, subject to a total property tax limitation of no more than \$10.00 per \$1,000 of market value (exclusive of any general obligation bond levies).<sup>1</sup>
- **Local option tax.** A local option tax can be structured as either a fixed dollar or fix rate tax, and levied for up to a maximum of five years. If a fixed dollar tax is levied, each property is assessed the same amount each year. If a fixed rate option is used, the tax is levied as a maximum rate per \$1,000 assessed value and the amount to be raised must be estimated for each year. Both types of local option levies are subject to the same limitation as permanent property tax increases described above.

For capital purposes, a local option property tax can be levied for up to 10 years (subject to the same property tax rate limitations described above). General obligation bonds can also be levied to cover annual principal and interest payments on capital investments, and are not subject to the maximum rate limitation.

Josephine County’s Summary of Assessment and Levies (SAL) for Tax Year 2016-2017 indicates that property taxes within the City of Grants Pass are currently “in compression”. That is, current tax rates exceed the constitutional cap on total property taxes of \$10 per \$1,000 value, so taxes are compressed (reduced) to the maximum allowed. This is not uncommon; in fact, Oregon Department of Revenue statistics for the 2015-2016 fiscal year show that every county in Oregon experienced some level of tax compression. However, it is important to recognize that a new permanent or local option tax for transit operations could result in further compression (reduction) of other existing district assessments within the City of Grants Pass. This would include taxes currently levied by Josephine County, 4-H/Extension,

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<sup>1</sup> The Oregon Constitution contains several provisions on property tax limitations. Per Ballot Measure 5, passed in 1990, local governments are limited to billing each property tax account no more than \$10.00 per 1,000 of market value plus any voter approved general obligation bonded debt (school districts have a \$5.00 limit). Ballot Measure 50, adopted in 1996, governs market and assessed values used for property tax assessment.

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Southern Oregon Educational Service District, Rogue Community College and the City itself. A new permanent or local option tax proposed to fund transit operations may be met with resistance from these current taxing districts.

### City Transit Operations Fee

A unique approach to transit funding has been implemented in the City of Corvallis, which is similar in size to Grants Pass. To fund the Corvallis Transit System, the City charges a monthly fee to all City utility customers, including residential as well as commercial and industrial users. These fees generate revenue to support transit operations. Fees are modest (2.75 per month is added to the water bill for a single-family residence, and \$1.90 per month for a multi-family unit). A portion of revenues from the transit operation fee replaces fares, enabling completely fareless transit service within the Corvallis city limits. Money raised is dedicated for transit purposes and cannot be used for other purposes. Additional information is provided as Attachment C.

## NEW TRANSIT DISTRICT OPPORTUNITY

Future funding efforts should be focused on ways to fully leverage the region's current 5307 allocation and reduce JCT's overall dependency on grants. Formation of a transit district with taxing authority would accomplish both objectives, improving financial resilience and stability as state and federal funding conditions change.

The following analysis is based on a review of state statutes related to district formation, structure and assessment types. We have also included a preliminary estimate of tax rates that would be needed to fully leverage the region's current 5307 allocation under several different funding scenarios and assessment frameworks.

### Applicable Statutes

Laws related to the formation of a new transit district are found in four major sections of the Oregon Revised Statutes:

**ORS 198 – Special Districts Generally.** ORS 198 provides general provisions applicable to all types of special districts. These statutes determine how the geographic area of a districts may be defined, and they outline the administrative procedures that must be followed to create a district and set a permanent rate for operating taxes.

**ORS Chapter 451 County Service Facilities.** A county service district could be established for public transportation purposes.

**ORS 267.010 to 267.334 Mass Transit Districts.** The mass transit district statutes describe the formational processes used in Portland, Eugene and Salem. They are relevant for use in metropolitan areas. While the Middle Rogue metro area served by JCT is smaller than areas that have used ORS 267.010-267.334 in the past, these laws could nonetheless be used to form a new transit district for the region.

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**ORS 267.510 to 267.650 Transportation Districts.** The transportation district statutes describe the formational process typically used outside of large metropolitan areas. The region would also have the option to use these statutes to form a new district.

For the sake of clarity in this memo, a district formed under ORS 451 is referred to as a county service district, and a mass transit or transportation district formed under ORS 267 is referred to as a special district.

### Geographic Considerations

ORS 198.720 specifies that districts may consist of contiguous *or noncontiguous* territory located in one or more adjoining counties. It should be theoretically possible, for example, to have a county service district or a transportation district that includes the cities of Cave Junction and Grants Pass, while excluding rural areas between.

Geographic considerations for a mass transit district under current statutes are interpreted to be more restrictive. ORS 267.080 says that the territorial jurisdiction of a mass transit district “may include all territory within the geographic boundaries of every Oregon county in the metropolitan statistical area”. The statutes used to form Salem’s transportation district (ORS 267.107) simply limit the district to the area inside the city’s urban growth boundary.

### County Service District

A county service district is formed by order of the county commissioners, and must be referred to the voters for approval (ORS 451.487). The County Commissioners would oversee a county service district and there would be no separate governing board.

A county service district for public transportation could establish a dedicated funding stream for transit; however, this approach would not offer any new financing tools. To finance a county service district, Josephine County would be authorized to use the same methods that are available for financing all other county service facilities, including property taxes, sale of bonds, and service or user charges.

### Special District Options

#### Mass Transit District v. Transportation District

From a practical standpoint, the differences between the mass transit district statutes in ORS 267.010 to 267.334 and the transportation district statutes in ORS 267.510 to 267.650 boil down to four major areas:

- Mass transit districts are structured to serve metropolitan areas. Transportation districts offer a broader geographic reach.
- Both approaches allow the same financing mechanisms; however, if a property tax is assessed, it is capped at 0.5% (0.005) per year under the transportation district statutes. There is no cap under the mass transit district statutes. (A 0.5% cap may not be a problem for JCT, since analysis of potential property tax revenues indicate a much lower rate would likely satisfy current funding needs. And if the new district elected a financing option that did not involve a property tax assessment, then of course the cap becomes irrelevant.)

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- Under the mass transit district statutes, districts can designate a separate service area that is benefited beyond the general benefit to the overall district. Financing methods can then be imposed within that service area rather than in the entire district. This provision would offer flexibility if, for example, a district was envisioned that covered the entire area within the Grants Pass UGB, with the primary service area and corresponding tax burden assigned to areas inside the current city limits.
- Under the mass transit district statutes, directors are elected from seven sub-districts, each roughly equal in population, and each director must reside within the district he or she represents. Under the transportation district statutes, seven directors are elected from the district at-large.

The mass transit district statutes have one set of provisions used in Portland and Eugene (ORS 267.085 to 267.097), and another used in Salem (ORS 267.107 to 267.115). Neither set of statutes may be ideal for the Middle Rogue metro area, so if the region elects to proceed with formation as a mass transit district rather than a transportation district, an additional legislative amendment could be considered to refine the existing laws.

## Special District Formation

### *Initiating the Formational Process*

The formational process begins with either a petition signed by 15% of the electors (ORS 198.755) or a resolution adopted by the most populous city (ORS 267.085, 267.107 and 267.520) within the potential district territory. The petition or resolution is forwarded to the principal county, and the county commission holds a hearing to determine whether there is a benefit to forming the district. If they do find a benefit, the process can proceed with or without an election.

### *Special District Formation without Election*

It is possible to form a new special district without a vote of the people. However, this should only be done if no assessment of taxes will be needed to permanently finance the district's operation.

If the region wished to form a special district without taxing authority, then after an initial hearing and finding of benefit by the county commission, the county would issue an order calling for the district to be formed. Before a final hearing is held on the matter, if the county received written election requests from at least 100 people, then an election would need to be held. If less than 100 written requests were filed, then the county could proceed with a final hearing and enter an order creating the district.

Although a district may be formed without an election, board member elections must be held on the next special election date (second Tuesday in March; third Tuesday in May; third Tuesday in September; or first Tuesday after the first Monday in November.)

In JCT's case, since the primary purpose and motivation for creating a special district would be to secure a stable and reliable source of funding, proceeding without transparency on the matter of financing is not recommended. There are few advantages to forming a district without an election and then later seeking voter approval of an operating tax. Because the public's trust in government is a fragile thing, there may also be significant political risks with this approach. It is easy to lose credibility with voters who may perceive that a formational process is attempting to circumvent them, and very hard to earn back their trust.

