



**City of Tigard**  
**City Center Development Agency Board**  
**and Tigard City Council - Agenda**

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**TIGARD CITY CENTER DEVELOPMENT AGENCY BOARD AND CITY COUNCIL**

**MEETING DATE AND TIME:**

February 2, 2016 - 6:30 p.m.

**MEETING LOCATION:**

City of Tigard - Town Hall  
13125 SW Hall Blvd., Tigard, OR 97223

**PUBLIC NOTICE:**

Times noted are estimated.

Assistive Listening Devices are available for persons with impaired hearing and should be scheduled for City Center Development Agency Board meetings by noon on the Monday prior to the City Center Development Agency Board meeting. Please call 503-718-2419 (voice) or 503-684-2772 (TDD - Telecommunications Devices for the Deaf).

Upon request, the City will also endeavor to arrange for the following services:

- Qualified sign language interpreters for persons with speech or hearing impairments; and
- Qualified bilingual interpreters.

Since these services must be scheduled with outside service providers, it is important to allow as much lead time as possible. Please notify the City of your need by 5:00 p.m. on the Thursday preceding the meeting by calling: 503-639-4171, ext. 2410 (voice) or 503-684-2772 (TDD - Telecommunications Devices for the Deaf).

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SEE ATTACHED AGENDA

**VIEW LIVE VIDEO STREAMING ONLINE:**

<http://live.tigard-or.gov>

This meeting will be cablecast on Tualatin Valley Community TV as follows:  
Replay Schedule - Channel 28

- Every Sunday at 11 a.m.
- Every Monday at 6 a.m.
- Every Thursday at 6 p.m.
- Every Friday at 10:00 p.m.



City of Tigard  
City Center Development Agency Board - Agenda

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**TIGARD CITY CENTER DEVELOPMENT AGENCY BOARD AND CITY COUNCIL**

**MEETING DATE AND TIME:** February 2, 2016 - 6:30 p.m.

**MEETING LOCATION:** City of Tigard - Town Hall - 13125 SW Hall Blvd., Tigard, OR 97223

6:30 PM

1. CITY CENTER DEVELOPMENT AGENCY BOARD MEETING AND CITY COUNCIL
  - A. Call to Order- City Center Development Agency and City Council
  - B. Roll Call
  - C. Pledge of Allegiance
  - D. Call to Board and Staff for Non-Agenda Items

**CITY COUNCIL**

2. EXECUTIVE SESSION: The Tigard City Council will go into Executive Session to discuss exempt public records under ORS 192.660(2)(f). All discussions are confidential and those present may disclose nothing from the Session. Representatives of the news media are allowed to attend Executive Sessions, as provided by ORS 192.660(4), but must not disclose any information discussed. No Executive Session may be held for the purpose of taking any final action or making any final decision. - **6:35 p.m. estimated time**

**CITY CENTER DEVELOPMENT AGENCY**

3. JOINT MEETING WITH THE CITY CENTER ADVISORY COMMISSION - **6:50 p.m. estimated time**
4. UPDATE ON THE MAIN STREET/FANNO CREEK SITE (SAXONY) REDEVELOPMENT STUDY - **7:35 p.m. estimated time**

**CITY COUNCIL**

5. CONTINUATION OF PUBLIC HEARING: CONSIDER COMPREHENSIVE PLAN AMENDMENTS AND ZONING CHANGES TO PRESERVE MEDIUM DENSITY (R-12) RESIDENTIAL LAND – **7:55 p.m. estimated time**

Note: Council may decide to conduct the hearing as a quasi-judicial proceeding, including addressing the following additional standards: Tigard Development Code: 12.380.030.B.

  1. Demonstration of compliance with all applicable comprehensive plan policies and map designations;
  2. Demonstration of compliance with all applicable standards of any provision of this code or other applicable

implementing ordinance; and

3. Evidence of change in the neighborhood or community or a mistake or inconsistency in the comprehensive plan or zoning map as it relates to the property which is the subject of the development application.

6. CONTINUED DELIBERATION: APPROVING AN ORDINANCE ESTABLISHING TMC 3.75 PARKS MAINTENANCE FEE AND APPROVING A RESOLUTION AMENDING THE MASTER FEES AND CHARGES SCHEDULE - **8:25 p.m. estimated time**
7. DISCUSSION ON THE PROPOSED FY 2017 CITY COUNCIL BUDGET - **9:25 p.m. estimated time**
8. NON AGENDA ITEMS
9. ADJOURNMENT - **9:40 p.m. estimated time**

**AIS-2503**

**3.**

**CCDA Agenda**

**Meeting Date:** 02/02/2016

**Length (in minutes):** 45 Minutes

**Agenda Title:** Joint Meeting with the City Center Advisory Commission

**Submitted By:** Sean Farrelly, Community  
Development

**Item Type:** Joint Meeting-Board or Other Juris. **Meeting Type:** City Center  
Development  
Agency

**Public Hearing:** No

**Publication Date:**

**Information**

**ISSUE**

Joint Meeting with City Center Advisory Commission

**STAFF RECOMMENDATION / ACTION REQUEST**

Review and discuss with the City Center Advisory Commission their 2015 Annual Report and draft 2016 Goals.

**KEY FACTS AND INFORMATION SUMMARY**

The City Center Advisory Commission (CCAC) makes recommendations to the Board of the City Center Development Agency (CCDA) on urban renewal policy, budget and implementation measures to improve Tigard's Downtown area.

Two documents will inform the joint meeting discussion. The first is the CCAC's 2015 Annual Report, describing the key activities of the commission (required by CCAC by-laws); it was previously provided in the December 3, 2015 Council Newsletter. Among the projects that the CCAC advised on that had significant milestones in 2015 were the Ash/Burnham development, Saxony property purchase, strolling street project, and gateway art.

The second document is the CCAC's draft goals for 2016. The CCAC developed these draft goals (see attached) at their January 13th meeting. The CCAC will review these draft goals with the CCDA Board before finalizing them at their February meeting. Their four draft goals are:

1. Support URA project infrastructure and development
2. Identify and discuss long-term impacts of future development projects in the downtown area
3. Communications and engagement

4. Gather more information to educate ourselves about topics of interest to downtown, such as marketing opportunities to developers, and affordable housing.

## **OTHER ALTERNATIVES**

N/A

## **COUNCIL GOALS, POLICIES, APPROVED MASTER PLANS**

**Tigard City Council 2015-17 Goals and Milestones:** Goal #2. Make Downtown Tigard a Place Where People Want to Be

**Tigard Comprehensive Plan Special Planning Areas- Downtown:** Goal 15.2 Facilitate the development of an urban village.

**Tigard Strategic Plan Goal 3:** Engage the community through dynamic communication.

## **DATES OF PREVIOUS COUNCIL CONSIDERATION**

October 6, 2015 Joint meeting with CCAC

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### **Attachments**

[2015 CCAC Annual Report](#)

[CCAC Draft 2016 Goals](#)

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# 2015 Annual Report of the City Center Advisory Commission to the Board of the City Center Development Agency

December 1, 2015

The City Center Advisory Commission (CCAC) adopted annual goals and objectives for calendar year 2015. The annual agenda for the CCAC was largely devoted to developing and implementing the goals. This report is organized around the adopted 2015 CCAC Goals and Objectives.

## **Goal 1. Support implementation of current City Center Urban Renewal projects and programs**

### **Projects:**

- **Ash/Burnham redevelopment**
- **Public space (Tigard St. Trail, Fanno Creek Park improvements, etc.)**
- **Gateway art**

### **Attract additional development:**

- **Development incentives**

### Outcomes:

Staff provided the CCAC with regular updates on the progress of the Ash/Burnham redevelopment project to add 165 housing units downtown. At the April 8<sup>th</sup> meeting the commission found that the proposed development agreement met the criteria for public/private partnerships developed by the CCAC in 2014. They recommended approval of the development agreement and urban renewal plan amendments to the CCDA. A letter expressing the endorsement was provided to the CCDA Board prior to Board approval of the Ash/Burnham Disposition and Development Agreement (DDA). CCAC commissioners also attended the public open house for this project.

CCAC members actively participated in the public Tigard Street Heritage Trail concept design sessions. Additionally, the CCAC reviewed the Tigard Street Heritage Trail concept at regular business meetings, making suggestions that were incorporated into the presentation to Council.

After the city closed on the Saxony properties in July, members of the CCAC participated in the interview panel to select the team led by Resolve Architecture to study site suitability for public space and mixed-use development. A member of the CCAC provided input on the Saxony project goals at the kick-off meeting for the study.

The CCAC endorsed the installation of the Gateway art and implementation of the finalized Gateway plans at the March 3, 2015 CCDA meeting. Construction of the stone walls, landscaping, artwork installation and lighting were completed in the fourth quarter of the year.

In 2014 the CCAC investigated the effectiveness of development incentives and developed an incentive matrix. The Ash/Burnham DDA incorporated incentives from the matrix, including property tax abatement (VHDZ zone) and a SDC subsidy. A downtown Transit Oriented Development rate is proposed for the new city-wide transportation SDC. Recommendations to adopt development incentives were also incorporated into the commission's review of the Urban Renewal Plan (see Goal 3).

**Goal 2. Support planning for Medium/Long Term projects**  
**Main St / Green St Phase 2**

Outcomes:

Phase 2 of the Main Street Green Street is in the Capital Improvement Plan (CIP) for FY 17-18. The Commission continues to support the inclusion of the Main Street Green on the CIP and has recommended that staff identify additional funding for this project. The estimated cost is \$2.4 million. A Metro grant will fund half, the source of other half needs to be identified.

The CCAC incorporated direction received from the CCDA at the joint meeting in February 2015 regarding improving the view from Highway 99 into this goal. Ideas generated to encourage improvements through voluntary measures and visual examples of potential improvements were presented to CCDA at the joint meeting in October.

**Goal 3. Urban Renewal Plan review**

**Review City Center Urban Renewal Plan and prioritize future projects.**

Outcomes:

The CCAC reviewed the City Center Urban Renewal Plan (URP) and URP projects over the course of multiple meetings. The Commission examined the progress of the plan and considered the implementation of projects already completed. CCAC members participated in a prioritization exercise for projects “not yet completed”, and developed policy and project recommendations for council consideration. This review was formally presented in the report “Ten Years On” to the CCDA at the joint meeting in October.

**Goal 4. Communications**

**Continue to liaise with other city boards and committees, as well as other groups (i.e. Tigard Downtown Alliance, SW Corridor Plan, etc.), on issues related to Downtown**

**Consider a communications plan to proactively engage with the community on Downtown issues**

Outcomes:

The CCAC continued to maintain and improve its communications with other boards and commissions. One or more commissioners routinely attended meetings and/or monitored the agendas of the Park and Recreation Advisory Board (PRAB), Tigard Transportation Advisory Committee (TTAC) and the TTAC Bicycle and Pedestrian Subcommittee. The CCAC had two joint meetings with the Board of the CCDA in 2015. The chair of the CCAC regularly attended CCDA Board meetings, including executive sessions, and Council/CCDA’s liaison regularly attends CCAC meetings.

The CCAC hosted members of the SW Corridor outreach team at the May 13<sup>th</sup> business meeting and offered comments regarding potential transit corridor alignments.

The city’s Communications Strategist attended the CCAC business meeting in September. Target audiences were identified and initial communication messages were proposed. Tasks to continue to formalize communications are likely to continue in 2016.

The City Center Advisory Commission looks forward to further progress in the year to come.  
On behalf of the City Center Advisory Commission,



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Carine Arendes  
Chair



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Linli Pao  
Vice-Chair

## DRAFT CCAC 2016 Goals

GOALS	IMPLEMENTATION
<p>1. Support URA Project Infrastructure &amp; Development</p> <ul style="list-style-type: none"> <li>a. Monitor, review, and provide input on the following key projects</li> <li>b. Monitor progress of prioritized Urban Renewal Plan Projects</li> </ul>	<ul style="list-style-type: none"> <li>a. Key Projects               <ul style="list-style-type: none"> <li>i. Ash/Burnham Redevelopment</li> <li>ii. Public space (Tigard Street Trail, Fanno Creek Park Improvements)</li> <li>iii. Fanno &amp; Main project tracking</li> <li>iv. New Metro CET grant (Main Street Lofts) – scope of work</li> <li>v. Parking management</li> </ul> </li> <li>b.               <ul style="list-style-type: none"> <li>i. fill-in gaps of Hall Blvd sidewalks</li> <li>ii. plaza(s) development</li> <li>iii. the Tigard Street Trail &amp; Tigard Street on-street bicycle lane</li> <li>iv. public restrooms</li> </ul> </li> </ul>
<p>2. Identify and Discuss Long-term impacts of future development projects to the downtown area</p> <ul style="list-style-type: none"> <li>a. Housing availability</li> <li>b. Transportation</li> <li>c. Improvement Programs</li> </ul>	<ul style="list-style-type: none"> <li>a. Affordable Housing – discussing preservation of such housing.</li> <li>b. High Capacity Transit Corridor (SW Corridor Plan)</li> <li>c. Skyline Improvement Program (SIP)</li> <li>d. Main Street Green Street Phase II</li> </ul>
<p>3. Communications &amp; Engagement</p> <ul style="list-style-type: none"> <li>a. Liaisons           <ul style="list-style-type: none"> <li>i. Define the role of liaison and scope of representation</li> <li>ii. Identify and assign CCAC members to liaise with other boards and committees</li> </ul> </li> <li>b. Engagement           <ul style="list-style-type: none"> <li>i. Support expansion and/or formalization of partnership with Tigard Downtown Alliance</li> <li>ii. Develop communications plan for CCAC member engagement with public for upcoming projects</li> <li>iii. Communication appropriate for all Tigard communities</li> </ul> </li> <li>c. Communication with Council/CCDA Board</li> </ul>	<ul style="list-style-type: none"> <li>a. Liaisons           <ul style="list-style-type: none"> <li>i. Only attend meetings where Agenda lists implications for downtown; appoint main liaison and a second.</li> <li>ii. ID for TTAC, SW Corridor Plan Meetings, TDA, Budget, PRAB</li> </ul> </li> <li>b. Engagement           <ul style="list-style-type: none"> <li>i. Advocate for potential funding options to keep TDA momentum going;</li> <li>ii. For example, how do we talk about HCT?</li> <li>iii. Advocating for bilingual outreach as a policy</li> </ul> </li> <li>c. Refine communication with Council/CCDA Board, update Council/CCDA Board on prior goal issues and outcomes, and request Council give more details when charging CCAC to examine issues.</li> </ul>
<p>4. Gather more information to educate ourselves about topics of interest to downtown, such as marketing opportunities to developers, and affordable housing.</p>	<p>Identify staff resources and other information sources related to particular topics</p>

**AIS-2536**

**4.**

**CCDA Agenda**

**Meeting Date:** 02/02/2016

**Length (in minutes):** 20 Minutes

**Agenda Title:** Update on Main Street/Fanno Creek (Saxony) Site Redevelopment Study

**Submitted By:** Sean Farrelly, Community Development

**Item Type:** Update, Discussion, Direct Staff      **Meeting Type:** City Center Development Agency

**Public Hearing:** No

**Publication Date:**

**Information**

**ISSUE**

Update on Main Street/Fanno Creek (Saxony) site redevelopment study

**STAFF RECOMMENDATION / ACTION REQUEST**

The Board of the CCDA is requested to share their opinions and ideas on the design plans.

**KEY FACTS AND INFORMATION SUMMARY**

The CCDA has engaged Resolve Architecture and Planning to prepare the Main Street/Fanno Creek (Saxony) site for redevelopment. Their scope of work includes site and building design, economic feasibility, taking the design through land use approval, and public involvement. The project is nearing completion of the first phase- determining what type of development can be built on the site, and entering the second phase- the land use approval process.

Resolve has produced a design that will initiate the land use review process. A pre-application conference was held on January 28. Comments received at this conference will be used to refine the design that will be taken through the land use process. Once approved, the entitled project (and site) would then be made available for sale. Staff are starting to market the project to area developers.

The design calls for a mixed use building, with a commercial ground floor and creative office space on the upper floors, with approximately 50,000 square feet of space. The design shows a six story building. Currently new building height in the Main Street sub-area is permitted to be 45 feet. If the proposed building is over that height, a Development Code amendment will be requested, requiring the approval of the Planning Commission and Council. The building will be prominent, particularly from the Pacific Highway side.

The ground floor is proposed to be approximately 8,950 gross square feet. One potential ground floor use concept is for a “food business incubator” with shared kitchen space and micro-restaurant space facing Main Street. This would allow food entrepreneurs a low cost way to start and grow their businesses, while activating Main Street and the adjacent public space. This public private partnership idea will be fleshed out by the city's Economic Development Manager with a team of local food entrepreneurs.

The public space design shows a 1,740 square foot area. The proposal would preserve one of the building piers so that it would be built to the same level of the Main Street sidewalk without being structurally dependent on the bridge. Discussions with Clean Water Services indicate the design is likely approvable under their regulations.

Due to site constraints, a major challenge for the project is parking. The current design has only 10 on-site spaces. This is one factor that makes residential development a challenge, as an apartment development without dedicated parking spaces might be difficult to finance in the Tigard market. Off-site space leasing is being investigated which could serve the employees of the office uses, with the on-site surface parking lot reserved for customers of the ground floor businesses.

A geotechnical firm will be engaged to perform testing a report with findings on the site. This report will be available in the next few weeks.

The project is predicated on obtaining an EPA Cleanup Grant from the EPA. The application was submitted in December and the EPA will notify successful grant applicants in May 2016.

Because the property was purchased with Park Bond funds, there is a fixed timeline to determine the best use of the site. Within 20 months of closing (by January 2017), the city must designate which portion of the property will be public space, selling the remaining portion for private redevelopment. Sale proceeds will reimburse the Parks Bond.

## **OTHER ALTERNATIVES**

No alternatives for consideration at this time.

## **COUNCIL GOALS, POLICIES, APPROVED MASTER PLANS**

### Tigard City Council 2015-17 Goals and Milestones

Goal #2. Make Downtown Tigard a Place Where People Want to Be

### City Center Urban Renewal Plan

Goal 1: Revitalization of the Downtown should recognize the value of natural resources as amenities and as contributing to the special sense of place.

Goal 5: Promote high quality development of retail, office and residential uses that support and are supported by public streetscape, transportation, recreation and open space investments.

Tigard Comprehensive Plan

Special Planning Areas- Downtown

Goal 15.2 Facilitate the development of an urban village.