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*Special District Formation Concurrent with Election*

To establish a permanent rate for operating taxes and/or a separate property tax for capital funding, an election must be held per ORS 198.810. A proposed rate structure could be included in the petition or resolution for district formation, and voters could be asked to approve the district and the tax rate on the same ballot.

We recommended this as the most upfront approach with voters. Patience is prescribed, however, since more than one election cycle is often required to obtain voter approval when new taxes are proposed. Complete transparency is key, including a compelling message on the need, and a clear statement of anticipated benefits.

**Revenue Generation Options for Special Districts**

Mass transit districts and transportation districts have broader authorities for revenue generation than county service districts. Financing methods can include:

- Property taxes
- Not to exceed 0.5% (0.005 per dollar of assessed property value) per year for transportation districts. No statutory limit for mass transit districts.)
- Revolving fund – a one- year, maximum 0.0015 property tax, to be used only for planning and construction, acquisition, purchase or lease of transit system (not for operating)
- Business license fees
- Income tax
- Employer payroll and/or self-employment tax. Per ORS 267.385, a payroll tax cannot exceed 0.8% (0.008) of wages paid and 0.8% (0.008) of net self-employment earnings. Employers cannot pass this tax on to their employees. ORS 267.386 specifies that any increase must be phased in over a 10-year period, and each annual increment may not be more than 0.02% (0.0002) of wages and net self-employment earnings.
- Fares and service charges

Any combination of these may be used, and assessment strategies may also be combined with federal funding, bonds, and/or short-term borrowing against anticipated future revenue.

**Potential Revenue**

**Peer Agency Examples**

Currently in Oregon five transit agencies use property taxes as a permanent funding method for operations (Table 1) and three use a payroll tax approach (Table 2). Two other transit agencies, Grant County Transportation District and Coos County Area Transit Service District, appear to have district status but are not taxing districts.

Revolving funds accounts are commonly used to levy special assessments for discrete projects; however, business license fees and income taxes are not currently used by peer transit agencies.

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**Potential Revenue for JCT**

An analysis of tax assessment options under three potential funding scenarios (Table 3) indicates that rates needed for the region to completely match its federal 5307 funding allocation and allow for modest operational enhancements in the future would likely be low. Even under the highest funding level examined, which would completely match the region's full 5307 allocation for operations and allow for a 25% increase to the operations budget, tax rates under either a property tax or employer payroll tax approach would be lower than peer district assessments statewide.

Note that potential property tax revenue outlined in Table 3 may be subject to compression in some areas of Josephine County, such as properties located within Grants Pass.

The analysis provided in Table 3 excludes capital funding; however, a new district would also have the ability to levy special assessments for capital projects and programs.

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Table 1. Peer Agency Property Tax Assessments

District	County Population (2015 Est)	Property Tax Rate	Taxable AV	Estimated 2016-2017 Revenue	Source/Notes
<b>Rogue Valley Transportation District</b>	212,567	0.0001772	\$14,621,636,769.00	\$2,524,034.86	Jackson Co 2016-2017 Sal Reports
<b>Lincoln County Transit</b>	47,038	0.000974	\$6,882,552,873.00	\$6,703,606.50	Lincoln County Statement of Taxes for Year Ending June 30, 2016; Assessment Roll of 2015-2016
<b>Sunset Empire Transportation District</b>	37,831	0.00162	\$5,875,464,334.00	\$9,518,252.22	Phone call with County Assessor's office on 11-29-16
<b>Tillamook County Transportation District</b>	25,653	0.002	\$4,643,768,539.00	\$9,287,537.08	Tillamook County 2016 Reformatted SAL 6a Report, 2016-2017 Tax Rates by Code Area
<b>Salem Keizer Transit District</b>	330,700	0.0007609	\$13,691,685,340.00	\$10,418,003.38	Marion County SAL Table 4A 2016-2017

Table 2. Peer Agency Payroll and Self-Employment Tax Assessments

District	County Population (2015 Est)	Employer Tax Rate	Estimated Payroll Subject to Tax	Estimated 2016-2017 Revenue	Source/Notes
<b>South Clackamas Transportation District</b>	7,185	0.005	Not available	Not available	Employers are taxed at 0.5% of wages paid or 0.5% of net earnings from self-employment over \$400.
<b>Lane Transit District</b>	362,895	.0071	\$13,691,685,340.00	\$32,371,992.00	ltd.org/payroll-self-employment-tax-information. Rate is .0071 for 2016; .0072 for 2017, increasing .0001/year until 2025. County has annual payroll of ~\$4.5B (Census factfinder) for an estimated revenue of over \$32M.
<b>Tri-Met</b>	N/A	0.007337	Not available	\$325,000,000.00	Tri-Met 2016 Financial Report.

**Josephine Community Transit  
Current and Potential Funding, Cont.  
January 5, 2017**

Table 3. Sample Property Tax Rates for New District<sup>2</sup>

Funding Level	Description	Annual Revenue Target	Assessment Options and Tax Rates		
			Property Tax Options <sup>2</sup>		Employer Payroll Tax (County Wide)
			County-Wide	Grants Pass Only	
<b>LOW</b>	Operational tax would only cover the annual amount needed to access currently unused 5307 funding, for operations.	\$300,000	0.00004165	0.00009972	0.000459441
<b>MED</b>	Operations tax would completely match the full amount of the region's 5307 funding, for operations, freeing up some funding currently used as match for system enhancements and other uses.	\$746,000	0.00010356	0.00024798	0.001142477
<b>HIGH</b>	Operational tax would completely match the region's 5307 allocation for operations, and allow for a 25% operational budget increase.	\$1,183,500	0.00016430	0.00039341	0.001812496
<b>Assumptions:</b>	<i>County-Wide Assessed Property Value:</i>	<i>\$7,203,378,002</i>	<i>Source: Josephine County SAL 2016-2017</i>		
	<i>Grants Pass Assessed Property Value:</i>	<i>\$3,008,335,565</i>	<i>Source: Josephine County SAL 2016-2018</i>		
	<i>Josephine County Total Annual Payroll:</i>	<i>\$652,967,000</i>	<i>Source: Census Quick Facts Table, 2015</i>		
	<i>Grants Pass Total Annual Payroll:</i>	<i>not available, but could assume majority of county payroll is from urbanized area</i>			

<sup>2</sup> Rates shown in this table do not account for compression. If property taxes are in compression at the time that a new property tax is assessed for transit, the rate may need to be higher than shown to achieve the target amount.

## Strategic Options

Oregon statutes allow many different possibilities for structuring and funding transit service, as shown in Table 4 . For example, a countywide transportation district could be formed under ORS 267.510 to 267.650, but rather than a county-wide property tax, the district could use a payroll tax to concentrate the tax burden in urban areas where service benefits are greater. Or, perhaps the mass transit district formational process outlined in ORS 267.010 to 267.334 could be used to create a district confined to the Grants Pass metropolitan statistical area, with a modest district-wide property tax and a separate service area assigned for implementation of an employer tax.

After reflecting upon the many possibilities, JCT may wish to discuss options with a legal advisor. The project team is also available to participate in further discussions.

Table 4. Agency Structure and Operating Revenue Options

Operating Revenue Options	Transit Agency Options			
	Available to Existing Agencies	County Service District	Mass Transit District	Transportation District
Permanent Property Tax *	√		√	√
Local Option Property Tax (5-Year Levy for Operating) *	√	√	√	√
Fares and Service Charges	√	√	√	√
Business License Fee			√	√
Income Tax			√	√
Employer Payroll / Self Employment Tax			√	√
City Transit Operation Fee	√			

*\*Due to maximum property tax provisions in Oregon's constitution, a new permanent or local option property tax for transit could reduce taxes currently levied by other transit districts.*

**ATTACHMENT A – CURRENT JCT BUDGET**

Jo Co Transit ~ 25 Fund				
3510		2015-16	2016-17	NOTES
<b>Revenue</b>				
<b>GL</b>				
32100	Federal Grants	79,000	79,200	5311
32100	Federal Grants	486,000	486,000	5307
32100	Federal Grants	140,000	140,000	5310 - PM
32100	Federal Grants	136,700	152,400	5310 - PS (CityGP)
32100	Federal Grants	502,300	465,000	5339 - Capital
32100	Federal Grants	160,000	160,000	CMAQ - GP to Medford
32200	State Grants	90,000	95,000	EIP
32200	State Grants	-	100,000	TNC - Capital (HUB)
32200	State Grants	75,000	45,000	5305
32200	State Grants	-	135,000	STF D - Capital
32244	ODOT STF Formula	250,300	250,300	STF
32302	RCC Agreement	83,000	60,000	RCC
32500	Private Grants	30,000	30,000	CLCM
32500	Private Grants	60,400	60,400	Misc. Contracts
33108	Contractual Services	1,910,100	1,910,600	CMAQ - GP pass through (Sidewalks)
33100	Charges Serv/ Dial a ride		15,000	
33115	DD Services	35,000	20,100	
33136	OMAP Translink	36,000	5,000	Translink
33143	Public Transit	92,300	147,000	Farebox
33309	Advertising	-	3,000	Advertising
		<b>4,166,100</b>	<b>4,359,000</b>	
<b>Beginning Fund Balance</b>		<b>168,000</b>	<b>168,000</b>	
<b>Personal Services</b>				
41000	Salary	556,800	616,100	
42000	Benefits	331,800	384,300	
		<b>888,600</b>	<b>1,000,400</b>	
<b>Materials &amp; Services</b>				
43010	Office Supplies	6,000	6,000	General Office Supplies
43015	Operating Supplies	34,600	34,600	Specific Supplies consumed thru use
43045	Furniture/Equip (\$5000)	-	2,000	Coin counter
43055	Printing & Duplication	1,000	1,000	
44010	Advertising	2,000	6,000	
44020	Contracted Services	7,000	7,500	RouteMatch - hosting fees
44020	GP - CMAQ pass through	1,910,100	1,910,100	pass through of FTA
44035	Insurance	3,900	23,800	Insurance/WC charges
44050	Professional Services	134,000	98,000	Drug Screens / Vehicle Cleaning/ Trash Pickup/ DFTA
44070	Travel	600	1,300	Hotel/Meals/Mileage
44075	Education & Training	500	500	Registrations
45015	Communications	10,500	10,500	FCC Licensing/data plan for tablets/video repair
45030	BOM	20,300	20,500	Custodial Services
45035	Vehicle Maintenance	396,000	345,400	Motor Pool Chgs
		<b>2,526,500</b>	<b>2,467,200</b>	
45200	PW Transfer	3,700	6,700	Admin/Budget Oversight
45200	Interfund Transfer	150,500	155,700	ISF charges
45200	Capital	560,000	715,000	3 Vehicle / Software - RTVT / HUB - Bus stop downtown
		<b>714,200</b>	<b>877,400</b>	Real Time Vehicle Tracking
48100	Contengency	<b>204,800</b>	<b>182,000</b>	

**ATTACHMENT B – INVENTORY OF TRANSIT-RELATED FUNDING SOURCES FOR OREGON PROVIDERS**

## STATE AND FEDERAL FUNDING SOURCES

In 2012, Congress enacted new federal transportation funding legislation entitled “Moving Ahead for Progress in the 21<sup>st</sup> Century,” commonly known as MAP-21. An overwhelming majority of funding for transit systems and services in the country comes from this federal transportation act. Subsequent legislation passed in 2015, the “Fixing America’s Surface Transportation Act”, or FAST, reauthorized the programs established under MAP-21.

Provisions for funding programs administered by the Federal Transit Administration (FTA), and the Federal Highway Administration (FHWA), which are found in Title 49, Chapter 53 and Title 23 of the United States Code, respectively. While the lion’s share of transit funding is contained in Chapter 53, there are some transit funding opportunities within the Highway program in Title 23.

In general, most federal transportation funding that is available to public transit agencies will flow through the Oregon Department of Transportation (ODOT), except that in metropolitan areas federal 5307 funding is allocated directly to the urbanized area through a federal formula. A summary of federal programs for transit and highway, as well as information on ODOT’s Enhance program, follows.

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## FEDERAL TRANSIT FUNDING

### 5307 – Urbanized area formula funding

- Funding is made available to incorporated areas with a population of 50,000 or more that is designated as an urbanized area by the U.S. Census Bureau
- For urbanized areas under 200,000 population, funds are apportioned to states for distribution, and the formula is based on population and population density.
- For urbanized areas over 200,000 population, funds flow directly to a designated recipient of local government, and the formula is based on a combination of bus revenue vehicle miles, bus passenger miles, fixed guideway revenue miles and fixed guideway route miles as well as population and population density.
- A non-federal match is required for access to these funds. The federal share is not to exceed 80 percent of the net project cost for capital expenditures. The federal share may be 90 percent for the cost of vehicle-related equipment attributable to compliance with the Americans with Disabilities Act and the Clean Air Act. The federal share may not exceed 50 percent of the net project cost of operating assistance.

Public Transit Agencies are eligible for the following Federal Transit Administration funding programs, which are administered by states.

### 5310 - Enhanced mobility of seniors and individuals with disabilities

- Can be used for projects that improve access to fixed route service and decrease reliance by individuals with disabilities on paratransit.
- Capital 80%; Operating 50%
- Projects must be identified within a Coordinated Public Transportation Human Services Transportation Plan

### 5311 - Rural formula funding

- Amount that comes to Oregon is dependent on vehicle revenue miles.
- Includes \$25M for tribes by formula and \$5M discretionary
  - *A recipient that is an Indian tribe may use funds apportioned under this subsection to finance public transportation services provided by a non-tribal provider of public transportation that connects residents of tribal lands with surrounding communities, improves access to employment or health care, or otherwise addresses the mobility needs of tribal members.*
  - Award amounts based on revenue miles
  - \$300K annual max per tribe
- Data collection required
  - Annual revenue
  - Sources of revenue

- Total annual operating costs
- Total annual capital costs
- Fleet size and type, related facilities
- Vehicle revenue miles
- Ridership levels
- Capital 80%, operating 50%,

#### **5311(f) - Intercity**

- 15% of the state's 5311 funds must go to intercity service
  - Planning and marketing for intercity transportation
  - Capital
  - Operating through purchase of service agreements, etc.
  - Coordinating rural connections between small public transportation operations and intercity bus carriers

#### **5312 - R&D, demonstration and deployment**

- Mobility management and improvements
- Travel management systems
- Data and communication system advancements

#### **5314 - Technical Assistance (\$7 million nationally)**

- Technical assistance
- Standards development
- May not exceed 80% of the cost of an activity

#### **5315 - Private sector participation**

- USDOT is directed to identify impediments and come up with best practices for promoting partnerships with private providers
- They have 1 year to do it
- No funding is available to states under this section

#### **5319 - Bicycle facilities**

- Providing shelters and parking facilities for bikes near transit facilities
- Installing equipment for bikes on buses
- 90% of the cost of the project

#### **5326 - Transit asset management**

- Will be a future requirement for recipients to manage capital assets and prioritize investments.
- There will likely be a technical assistance program for it.

**5339 - Bus and bus facilities formula grants**

- Federal share is 80% of the net capital project cost
- Each state will receive \$1,750,000 for each fiscal year

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## *FEDERAL HIGHWAY FUNDING*

There are opportunities for transit funding within the following federal highway programs. Funds from these programs are managed by ODOT, and are the basis for ODOT's Enhance program.

### **Surface Transportation Block Grant Program (STBG)**

- Over \$11 billion annually in national flexible funding. Non-motorized transportation facilities, transit capital projects, and public bus terminals and facilities are eligible.

### **Transportation Alternatives Program (TAP)**

- Construction, planning, and design of on-road and off-road trail facilities for pedestrians, bicyclists, and other non-motorized forms of transportation, including sidewalks, bicycle infrastructure, pedestrian and bicycle signals, traffic calming techniques, lighting and other safety-related infrastructure, and transportation projects to achieve compliance with the Americans with Disabilities Act of 1990.
- Construction, planning, and design of infrastructure-related projects and systems that will provide safe routes for non-drivers, including children, older adults, and individuals with disabilities to access daily needs.

### **Federal Lands and Tribal Transportation Programs**

- Eligible: Operation and maintenance of transit programs and facilities that are located on, or provide access to, tribal land, or are administered by a tribal government.
- Also funds planning, design and construction of non-motorized facilities.
- \$465 million nationally for projects that improve access through and within Tribal lands.

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## *ODOT ENHANCE PROGRAM*

ODOT has established two programs to manage funds which flow to the state from the Federal Highway Administration: “Fix-It” and “Enhance”.