Tigard Strategic Plan

Goal 2: Ensure development advances the vision

**DATES OF PREVIOUS COUNCIL CONSIDERATION**

December 1, 2015: Future of Saxony Site - Update

August 18, 2015: Discussion on Saxony Property Redevelopment Study

May 26, 2015, Authorize Purchase of Saxony Pacific Site

May 5, 2015, Discussion of Prospective Purchaser Agreement

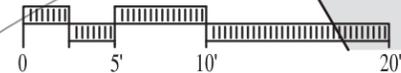
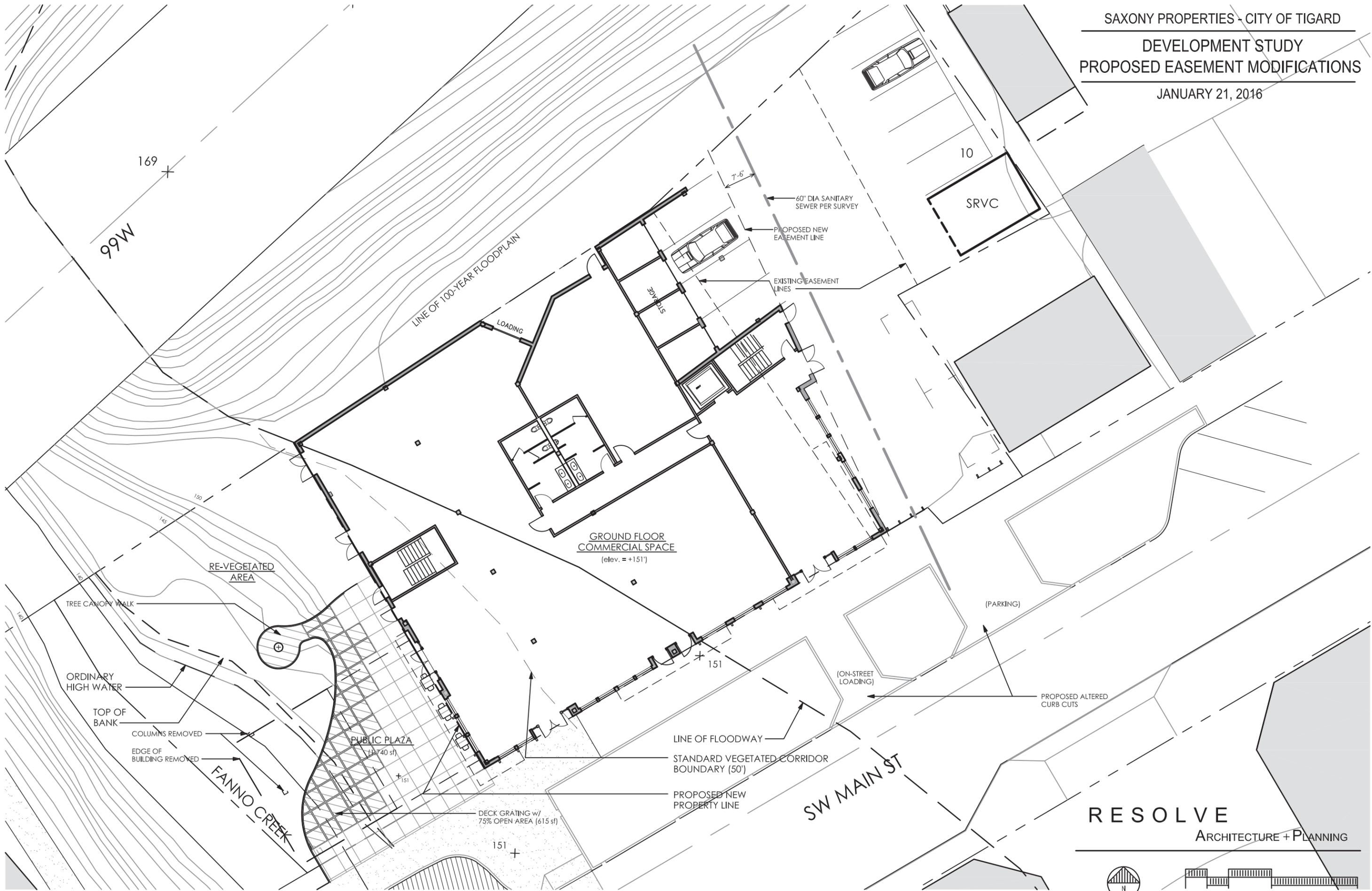
April 8, 2014, Authorize CCDA Executive Director to negotiate voluntary property acquisitions

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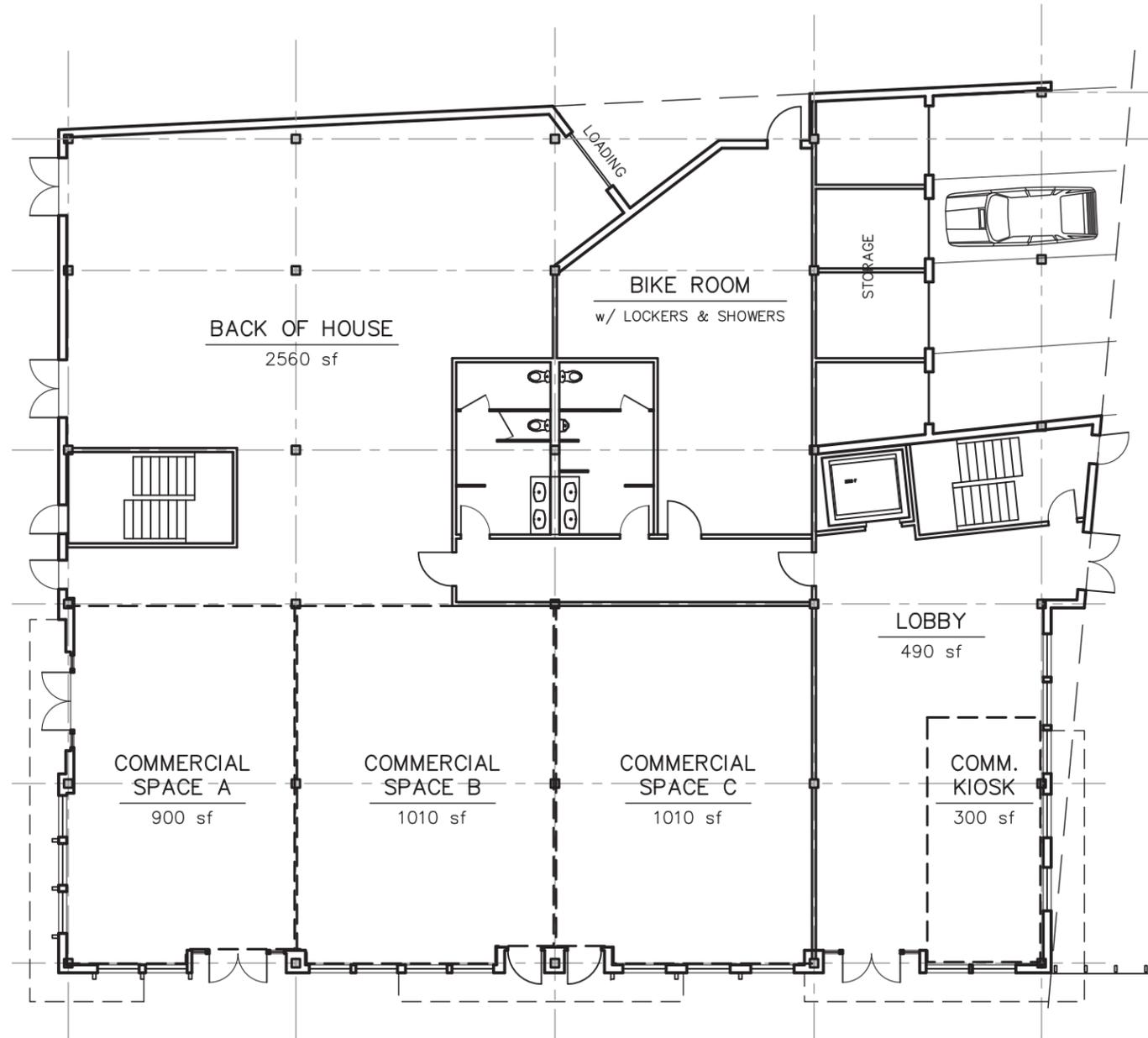
**Attachments**

Main Street Development Progress

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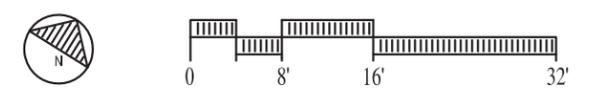
PROGRESS



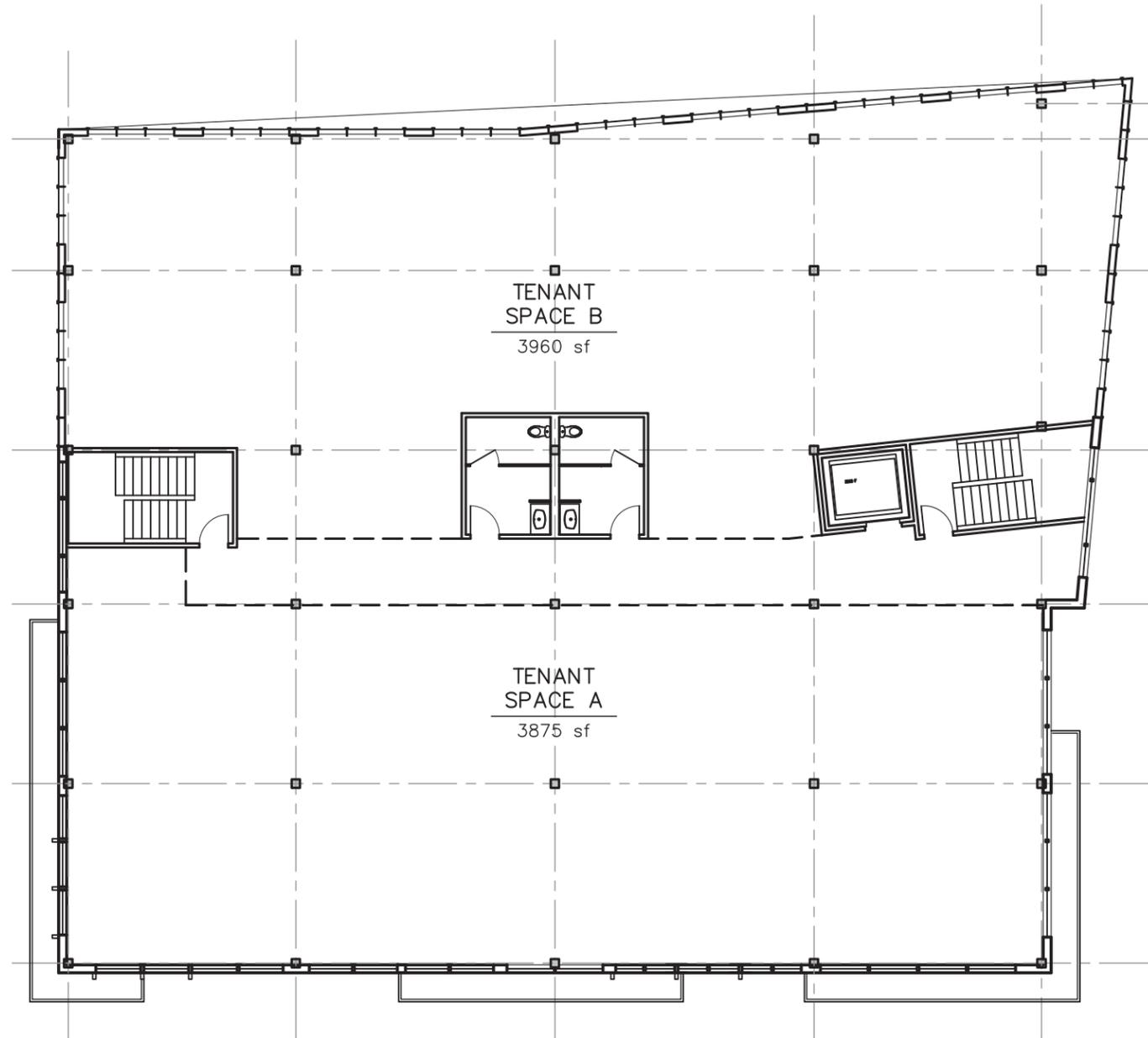
1 PLAN - GROUND FLOOR

8,950 GSF  
FIN. FL. = 151.0'

RESOLVE  
ARCHITECTURE + PLANNING



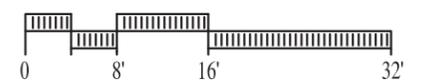
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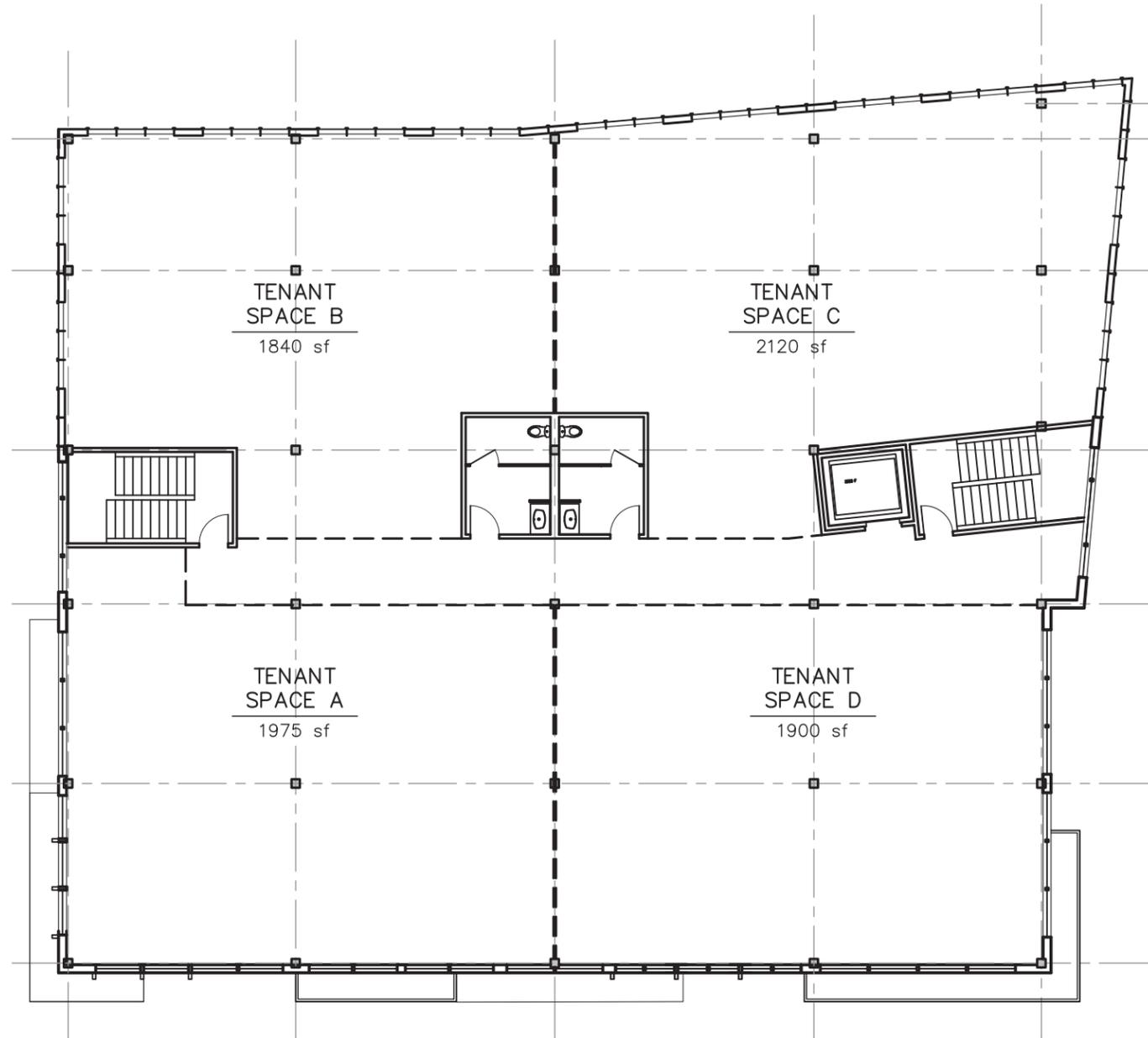
1 PLAN - SECOND FLOOR

9,520 GSF  
FIN. FL. = 166.0'

RESOLVE  
ARCHITECTURE + PLANNING



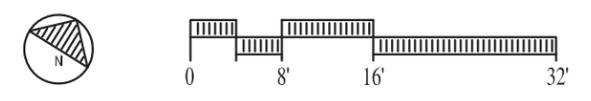
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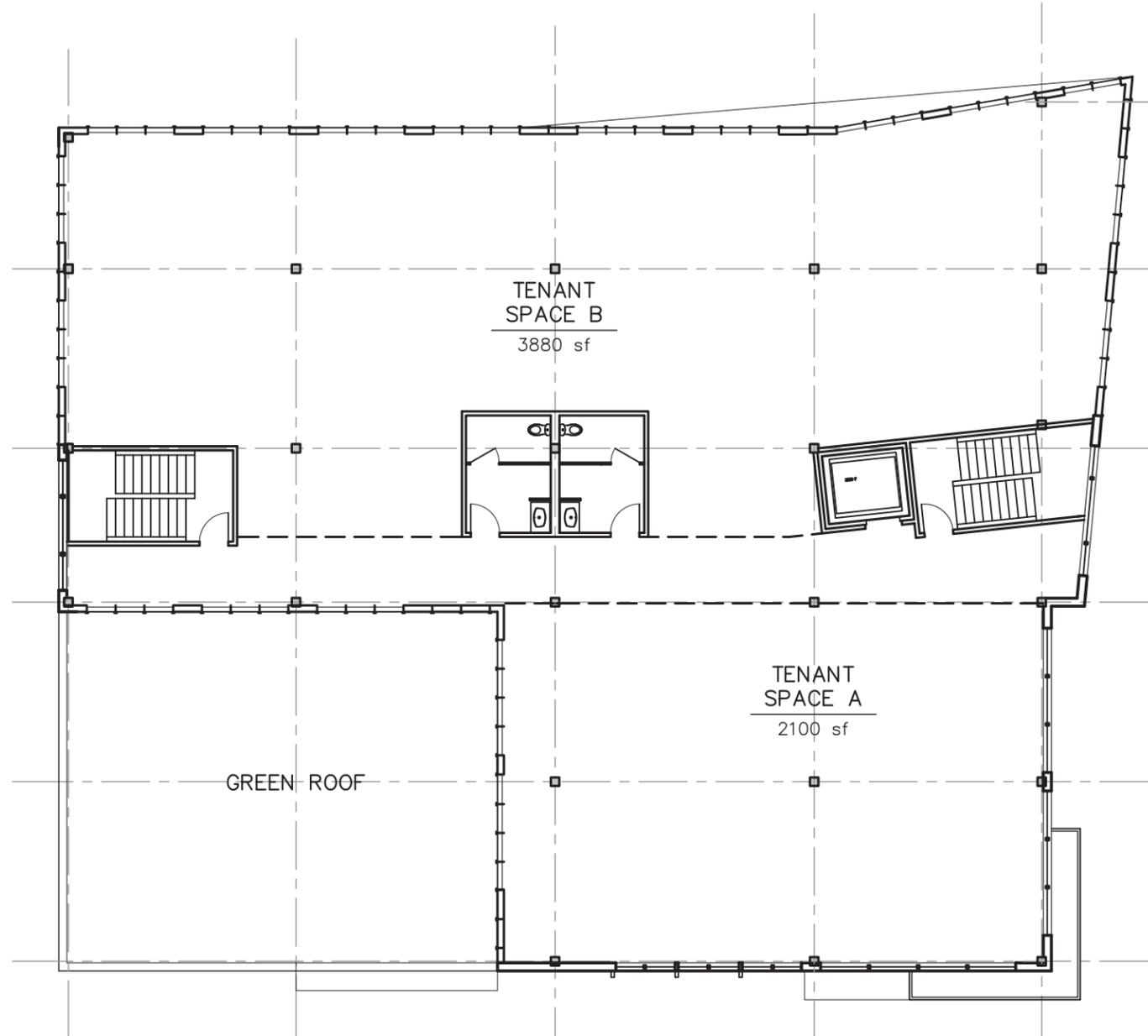
1 PLAN - THIRD FLOOR