The Fix-It program includes projects designed to maintain the existing system, such as pavement preservation, safety and bridge projects. Fix-It projects are prioritized by technical experts at ODOT based on highway system condition and operating data.

The Enhance program provides funding for a variety of transportation projects, including:

- Modernization/expansion of the transportation system
- Transportation demand management (including transit)
- Transportation enhancement
- Bicycle and pedestrian facilities
- Recreational trails
- Safe Routes to Schools
- Scenic Byways
- Protective right of way purchases
- Public transportation (capital projects only, not on-going operations.)

Project planning, design and construction are eligible activities for Enhance funding.

Applications for Enhance projects are submitted to ODOT regional offices, and then prioritized by the appropriate Area Commission on Transportation (ACT).

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## *OREGON TGM PROGRAM*

The Transportation Growth Management (TGM) Program is a joint effort of two state agencies: the Oregon Department of Transportation (ODOT) and the Oregon Department of Land Conservation and Development (DLCD). The mission of TGM is to support community efforts to expand transportation choices. By linking land use and transportation planning, TGM works in partnership with local governments to create vibrant, livable places in which people can walk, bike, take transit or drive where they want to go.

TGM supports local government planning that accomplishes one or more of the following objectives:

- A transportation system or development pattern that results in a balanced, multi-modal transportation system that increases and enhances opportunities for walking, bicycling, or using public transportation.
- Increased opportunities for those who have difficulty obtaining transportation because of age, income, or mental or physical disability, including for students to safely walk or bicycle to school.
- Alternatives to, or delay of the need for, major transportation improvements. A well-connected and efficient transportation system, including for areas that have been added to or are being considered for inclusion in an urban growth boundary.
- Well-planned key industrial sites (including certified sites) and employment centers that contribute to economic revitalization by being ready for development with no unresolved transportation or land use issues.
- Preservation or enhancement of the "through movement" function of a state highway.
- Alternatives to, or delay of the need for, expansion of an urban growth boundary through increased efficiency in the use of land.
- Transportation system or land use pattern that reduces transportation-related emissions that contribute to climate change.

TGM has historically been funded with federal transportation dollars, with additional staff support and funding provided by the State of Oregon. Awarded projects are administered by ODOT's TGM office on behalf of a local jurisdiction according to state and federal requirements.

The TGM Program awards grants on an annual basis. All projects have a two-year period to be completed after being awarded a grant. Award amounts generally range from \$75,000 to \$200,000.

Applications are due annually in June and awards are made in August.

Agencies eligible for TGM grants include cities, counties, some special districts, councils of governments (COGs) working on behalf of member governments, tribal governments, metropolitan planning organizations (MPOs), and metropolitan service districts. Special districts – such as school districts – may be eligible as part of a joint application with a local government for an otherwise eligible project.

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*DLCD TECHNICAL ASSISTANCE GRANTS*

The Oregon Department of Land Conservation and Development offers technical assistance grants to support:

1. Economic development
2. Streamlining planning and zoning processes
3. Natural hazards planning
4. Updating coordinated county-wide population projections
5. Infrastructure/public facility financing plans

Projects outside of these priorities are also encouraged to apply, as project proposals are evaluated and awarded based on the merits of the application. The criteria for Technical Assistance grant applications address the priorities above and other factors to ensure the effective use of state resources.

Technical assistance projects are solicited biennially in September. The next solicitation should be anticipated in Spring 2017. However, it is wise to check with DLCD periodically throughout the biennium, since funds may sometimes become available as other projects are completed under budget or postponed.

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## COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM

Grants and technical assistance are available to develop livable urban communities for persons of low and moderate incomes by:

- expanding economic opportunities; and
- providing housing and suitable living environments.

Non-metropolitan cities and counties in rural Oregon can apply for and receive grants. Oregon tribes, urban cities (Albany, Ashland, Beaverton, Bend, Corvallis, Eugene, Grants Pass, Gresham, Hillsboro, Medford, Portland, Redmond, Salem and Springfield) and counties (Clackamas, Multnomah, Washington) receive funds directly from HUD.

All projects must meet one of three national objectives:

1. The proposed activities must benefit low- and moderate-income individuals.
2. The activities must aid in the prevention or elimination of slums or blight.
3. There must be an urgent need that poses a serious and immediate threat to the health or welfare of the community.

Funding amounts are based on:

- the applicant's need;
- the availability of funds; and
- other restrictions defined in the program's guidelines.

The following are the maximum grants possible for any individual project, by category:

- Microenterprise: \$100,000
- Public Works
  - Water and Wastewater Improvements: \$2,500,000 except preliminary/engineering planning grants maximum \$150,000
- Community/Public Facilities: \$1,500,000
- Community Capacity/Technical Assistance: no specific per-award-limit but limited overall funds
- Regional Housing Rehabilitation: \$400,000
- Emergency Projects \$500,000

Oregon's Infrastructure Finance Authority (IFA) manages the CDBG funding for the state. Applications are accepted quarterly.

## PRIVATE FUNDING SOURCES

Most private sources of funds grant small amounts, and many are available only to private non-profit organizations. Private funding sources listed here may have relevance to specific community benefits offered by public transportation. As many federal funding sources require a local match amount, private funding can be important as a source for required match amounts. By partnering with private non-profit entities, public transportation agencies can access many of these funding sources.

In addition to the private funding sources inventoried below, private funding opportunities may also take the form of:

- Public-Private Partnerships (P-3 or PPP)—transit agencies can partner with private entities on an unlimited number of projects which allow private partner to impose user fees for use of a facility.
- Station area rights and other developer Incentives
- Joint development strategies
- Sponsorships, campaigns, and donations. Money may be raised through fundraising campaigns such as crowd sourcing, or by “selling” sponsorships for amenities such as bus shelters, kiosks and benches.

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**OREGON COMMUNITY FOUNDATION**

[www.oregoncf.org](http://www.oregoncf.org)

The Oregon Community Foundation's Community Grants Program awards about 175 grants per grant cycle, twice per year, mostly to small- and moderate-size nonprofits. The average grant is \$20,000. OCF receives 400-500 proposals per grant cycle.

The program aims to address evolving community needs and build civic leadership and engagement. Preference is given to proposals that:

- Demonstrate a close fit with OCF funding priorities
- Reflect significant community engagement, both in terms of volunteers and financial support (cash and in-kind)
- Address an important community-identified need
- Please review information about [funding priorities](#), [eligibility](#) and [how to apply](#).

OCF's board has identified several strategic priority areas (such as early childhood, jobs, and the economy). The Community Grants program stands alone and may not reflect these strategic interests.

**Eligibility**

Applicants must have 501(c)(3) tax-exempt status and be classified as a public entity, rather than a private foundation, as defined by section 509(a) of the Internal Revenue Code.

Applicants, generally, may submit only one Community Grant application per 12-month period as long as they are unsuccessful in obtaining a grant. Applicants that do successfully receive a grant may not apply for another grant until 18 months after their previous application was submitted. An exception may be made when an applicant from a smaller community serves as the "umbrella" for multiple programs where acquiring separate 501(c)(3) status for each would be impractical. Please contact OCF staff if you believe your organization may be such an exception.

**Activities Typically Not Eligible for Funding**

- Annual fund appeals and contributions to endowments
- Sponsorship of either one-time or annual events or performances, unless they will result in significant growth in ongoing organizational capacity, financial stability or audience diversity
- Projects in individual schools
- Grants to subsidize participation (scholarships) or re-granting programs
- Purchases or activities that occur prior to grant decisions
- Deficit funding
- Replacement of government funding
- Lobbying to influence legislation
- Scientific research

- Religious activities

**Due Date for Application**

Applications are accepted through the [MyOCF online application system](#). Applications are accepted December 1<sup>st</sup> to January 15<sup>th</sup> at midnight, and from June 1<sup>st</sup> to July 15<sup>th</sup> at midnight.

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## *FORD FOUNDATION*

Each year the Ford Foundation makes about 1,400 grants. The grants are highly competitive, as in a typical year, less than one percent of unsolicited grant ideas result in funding. Requests range from a few thousand to millions of dollars. Grant applications are reviewed at our New York City headquarters and in our international offices.

Grants are divided into 7 thematic areas:

- Civic Engagement and Government
- Creativity and Free Expression
- Equitable Development
- Gender, Racial and Ethnic Justice
- Inclusive Economies
- Internet Freedom
- Youth Opportunity and Learning

Any grant which does not fall into one of these seven categories is designated as a Non-Thematic Targets grant.

The foundation has numerous grant interest areas. Those most applicable to transit systems will likely be found under the categories of Inclusive Economies, Civic Engagement and Government, and Equitable Development.

Proposals can be submitted on-line throughout the year at:  
<http://www.fordfoundation.org/work/our-grants/idea-submission/>

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*MEYER MEMORIAL TRUST*

<http://mmt.org/about-meyer/2016-funding-opportunities/>

**Description and Eligible Activities**

Meyer Memorial Trust (MMT) grants are awarded for a wide array of activities in the four portfolio areas of affordable housing, healthy environment, building community, and equitable education. MMT grants help support many kinds of projects, including offering core operating support, strengthening organizations, and building and renovating facilities.

**Amount**

Grants generally range anywhere from \$2,000 to \$400,000.

**Applying**

Grant applications go through a two-step process. The first step in the application process is the initial Inquiry Application. The Meyer Memorial Trust accepts Inquiry Applications through Meyer's [GrantIS application online portal](#). We will conduct an initial screening and invite full proposals from applicants whose Inquiry Applications demonstrate the strongest fit with our overall priorities and the specific goals of our funding opportunities.

Applicants will be contacted within 30-45 days after the Inquiry deadline about the status of their application. Applicants invited to submit a full proposal will be provided with detailed instructions at that time and will have three weeks to submit a full proposal.

Deadlines for the 2016 application for the three categories were:

- Housing Opportunities: 5 p.m., Monday, May 9
- Building Community: 5 p.m., Monday, May 23
- Healthy Environment: 5 p.m., Monday, June 6

We anticipate that funding decisions will be announced no later than the end of 2016, with funding available by early 2017.

**Eligibility**

To be eligible to apply for an MMT grant or funding program, organizations must:

- Share MMT goals and vision for change
- Be committed to equity, diversity and inclusion in their organizations and partnerships
- Have a track record of effective work directly related to our funding priorities or have identified such work as a strategic and mission-aligned priority over the grant period
- Collaborate with other organizations in their community, within the same sector and/or across sectors
- Recognize the intersection between their organization's work and broader policies and systems
- Have effective leadership that engages a base of community support

- Demonstrate the administrative capacity, financial plan and organizational commitment to implement their proposed project
- Be committed to understanding and evaluating the impact and effectiveness of their work

In addition to fulfilling the above requirements, all applicants must:

- Fall into one of these categories: a nonprofit agency recognized as tax-exempt by the Internal Revenue Service; a public educational institution; a government or recognized Tribal agency; or an organization that is requesting funding for a project that has a charitable, tax-exempt purpose.
- Seek funding for work that takes place within the state of Oregon.
- Provide equal opportunity in leadership, staffing in service regardless of age, gender, race, ethnicity, sexual orientation, disability, national origin, political affiliation or religious belief.
- Not require attendance at or participation in religious/faith activities as a condition of service delivery nor require adherence to religious/faith beliefs as a condition of service or employment.

### **Description and Eligible Activities**

A wide range of project types are funded. The trust's mission is to "nurture and enrich the educational, spiritual, cultural, and social lives of individuals, families, and communities."

The trust provides grants for a broad range of activities. These generally include education, science, technology, scientific research and innovation. Organizations involved in advancing culture and the arts are also welcomed each year, as are projects that elevate human services and health care in the region, including community- and faith-based organizations, particularly those that serve youth. The trust rarely funds normal ongoing operations, including existing staff, the continuation of existing projects, or the continuation of programs previously financed from other external sources.

While trail projects have not been specifically funded by this trust in the past, there may be certain aspects of trail system development, special programs, or facilities that could capture the interest of this grant maker. A creative approach is needed.

In most cases, grants are awarded for the benefit of the people living and contributing in the Pacific Northwest (Alaska, Idaho, Montana, Oregon, and Washington).

### **Amount**

Grant award size varies depending upon organization and project, with past practices generally informing future decisions. Historically, individual grants have ranged from \$50,000 to \$250,000. Because the grant application and evaluation process is rigorous, thorough, and time intensive, requests for less than \$50,000 are generally discouraged.

### **Timing**

A Letter of Inquiry may be submitted to the Trust at any time. Letters of Inquiry are reviewed to determine if an organization and proposed project sufficiently fit Trust interests and guidelines to warrant submission of a full proposal. Once the Trust has received a Letter of Inquiry, it will return a response within about three weeks. If your proposal is eligible for consideration by the Trust, an invitation to submit a full application is given. If appropriate, specific advice will be provided.

### **Eligibility**

Only requests from 501(c)(3) non-profit organizations are accepted, and IRS documentation proving tax-exempt status is required. Requests for support are generally limited to projects that occur within five states of the Pacific Northwest: Alaska, Idaho, Montana, Oregon, and Washington. Preference is given to organizations that receive the majority of their funding from private sources.

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**WEYERHAEUSER GIVING FUND**

<http://www.weyerhaeuser.com/sustainability/communities/community-investment/>

**Description and Eligible Activities**

The Weyerhaeuser Giving Fund provides support for community-based nonprofit organizations that work to improve the general welfare and quality of life in the communities that the company serves in several states including Oregon. The Weyerhaeuser Giving Fund concentrates the majority of its funding in four focus areas:

- Affordable Housing and Shelter
- Education and Youth Development
- Environmental Stewardship
- Human Services, Civic and Cultural Growth

The grant program does not fund operating deficits or debt liquidation.

**Amount**

Grant amounts vary in scale in relationship to our presence in the community and the philanthropic budget available for the year. The minimum grant awarded is \$1,000.

**Timing**

The current application deadline is August 31, 2016.

We generally communicate our funding decision after we receive a recommendation to fund your request from your local Advisory Committee (not when you submit your grant application). Many of our committees wait until after the August 31 deadline has passed to prioritize and finalize their grant recommendations, which means you might not hear from us until the fall.

**Eligibility**

To be eligible for funding, a program must be a tax-exempt, nonprofit public charity classified under Section 501(c)(3) of the U.S. Internal Revenue Code OR a public education institution or government entity qualified under Section 170(c)(1) of the U.S. Internal Revenue Code.

Applicants must operate in or offer services in areas where Weyerhaeuser operates.

### **Description and Eligible Activities**

The Robert Wood Johnson Foundation funds a wide array of research and initiatives to help address some of America's most pressing health challenges. We fund program and policy initiatives in the following four areas which are each critical to health equity—enabling everyone in our nation to live a healthier life:

- **Health Systems:** Catalyzing fundamental changes in health and health care systems to achieve measurably better outcomes for all.
- **Healthy Kids, Healthy Weight:** Enabling all children to attain their optimal physical, social and emotional well-being, including growing up at a healthy weight.
- **Healthy Communities:** Creating the conditions that allow communities and their residents to reach their greatest health potential.
- **Health Leadership:** Engaging a diverse array of leaders in all sectors with the vision, experience, and drive to help build a Culture of Health.

We fund a wide range of activities, including but not limited to:

- Planning and demonstration projects
- Research and evaluations
- Policy and statistical analysis
- Learning networks and communities
- Public education and strategic communications
- Community engagement and coalition-building
- Training and fellowship programs
- Technical assistance

### **Amount and Match Requirement**

Amounts awarded and time periods vary widely and depend on the scope of the project. Over the last five years, we have made awards ranging from \$3,000 to \$23 million with time periods ranging from one month to five years. However, most grants are in the \$100,000 to \$300,000 range, and run from one to three years.

### **Timing**

A number of funding opportunities are active at any one time. Their deadlines vary. Please check [here](#) for currently active funding opportunities.

**Eligibility**

Any organization is welcome to respond to a call for proposal (CFP). However, the vast majority of our funding is to nonprofit organizations and public agencies. Historically, less than one percent of our funding has been to for-profit organizations, and always in instances where the institution's project is an excellent fit with our strategies and we felt they were best suited to do the work.

Grantees may include representatives from business, education, public health, health care, community organizations, community members, policy advocates, foundations, and policy-makers.

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*STATE FARM COMPANY GRANTS*

<https://www.statefarm.com/about-us/community/education-programs/grants-scholarships>

**Description and Eligible Activities**

The grants focus on three areas: safety, community development, and education.