9,520 GSF  
FIN. FL. = 178.5'

RESOLVE  
ARCHITECTURE + PLANNING



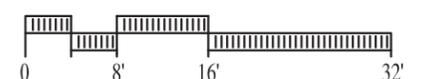
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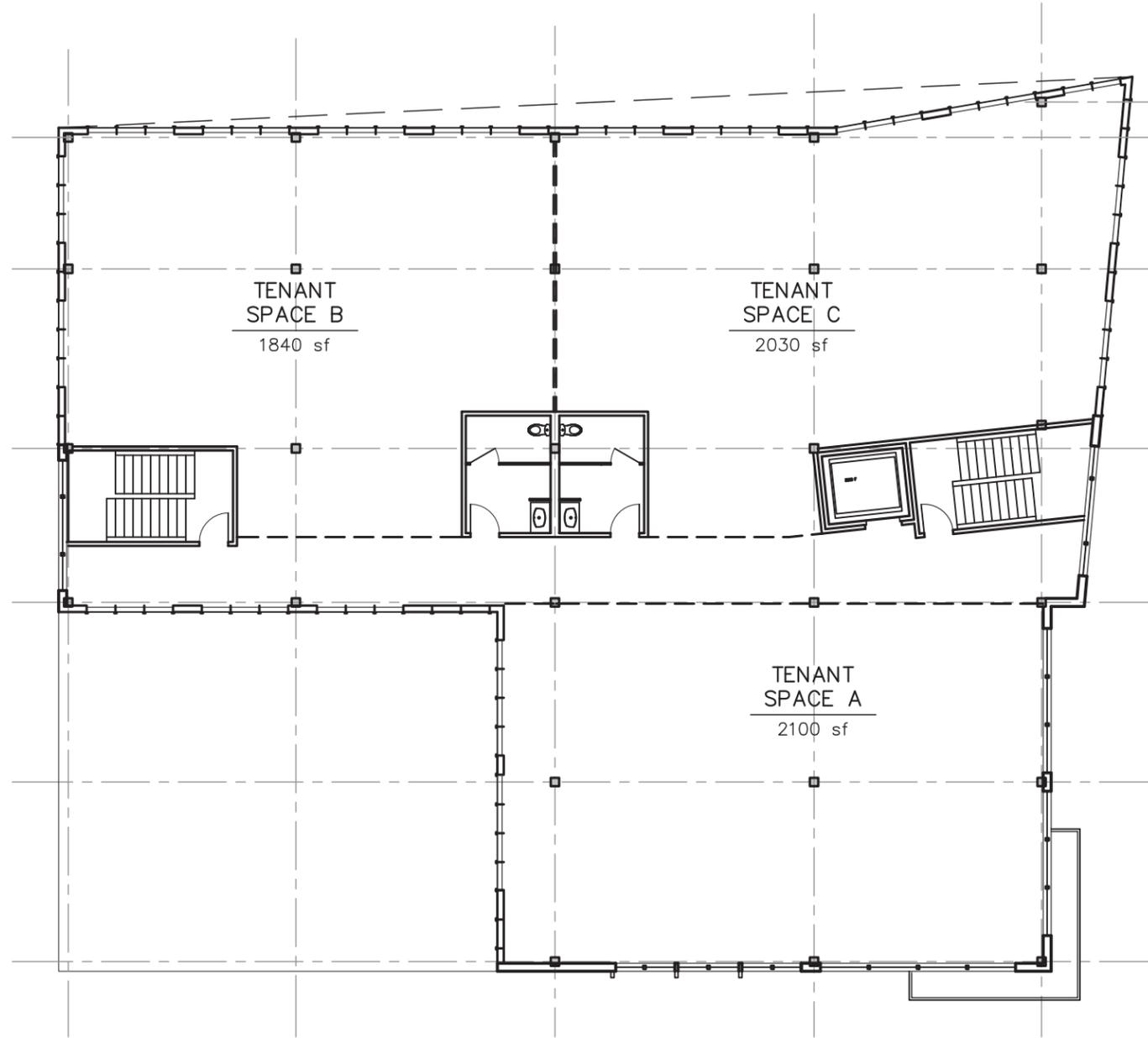
1 PLAN - FOURTH FLOOR

7,725 GSF  
FIN. FL. = 191.0'

RESOLVE  
ARCHITECTURE + PLANNING



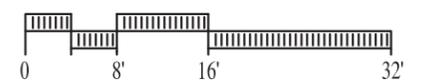
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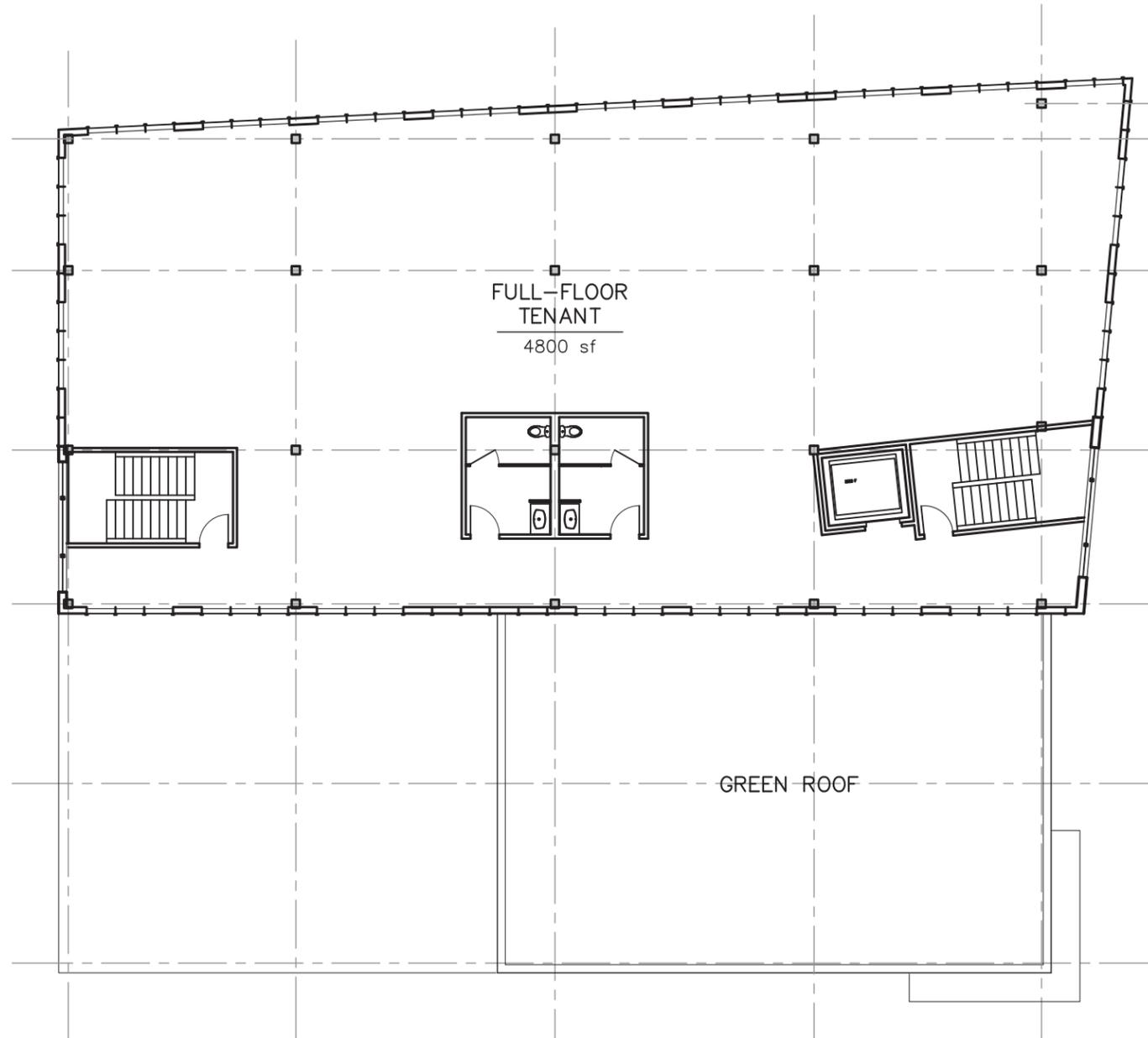
1 PLAN - FIFTH FLOOR

7,725 GSF  
FIN. FL. = 203.5'