- Safety Grants—Auto and Roadway Safety, Teen Driver Education, Home Safety and Fire Prevention, Disaster Preparedness, Disaster Recovery
- Community Development Grants—Affordable Housing, Job Training, First Time Homeownership, Neighborhood Revitalization, Small Business Development, Financial Literacy
- Education—Grants for K-12 public schools in the areas of Teacher Development, Service-Learning, and Education Reform
- It is possible that some public transportation activities may be eligible for the Safety Grants under the Auto and Roadway Safety category.

**Amount**

Grant amount requested must be \$5,000 or more.

**Timing**

The 2017 grant applications will be available beginning Thursday, September 1, 2016 through Monday, October 31, 2016.

**Eligibility**

The applicant must be an educational institution, government entity, 501(c)(3) charitable nonprofit organization, 501(c)(4) volunteer fire company, or a 501(c)(6) chamber of commerce.

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*TOM'S OF MAINE 50 STATES FOR GOOD*

<http://www.tomsofmaine.com/community#50-states-for-good>

**Description and Eligible Activities**

Tom's of Maine 50 States for Good initiative supports grassroots organizations throughout the country working to do good in their communities. Eligible projects must have a positive impact on the community in one of the following areas:

- Environmental Goodness
- Healthy Goodness
- Human Goodness

**Amount**

In 2016, the program is giving over \$1 million to 52 nonprofit funding recipients who are the winners of the 2015 50 States for Good program. Online voters, as well as Tom's of Maine employees, determine the grantees.

**Timing**

The company is not accepting any grant, sponsorship, or product donation requests at this time. The 50 States for Good program is an annual program, so it is anticipated that the program will open for next year's applications soon.

**Eligibility**

To be eligible to apply for a grant, organizations must be:

- Nonprofit 501(c)(3) organizations, in good standing, with funding requests related to community events, projects or program support

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*WALMART FOUNDATION STATE GIVING PROGRAM*

<http://corporate.walmart.com/foundation/apply-for-grants/state-giving-program>

**Description and Eligible Activities**

Funding requests must align with the Foundation's three areas of focus:

- Opportunity - Helping create economic opportunity for individuals and fostering economic growth.
- Sustainability - Enhancing the sustainability of global supply chains in food, apparel and general merchandise.
- Community - Strengthening the resilience and cohesion of local communities and inspiring associates to give back.

There are three additional areas of focus:

- Hunger relief & Healthy Eating — examples include food pantries, backpack programs, nutrition education programming, cooking and food skills training and SNAP outreach.
- Women's economic empowerment—Walmart's Women's Economic Empowerment Initiative began on September 14, 2011 with more than \$100 million dollars in grants to drive progress in five key areas: women-owned businesses, farms and factories, job training and education, and gender diversity
- Career Opportunity — examples include job training programs and placement programs. Special interest is given to programs focused on women and veteran programs.

**Amount**

Grants range from \$25,000 to \$200,000, depending on the type of program. The average grant size is \$40,000. Organizations may receive only one grant per state per calendar year. Grant applications must not include a request to fund personnel expenses of more than 50% for any single program-related position.

**Timing**

The State Giving Program accepted applications from Oregon in 2016 during Application Cycles 1 and 3. During Application Cycle 1, from January 18 to January 29, applications were only accepted for focused giving areas. During Application Cycle 3, from June 27 to July 1, applications were accepted for focused giving and community engagement areas.

**Eligibility**

Only tax-exempt nonprofits under Section 501(c)(3) of the Internal Revenue Code that are listed in the most current IRS 50 State Master File at the time the grant application is submitted are eligible to request funding.

State Advisory Councils, made up of local Walmart associates representing each state, determine the needs within each state, review all eligible grant applications, and make funding recommendations to the Foundation.

*US BANK COMMUNITY POSSIBLE GRANT PROGRAM*

<https://www.usbank.com/community/index.aspx>

**Description and Eligible Activities**

The U.S. Bank Foundation seeks to build strong partnerships and lasting value in communities with a U.S. Bank office by supporting organizations that improve the educational and economic opportunities of low- and moderate-income individuals and families and that enhance the cultural and artistic life of communities.

The Foundation has the following funding priorities:

**Work - Workforce Education & Economic Prosperity:** The grant program supports programs and organizations that help small business thrive, people succeed in the workforce, provide pathways to higher education, and gain greater financial literacy. It funds organizations that provide training for small business development as well as programs that support individuals across all skill and experience levels to ensure our workforce is equipped for success. It supports organizations and programs that help low-income and at-risk high school students prepare for post-secondary education at a community college, university, trade or technical school. The program also supports programs that improve financial literacy among students, adults, seniors, and veterans.

**Home - Neighborhood Stability & Revitalization:** The Foundation's giving supports efforts that connect individuals and families with sustainable housing opportunities. It provides financial support to assist people in developing stability in their lives through access to safe and accessible homes, as well as supporting programs that assist low- and moderate-income homebuyers and existing home owners.

**Play - Vibrant Communities:** The Foundation invests in community programming that supports ways for children and adults in low-and moderate-income communities to play and create. Grants support programs that provide underserved communities access to cultural activities, visual and performing arts, zoos and aquariums. The arts in education grants provide funding for arts-focused nonprofit organizations that bring visual and performing arts programming to low-and moderate-income K-12 schools and youth centers.

Within these general guidelines, the Foundation considers the following requests:

- General operating support
- Program support
- Capital support (only organizations with which the company has a pre-existing relationship are eligible)
- In-kind contributions of equipment and property

**Timing**

2016 Application Deadlines for the State of Oregon:

- April 1 for Play Grants

- July 1 for Home Grants
- September 1 for Work Grants

**Eligibility**

Organizations must have tax-exempt status under IRS section 501(c)(3) and certify that they maintain a non-discrimination policy that ensures the organization does not discriminate based on race, ethnicity, color, sex, religion, age, national origin, ancestry, citizenship, sexual orientation, gender identity and/or expression, or disability.

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**BULLITT FOUNDATION**

<http://www.bullitt.org/>

**Description and Eligible Activities**

The mission of the Bullitt Foundation is to safeguard the natural environment by promoting responsible human activities and sustainable communities in the Pacific Northwest. The Foundation supports nonprofit organizations in the Emerald Corridor – the region bounded by Vancouver, BC to the north, Portland to the south, and the Cascades to the east.

The Foundation's current focus is on the following areas:

*Regional Ecosystem Health program:* The objective is to advance innovations in regional planning and management of land and water to improve cross-sector coordination and ensure that policy and financial decisions fully account for the value we receive from nature. The program supports efforts, based on sound science, to restore and protect nature as the basic infrastructure supporting urban resilience and sustainability.

Program priorities include:

- Applied Urban Research and Tool Development
- Conservation Finance and Environmental Economics
- Ecosystem Defense and Ecological Restoration

*Energy, Climate & Materials program:* The objective is to eliminate the externalized costs that dirty energy and toxic chemicals impose on the natural environment and human health. By reducing the use of fossil fuels the program will reduce emissions that cause climate change. By transitioning from toxic materials to inherently safe ones, it will encourage economic growth through technological advancements in materials & chemistry based on sound ecological values.

Program priorities include:

- Energy and Climate
- Green Chemistry, Toxics, and Sustainable Materials

*Deep Green Buildings program:* The objective is to promote the construction of commercial and residential buildings that implement designs, materials, and technologies that are most relevant to 21st century needs and conditions, including the impending changes to our region's climate.

Program priorities include:

- Building Design and Components
- Finance and Regulation

*Resilient Cities, Healthy Communities program:* The objective is to promote cities and neighborhoods where human-powered transportation is commonplace; public transit is fast and reliable; urban green

space is abundant and accessible to all; housing is green and affordable; infrastructure is resilient and resource efficient; healthy food is available; and the sense of community is strong.

Program priorities include:

- Sustainable Infrastructure
- Density Done Right
- Food Systems

*Thought Leadership and Innovation Program:* The objective is to identify structural or systemic barriers to meaningful progress, and to set in motion actions and initiatives intended to surmount them.

This program is currently being developed and should be implemented by Spring 2017.

### **Amount**

Grant Range: \$5,000 - \$200,000

Average Grant: \$25,000 - \$50,000

### **Timing**

Applicants must begin the application process by completing an online proposal inquiry form available on the [Foundation's website](#).

Application Deadlines:

Proposal inquiry forms: March 15 and September 15, annually

Grant applications for invited proposals: May 1 and November 1, annually

### **Eligibility**

To be eligible, US organizations must have a current nonprofit tax status under the Internal Revenue Act. Applicants must have a 501(c)(3) determination letter, or identify themselves as a validly organized and operating municipal corporation, public agency, or Native American tribe.

The Foundation will consider special requests in response to unforeseen situations or time-sensitive needs. However, funds for such grants are very limited, and approval standards are high. Current grantees are not precluded from submitting a special request. Interested applicants should contact the appropriate program officer to determine eligibility. The Foundation does not fund capital projects or university overhead costs, nor does it fund candidates for political office or lobbying activities.

### **Description and Eligible Activities**

The Charles Stewart Mott Foundation affirms its founder's vision of a world in which each of us is in partnership with the rest of the human race, where each individual's quality of life is connected to the well-being of the community, both locally and globally.

The Foundation offers the following grant programs:

*Education:* The mission of this program is to expand learning opportunities and supports for children, particularly those from low- and moderate-income communities. The program is divided into the following areas:

- Improving community access to quality education
- Promote high school graduation and college readiness
- Youth engagement
- Special initiatives to address social and economic and political contexts

*Civil Society:* The mission of this program is to support efforts to assist in democratic institution building, strengthen communities, promote equitable access to resources, and ensure respect of rights and diversity. Grantmaking in the United States focuses on strengthening the effectiveness of the nonprofit sector and addressing race relations.

*Environment:* The mission of this program is to support the efforts of an engaged citizenry working to create accountable and responsive institutions, sound public policies, and appropriate models of development that protect the diversity and integrity of selected ecosystems in North America and around the world. Grantmaking focuses on the following areas:

- Addressing the challenge of securing clean water
- Transforming development finance
- Advancing climate change solutions through the promotion of clean energy
- Special initiatives to advance environmental protection

Because available funding is limited, [Letters of Inquiry](#) are strongly preferred for unsolicited ideas or projects. Such letters should describe the purpose and objectives of the project, general methodology and total cost of the project.

Both general-purpose and project-specific requests are considered. In addition, both single- and multi-year proposals are acceptable.

**Amounts**

Total Annual Giving: \$114,000,000.

Median grant size is in the \$100,000 range. The majority of grants are between \$15,000 and \$250,000 annually.

**Eligibility**

Nonprofit organizations with regional or national scope.

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**CRUISE INDUSTRY CHARITABLE FOUNDATION**

<http://www.cruisefoundation.org>

**Description and Eligible Activities**

The Cruise Industry Charitable Foundation focuses its efforts on programs designed to strengthen and improve the quality of life in communities served by the cruise industry.

The Foundation's areas of emphasis include the following:

*Civic and Community Development:* The Foundation is interested in programs designed to enhance community economic development through job creation and training, and provide assistance to local community improvement projects. In addition, the Foundation supports programs that improve access to basic community services, including disaster relief or emergency service assistance, as well as programs that promote civic education, self-sufficiency, and individual awareness programs at both the youth and adult levels.

*Educational Assistance and Training Programs:* The Foundation encourages the creation and expansion of learning experiences and opportunities the primary, secondary, and higher education levels, particularly for minority and disadvantaged students. Areas of special interest include educational and training programs designed to improve literacy, teach basic life skills, promote good citizenship and public service, and increase reading, math, and science proficiencies.

*Public Health Programs:* The Foundation assists public health facilities that provide patient treatment or support services for patients and their families. It also supports medical research projects aimed at disease prevention.

*Environmental Preservation Programs:* The Foundation encourages and supports programs designed to promote environmental awareness and public education, as well as the development of enhanced environmental technologies for the maritime sector.

Grants must be used for direct program cost or funding for specific programs or activities. Priority is given to programs that meet the needs of economically disadvantaged populations.

**Amounts**

Total Annual Giving: \$944,000

Grant Range: \$2,500 - \$15,000

**Timing**

No deadlines. CICF grant applications are accepted throughout the calendar year. Grant submissions are reviewed on a quarterly basis for final selection.

**Eligibility**

Potential grantees must be public charities within the meaning of Internal Revenue Code Section 501(c)(3).

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**GEORGIA-PACIFIC FOUNDATION**

<http://www.gp.com/Company/Community/Foundation>

**Description and Eligible Activities**

The Georgia-Pacific Foundation supports a wide range of nonprofit organizations that improve the quality of life in communities where Georgia-Pacific operates and where company employees live and work. A map of the Georgia-Pacific facilities and locations is available online at <http://www.gp.com/Company/Company-Overview/Locations>.

The Foundation has identified the following key investment areas:

*Education:* The focus is on the following areas:

- Job training
- Literacy
- College Scholarships
- Teacher Development
- K-12 public Schools

*Community Enrichment:* The focus is on the following areas:

- Affordable housing
- Arts and culture
- Community and public safety
- Employee volunteerism
- Youth enrichment programs

*Environment:* The focus is on the following areas:

- Clean air, clean water, and recycling
- Environmental education
- Land conservation
- Resource conservation

*Entrepreneurship:* The focus is on the following areas:

- Youth entrepreneur education
- Market-based management courses at colleges, universities, and nonprofit organizations
- Women and minority entrepreneur programs

Types of support include:

- Project support
- Sponsorships
- In-kind donations

### **Amounts**

Total Annual Giving: \$3,600,000

Typical Grant Range: \$1,000 - \$50,000

There is no definite grant amount. When deciding what or if we will contribute, we consider the value of the program to our communities and the amount we have available to donate.

### **Timing**

Grant requests are reviewed on a rolling cycle throughout the year. Funds become more limited as the fiscal year progresses.

### **Eligibility**

GP funds nonprofit organizations, government agencies, and educational institutions. GP uses established criteria to evaluate the many proposals they receive. The first step in determining if their program is eligible is to take the [Eligibility Quiz](#).

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*PEOPLE FOR BIKES COMMUNITY GRANT PROGRAM*

<http://www.peopleforbikes.org/pages/community-grants>

**Description and Eligible Activities**

The PeopleForBikes Community Grant Program is aimed at providing funding to those who strive to improve bicycling in America through efforts such as the building of trails and paths, or through promoting general bicycling advocacy and awareness. Fundable projects include paved bike paths, lanes, and rail-trails as well as mountain bike trails, bike parks, BMX facilities, and large-scale bicycle advocacy initiatives. A key goal of the PeopleForBikes grants program is to support bicycling in as many places as possible.

**Amount and Match Requirement**

PeopleForBikes will accept requests for funding of up to \$10,000 for facility and advocacy projects. It does not require a specific percentage match, but prefers leverage and funding partnerships. The program does not consider grant requests in which its funding would amount to 50 percent or more of the project budget.

**Timing**

PeopleForBikes generally holds 1-2 open grant cycles every year. Interested applicants should submit an online letter of interest (LOI) through the PFB website. PFB will request a full project application from a short list of qualified applicants. Invited organizations will receive access to the online application. For 2016, Letters of Interest for the Spring cycle are due on January 29<sup>th</sup>, while LOIs for the Fall cycle are due July 29<sup>th</sup>.

**Eligibility**

PeopleForBikes accepts grant applications from non-profit organizations with a focus on bicycling, active transportation, or community development, from city or county agencies or departments, and from state or federal agencies working locally.

Requests must support a specific project or program; we do not grant funds for general operating costs. PeopleForBikes will fund engineering and design work, construction costs including materials, labor, and equipment rental, and reasonable volunteer support costs. For advocacy projects, we will fund staffing that is directly related to accomplishing the goals of the initiative.

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## GOOGLE AD GRANTS — FREE ADVERTISING

<http://www.google.com/grants/>

### **Description**

Google Grants provides \$10,000 per month in in-kind AdWords™ advertising (Google’s online advertising tool), to nonprofit organizations to promote their missions and initiatives on Google.com. Grantees build and manage their own AdWords accounts just like paying advertisers, but participate with the following limits:

- A daily budget of \$329, which is equivalent to about \$10,000 per month
- A maximum cost-per-click (CPC) limit of \$2.00 USD
- Only run keyword-targeted campaigns
- Only include text ads that appear on Google search result pages, in positions below the ads of paying advertisers.

### **Timing**

Google will run the ads for as long as the organization remains actively engaged with their Grants AdWords account.

### **Eligibility**

Only registered 501(c)(3) nonprofit organizations are eligible. Applicants must register using the “Google for Nonprofits” [application form](#).