RESOLVE  
ARCHITECTURE + PLANNING



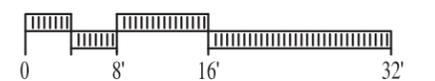
PROGRESS



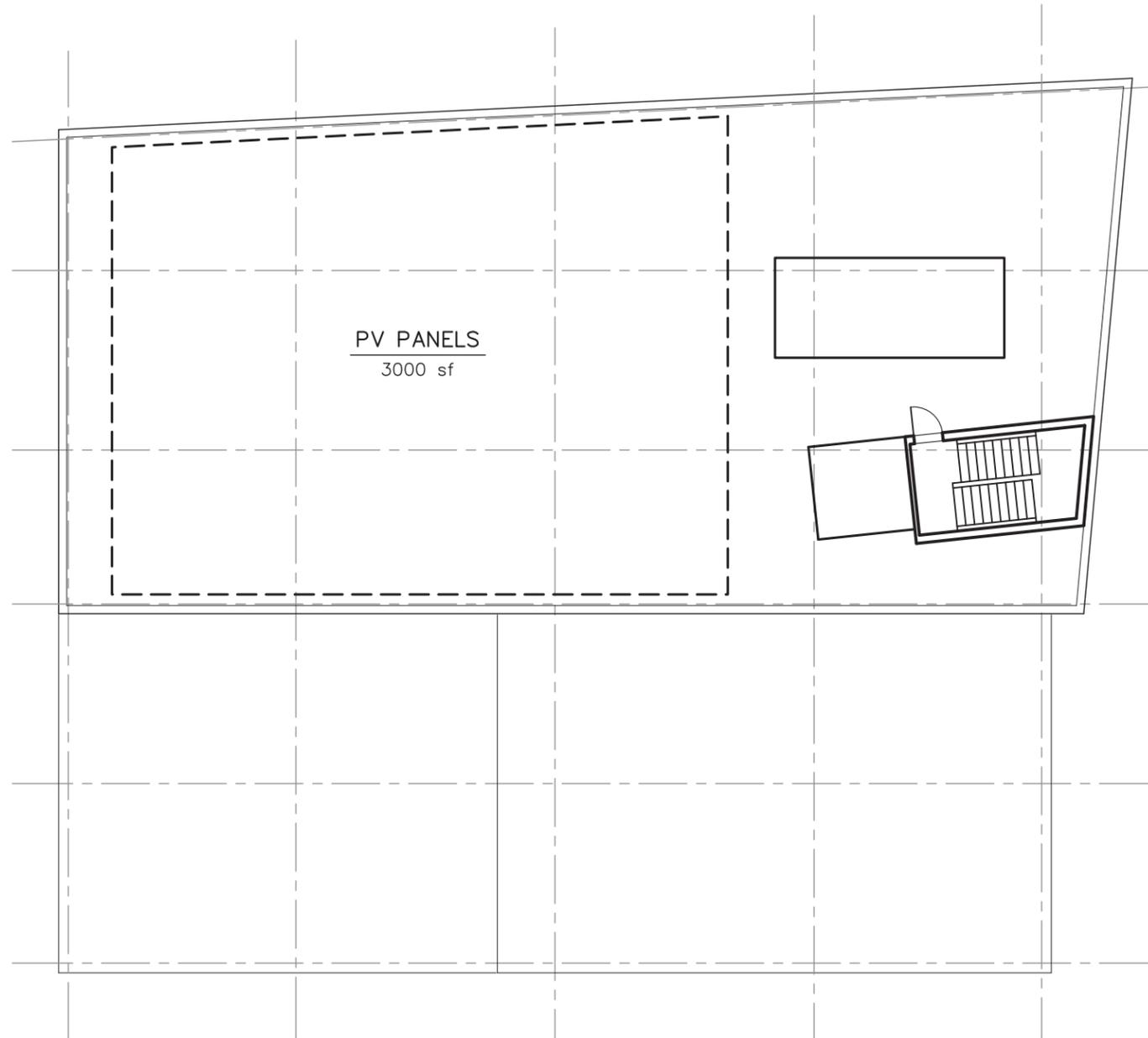
1 PLAN - SIXTH FLOOR

5,790 GSF  
FIN. FL. = 216.0'

RESOLVE  
ARCHITECTURE + PLANNING



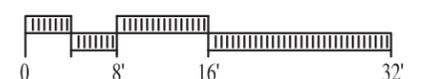
PROGRESS



1 PLAN - ROOF

FIN. FL. = 228.5'

RESOLVE  
ARCHITECTURE + PLANNING





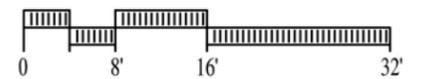
# SAXONY PROPERTY VISUAL CONTEXT

PROGRESS



1 SOUTH ELEVATION

RESOLVE  
ARCHITECTURE + PLANNING

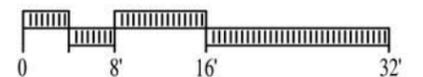


PROGRESS

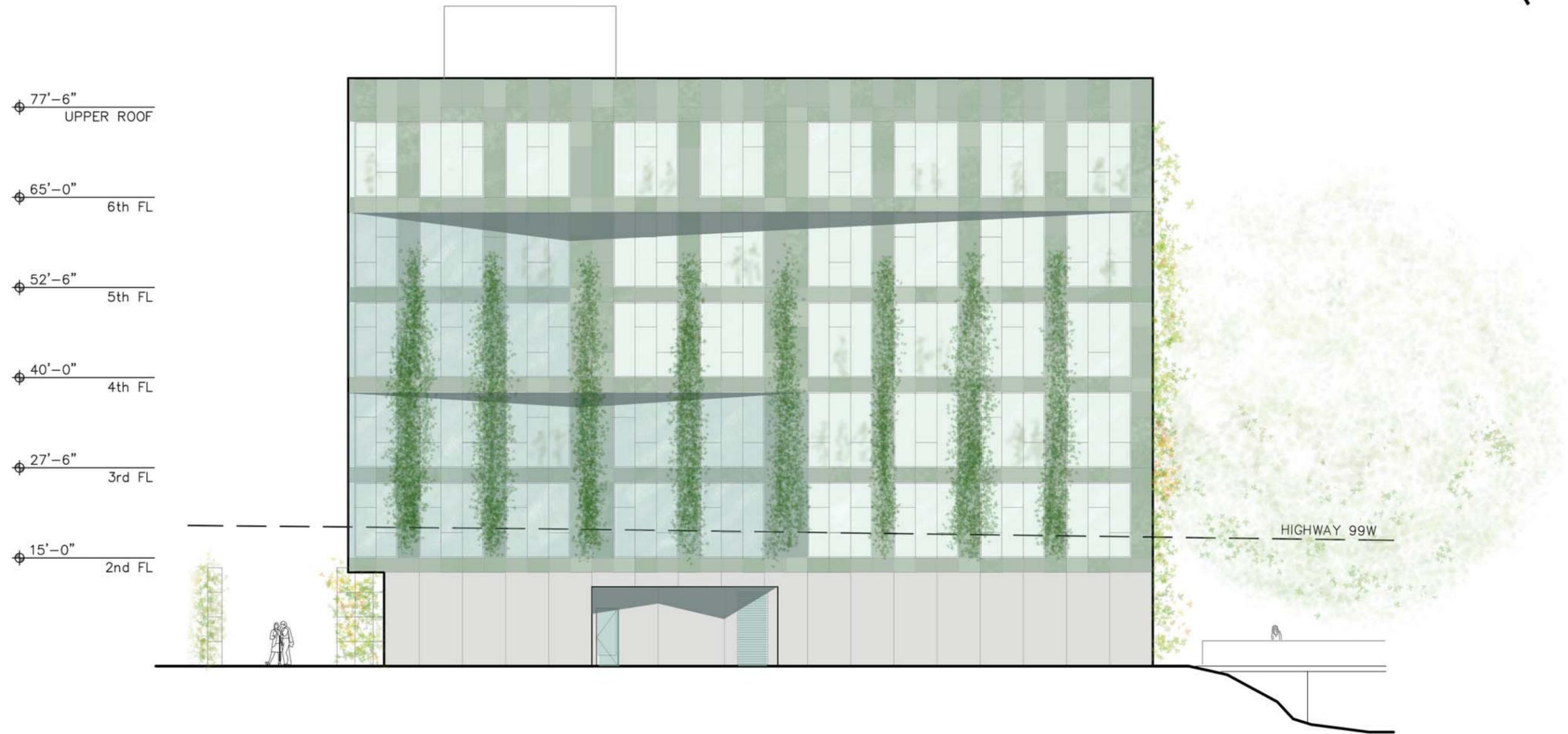


1 WEST ELEVATION

RESOLVE  
ARCHITECTURE + PLANNING

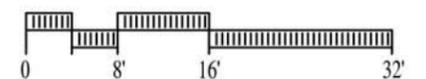


PROGRESS



1 NORTH ELEVATION

RESOLVE  
ARCHITECTURE + PLANNING

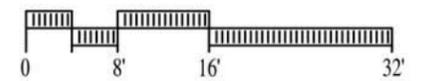


PROGRESS



1 EAST ELEVATION

RESOLVE  
ARCHITECTURE + PLANNING



**AIS-2538**

**5.**

**CCDA Agenda**

**Meeting Date:** 02/02/2016

**Length (in minutes):** 30 Minutes

**Agenda Title:** Medium Density Residential (R-12) Preservation

**Prepared For:** Gary Pagenstecher, Community Development

**Submitted By:** Carol Krager, Central Services

**Item Type:** Ordinance  
Public Hearing - Legislative

**Meeting Type:** Council  
Business  
Meeting -  
Main

**Public Hearing:** Yes

**Publication Date:**

**Information**

**ISSUE**

Shall Council adopt an ordinance to amend the Comprehensive Plan Designations and Zoning Districts Map to facilitate preservation of R-12 zoned land and ensure it is applied in a location that supports residential use?