## TECHNICAL ASSISTANCE AND TRAINING RESOURCES

Technical assistance grants can help public transit providers to build their internal knowledge and capacity. Grants are typically small, and usually in the form of time donated by technical experts rather than cash. The following programs may be of interest.

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*AMERICAN PLANNING ASSOCIATION'S COMMUNITY PLANNING ASSISTANCE TEAM PROGRAM—  
PLANNING ASSISTANCE*

<https://www.planning.org/communityassistance/teams/>

**Description**

This program is designed to bring planning resources and opportunities to communities with a demonstrated need for assistance and to strengthen the ability of local residents and other community stakeholders to influence or determine decisions that affect their quality of life.

APA's Community Planning Assistance Team (CPAT) program is accepting applications from communities seeking pro bono planning assistance. If you live in or know of a community that lacks planning resources and could benefit from a team of planning experts, you're encouraged to apply by submitting a proposal form available [here](#).

**Timing**

Proposals from or inquiries about projects from communities are accepted anytime.

**Eligibility**

Communities facing a range of challenges including, but not limited to, social equity and affordability, economic development, sustainability, consensus building, and urban design are well-suited for assistance through the program.

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*MJ MURDOCK CHARITABLE TRUST: FUNDRAISING & CAPACITY BUILDING - ESSENTIALS OF DEVELOPMENT SEMINAR*

<http://www.murdock-trust.org/enrichment-programs/essentials-development-seminar.php>

**Description**

The Essentials of Development Seminar helps organizations create a diversified funding development structure. Designed for smaller or start-up organizations, the program's goal is to help these groups build a sustainable development structure. A five-member faculty of Pacific Northwest leaders presents valuable materials and strategies to about ten organizations in a pair of two-day sessions.

Among the topics covered in the seminar are:

- Principles of Fundraising
- Development of a case for support
- Donor list segmentation and management
- Donor contact and care
- Multiple approaches to fundraising

**Participants**

Each year, a group of about ten organizations is invited to participate in this program, which includes seminars held for two days each in December and May. Each organization brings its executive director, development personnel, and at least two board members. Registration costs \$100 per participant. The Trust provides all meals, hotel accommodations in a private room, and all seminar materials.

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*BENEVON—FUNDRAISING FROM INDIVIDUALS*

<http://www.benevon.com/welcome>

**Description**

Benevon trains and coaches nonprofit organizations to implement a mission-based system for engaging and developing relationships with individual donors. Benevon programs and services provide the step-by-step process and the tools—training, templates, scripts, and rigorous coaching—to put non-profit organizations on the pathway to financial sustainability.

Benevon offers free 10-minute and 55-minute video training sessions on its website. It also offers free seminars and conference calls.

Additionally, it offers the Benevon Model framework, a mission-centered, four-step, circular process for raising sustainable funding from individual donors.

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*COMMUNITY TRANSPORTATION ASSOCIATION OF AMERICA*

[www.ctaa.org](http://www.ctaa.org)

The Community Transportation Association of America (CTAA) provides technical assistance for a wide variety of alternative transportation issues and activities.

**Description**

Notably, it offers transportation facility financing through its [Community Development Transportation Lending Services](#) program, a special loan fund to develop bus or rail sites, multi-modal facilities, park & ride lots and maintenance or garage facilities to improve community mobility and enhance economic development. The fund is dedicated to improving mobility opportunities and enhancing economic development through community transportation.

**Eligibility**

Private companies, nonprofit organizations, and state or local governments supporting community transportation and intermodal activities are eligible applicants.

## ADDITIONAL RESOURCES

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*THE CHRONICLE OF PHILANTHROPY*

<https://www.philanthropy.com/>

<https://www.philanthropy.com/article/2006-Fund-Raising-Service/172483>

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*ASSOCIATION OF FUNDRAISING PROFESSIONALS*

[www.afpnet.org](http://www.afpnet.org)

**ATTACHMENT C – CORVALLIS TRANSIT OPERATIONS FEE**

# City of Corvallis



## Frequently asked questions on the...

### Transit Operations Fee

#### *What is the fee?*

The fee is a monthly charge to City of Corvallis utility customers to generate revenue to support Corvallis Transit System (CTS) operations. The money raised from this fee is dedicated to CTS and cannot be used for any other purpose. This revenue replaces property tax funds that supported transit operations. A portion of the fee also replaced transit fares, allowing riders after February 1, 2011, to get on any CTS or Night Owl bus without paying a fare.



#### *Who pays the fee?*

Corvallis utility customers—residences, businesses, and industry—on the monthly City Services bill.

#### *How much is the fee?*

As of February 1, 2016, the amount for single-family residential customers is **\$2.75** per month, the amount for multi-family residential customers is **\$1.90** per housing unit per month, and the amount for commercial and industrial customers is based on the type of business, and as a result, is different for each one.

#### *How is it determined?*

The new fee is calculated each January, using a trip generation methodology. A nationally-recognized model, developed by the Institute of Traffic Engineers, provides an estimate for how much different categories of properties use a transportation system (“trip generation”). A “trip” is the one-way travel from a starting point to a destination. For example, going to work in the morning is one trip; coming home at night is one trip. The model estimates the average number of vehicle trips generated by a property based on the type of property it is. In the model, a single-family residence generates an average of 9.6 trips a day. Businesses, which have a greater impact on the transportation system from customers coming to the site, have a higher number of average trips than a single-family home. The number of average trips for non-residential properties is based on a number of factors; for example, the average for trips for schools is based on the number of students attending.

#### *Will the fee go up in the future?*

The City Council approved an annual review of the fee, which could result in an increase or decrease. The review will compare the Transit Operations Fee charge for a single-family residential customer with the state of Oregon’s average price for a gallon of gasoline from January of the previous year to December of the previous year. If the average gas price is higher, the fee will go up on February 1<sup>st</sup> of the current year; if the average gas price is lower, the fee will go down, but it will never fall below the base rate of \$2.75 per month for single-family residential customers.

#### *Why is the fee on my water bill?*

By putting the charges for multiple City services on one bill, the City is able to reduce the administrative costs of processing and printing invoices over what it would cost to have each charge on a separate bill.

***How much revenue will the fee generate?***

The fee generated over \$1,200,000 in Fiscal Year 2013-14 and slightly less than \$1,200,000 in Fiscal Year 2014-15. About \$400,000 annually replaces the property tax revenue that had supported CTS in the past; the fee makes the property tax revenue available for other property tax services, such as police, fire, library, parks and/or recreation.

***Can I ride the Corvallis bus for free?***

Yes, as of February 1, 2011, all CTS and Night Owl riders can get on the bus without paying a fare.

***Do I have to be a Corvallis resident to ride for free?***

No, anyone can get on a CTS or Night Owl bus without paying a fare.

***How long is the free transit service going to last?***

There is no end date at this time.

***If I don't have to pay to ride, who is paying to provide the service?***

Funding for CTS comes from a number of sources: Federal grants, the transit operations fee, and a direct contribution from Oregon State University.

***Do I have to pay to ride the Philomath Connection, Linn-Benton Loop, and the 99 Express?***

Yes, you have to pay to ride these other transit systems. (However, OSU currently has agreements with the Philomath Connection and Linn-Benton Loop that allow students, faculty, and staff to ride these two bus systems by simply showing their OSU ID.)

***Since I have to pay to ride these other buses, but not CTS, how will transfers between the systems work?***

Transfers from the other bus systems to CTS will be free. If you transfer from CTS to one of these other systems, you will be required to pay the appropriate fare when you board that bus.

***If I get on CTS, can I transfer to the Philomath Connection for free?***

No, you have to pay a fare to ride the Philomath Connection. Discounted passes and coupon books for the Philomath Connection are available at the Philomath City Hall and the Corvallis Utility Billing office.

***If I get on the Philomath Connection, can I transfer to CTS for free?***

Yes, all rides on CTS and the Night Owl are fareless.

***Where can I buy a bus pass for the Philomath Connection or the Linn-Benton Loop?***

Passes for these bus systems can be purchased at the Corvallis Utility Billing office, located at 500 SW Madison Avenue, the Philomath City Hall (for the Philomath Connection only) and the Albany City Hall (for the Linn-Benton Loop only).

***Where can I find more information?***

Call the Corvallis Public Works Department at 541-766-6916

Send an email to [cts@corvallisoregon.gov](mailto:cts@corvallisoregon.gov)