**STAFF RECOMMENDATION / ACTION REQUEST**

Staff, and the Planning Commission, by a vote of 6 to 1 in favor, recommend that City Council approve the proposed amendments.

**KEY FACTS AND INFORMATION SUMMARY**

The city has initiated this legislative Comprehensive Plan and Zoning Map Amendment to facilitate preservation of R-12 zoned land and ensure it is applied in a location that supports residential use in support of the City’s Housing Goal. The Planning Commission voted 6-1 in favor of the proposal. In response to public testimony at its January 12th hearing, Council continued the hearing and directed staff to respond to public testimony to clarify issues related to land use process and to neighborhood livability at Site A. Staff responses are in the attached Memo to Council.

The City is initiating the Comprehensive Plan and Zoning Map Amendments to facilitate preservation of R-12 zoned land and ensure it is applied in a location that supports residential use. Staff proposes the change in response to separate development applications for two sites involving R-12 zoning. Two pre-application conferences were held in March and August of 2015 for proposals to rezone from C-P to R-12 (or R-25) several contiguous parcels located on SW Spruce and 72nd Avenue (**Site A**). The owners and interested parties are supportive of the City’s legislative proposal to accomplish this.

In April 2015 the City received an application for a Comp Plan and Zone Change (CPA2015-00003/ZON2015-00004) for a parcel owned by the Tigard-Tualatin school district zoned R-12 with frontage on Pacific Hwy (**Site B**). The applicant proposed to change the plan and zoning designation of the site to General Commercial (C-G). In addition to this comprehensive plan and zoning map amendment request, the Applicant requested concurrent Site Development Review approval from the City to allow a 15,085 square foot specialty retail store with associated parking, circulation, landscaping and site improvements. These applications have been withdrawn in favor of the City's legislative action to rezone the subject parcel, as proposed.

Pursuant to the City's housing goal to provide opportunities for a variety of housing types to meet the diverse housing needs of current and future City residents, preservation of R-12 zoned lands is warranted because it allows a full range of housing types at a minimum lot size of 3,050 square feet. The zone provides flexibility for both attached and detached ownership and multifamily rental type housing which supports affordable housing options in the city. Attached single-family residential or detached single-family residential on small lots are an important component of the city's strategy to provide for a range of housing types and for providing a more affordable housing type. This is not low-income housing but a level of affordability for first time home buyers, singles, retirees, and other groups that are having a difficult time finding affordable single-family residential options in Tigard's neighborhoods.

The timing of the applications identified above is such that the City staff would have likely recommended denial of the proposed R-12 to C-G zone change to avoid loss of R-12 zoned land. However, the City's proposal combines the two zone change proposals so that a finding of no net loss of R-12 can be made through the legislative process

The locational characteristics of the subject parcels otherwise support the comp plan amendments and zone changes. The property zoned C-P (**Site A**) fronts on a local and a neighborhood street and is adjacent to property zoned R-4.5 and low-density unincorporated Washington County. The adjacent lower class streets and low density residential use zone makes the property more suitable for medium residential use that forms a transition from the C-G zone to the south and the R-12 zone to the north. Residential-zoned land adjacent to Pacific Hwy is rare in Tigard and is primarily associated with private and public school ownership and use, which is allowed conditionally in residential zones. The Tigard-Tualatin School District has identified the subject property (**Site B**) as surplus and intends to sell it for the highest best use. The proposed C-G zone is the dominant zone along Pacific Hwy (classified as Primary Arterial) and the existing zone of the adjacent parcels. This action would result in a net increase of 0.17 acres zoned R-12.

## **OTHER ALTERNATIVES**

## **COUNCIL GOALS, POLICIES, APPROVED MASTER PLANS**

NA

## **DATES OF PREVIOUS COUNCIL CONSIDERATION**

January 12, 2016

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### **Attachments**

Ordinance

Exhibit A

Exhibit B

Exhibit C

PC Minutes

Memo to Council

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CITY OF TIGARD, OREGON  
TIGARD CITY COUNCIL  
ORDINANCE NO. 16-\_\_\_

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AN ORDINANCE ADOPTING COMPREHENSIVE PLAN AMENDMENT CPA 2015-00005 AND ZONE CHANGE ZON 2015-00007 TO AMEND THE TIGARD COMPREHENSIVE PLAN DESIGNATIONS AND ZONING DISTRICTS MAP AT TWO SITES.

WHEREAS, Section 18.380.020 of the City of Tigard Community Development Code requires legislative amendments to be undertaken by means of a Type IV procedure, as governed by Section 18.390.060; and

WHEREAS, the city has proposed an amendment to the Tigard Comprehensive Plan Map to facilitate preservation of R-12 zoned land and ensure it is applied in a location that supports residential use; and

WHEREAS, on December 14, 2015, the Tigard Planning Commission held a public hearing, which was noticed in accordance with city standards, and recommended approval of the proposed CPA 2015-00005/ ZON 2015-00007 by motion with a 6-1 vote in favor; and

WHEREAS, on January 12, 2016, the Tigard City Council held a public hearing, which was noticed in accordance with city standards, to consider the Commission's recommendation on CPA 2015-00005/ZON2015-00007, hear public testimony, and apply applicable decision-making criteria; and

WHEREAS, on January 12, 2016, the Tigard City Council approved CPA 2015-00005/ZON 2015-00007 pursuant to the public hearing and its deliberations; and

WHEREAS, Council's decision to approve CPA 2015-00005/ZON 2015-00007 and adopt this ordinance was based on the findings and conclusions found in Exhibit "C" and the associated land use record which is incorporated herein by reference and is contained in land use file CPA 2015-00005/ZON 2015-00007.

NOW, THEREFORE, THE CITY OF TIGARD ORDAINS AS FOLLOWS:

SECTION 1: Tigard City Council amends the Tigard Comprehensive Plan Map to change the Comprehensive Plan Designations and Zoning Districts as shown in Exhibit "A" and Exhibit "B."

SECTION 2 Tigard City Council adopts the findings and conclusions contained in Exhibit "C" in support of the Council's action and to be the legislative basis for this ordinance.

SECTION 3: The City Council finds that the immediate applicability of the new zones to the subject properties provided in this Ordinance is necessary to protect the public welfare by preserving affordable housing options contained in the City's Comprehensive Plan while at the same time facilitating development.

SECTION 4: For the reasons set forth in Section 3, an emergency is declared to exist and this Ordinance takes effect upon adoption by the City Council and signature of the Mayor.

By \_\_\_\_\_ vote of all Council members present after being read by number and title only, this \_\_\_\_\_ day of \_\_\_\_\_, 2016.

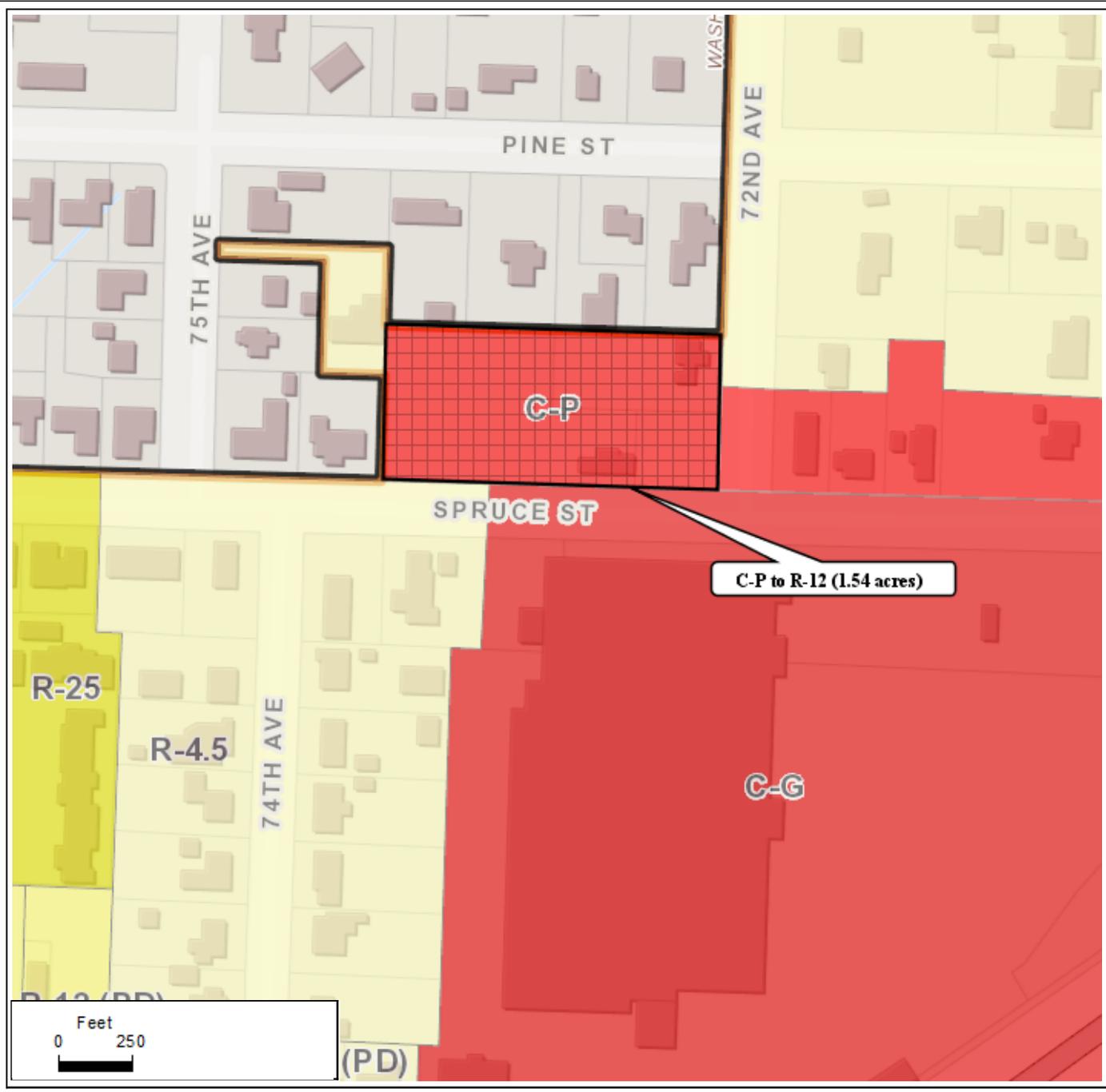
\_\_\_\_\_  
Carol A. Krager, City Recorder

APPROVED: By Tigard City Council this \_\_\_\_\_ day of \_\_\_\_\_, 2016.

\_\_\_\_\_  
John L. Cook, Mayor

Approved as to form:

\_\_\_\_\_  
City Attorney



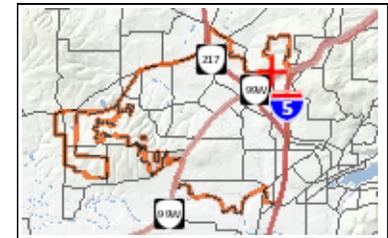
## VICINITY MAP

CPA 2015-00005  
ZON 2015-00007

Medium Residential (R-12)  
Preservation

SITE A

Subject Site



Information on this map is for general location only and should be verified with the Development Services Division.

Approx. Scale 1:2,000 - 1 in = 167 ft

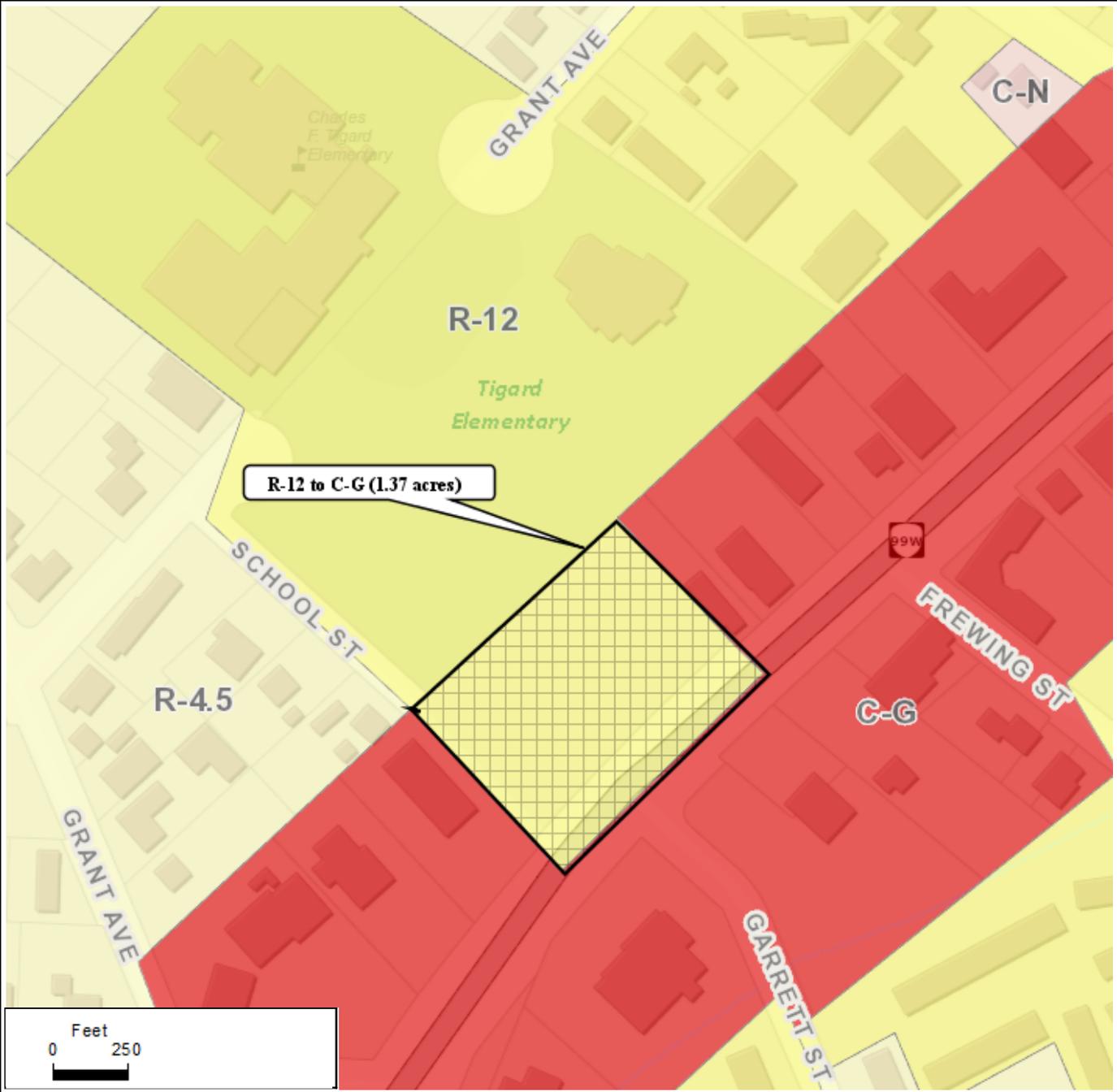
Map printed at 09:19 AM on 05-Nov-15

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TIGARD MAPS

City of Tigard  
13125 SW Hall Blvd  
Tigard, OR 97223  
503 639-4171  
www.tigard-or.gov





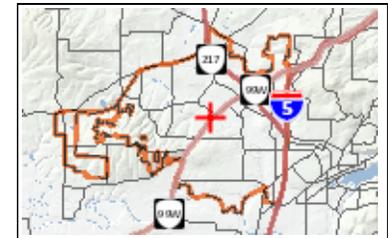
## VICINITY MAP

CPA 2015-00005  
ZON 2015-00007

Medium Residential (R-12)  
Preservation

SITE B

Subject Site



Information on this map is for general location only and should be verified with the Development Services Division.

Approx. Scale 1:2,000 - 1 in = 167 ft

Map printed at 09:11 AM on 05-Nov-15

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**PLANNING COMMISSION RECOMMENDATION  
TO CITY COUNCIL  
FOR THE CITY OF TIGARD, OREGON**



**120 DAYS = N/A**

**SECTION I. APPLICATION SUMMARY**

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**FILE NO.:** Comprehensive Plan Amendment (CPA) 2015-00005  
Zone Change (ZON) 2015-00007

**FILE TITLE:** MEDIUM DENSITY RESIDENTIAL (R-12) PRESERVATION

**APPLICANT:** City of Tigard  
13125 SW Hall Boulevard  
Tigard, OR 97223

**REQUEST:** The city is initiating this Comprehensive Plan and Zoning Map Amendment to facilitate preservation of R-12 zoned land and ensure it is applied in a location that supports residential use. The City proposes changing the Comprehensive Plan Designations and Zoning District Classifications of the subject parcels in **SITE A** (3 parcels totaling 1.54 acres) from Professional Commercial (C-P) to Medium Density Residential (R-12); and changing the Comprehensive Plan Designations and Zoning Map Classifications of the subject parcel in **SITE B** (1 parcel of 1.37 acres) from Medium Density Residential (R-12) to General Commercial (C-G).

**LOCATION:** **SITE A:** 7303 SW Spruce St., 10705 SW 72nd Ave., 10735 SW 72nd Ave; TAX MAP/ LOT #'s: 1S136AC02200, 1S136AC02400, 1S136AC02500; and  
**SITE B:** 13125 SW Pacific Hwy TAX MAP/ LOT # 2S102CB00200

**COMP PLAN  
DESIGNATION/  
ZONING**

**DISTRICT:** FROM: Medium Density Residential (R-12) and Professional Commercial (C-P)  
TO: General Commercial (C-G) and Medium Density Residential (R-12)

**APPLICABLE  
REVIEW  
CRITERIA:** Community Development Code Chapters 18.380.020 and 18.390.060.G;  
Comprehensive Plan Goals 1, 2, 10; Statewide Planning Goals 1, 2, 10; and  
Metro's Urban Growth Management Functional Plan Title 1.

## SECTION II PLANNING COMMISSION RECOMMENDATION

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The Planning Commission recommends that the City Council adopt by ordinance the proposed Comprehensive Plan and Zoning Map Amendments, as determined through the public hearing process.

## SECTION III BACKGROUND INFORMATION

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### Project History

The city is initiating this Comprehensive Plan and Zoning Map Amendment to facilitate preservation of R-12 zoned land and ensure it is applied in a location that supports residential use. Staff proposes the change in response to two development applications, both of which involve R-12 zoning.

Two pre-application conferences were held in March and August of 2015 for proposals to rezone from C-P to R-12 or R-25 several contiguous parcels located on SW Spruce and 72<sup>nd</sup> Avenue (**Site A**). The owners and interested parties are supportive of the city's legislative proposal to accomplish this.

In April 2015 the city received an application for a Comp Plan and Zone Change (CPA2015-0003/ZON2015-00004) for a parcel owned by the school district zoned R-12 with frontage on Pacific Hwy (**Site B**). The Applicant proposed to change the plan and zoning designation of the site to General Commercial (C-G). In addition to this comprehensive plan and zoning map amendment request, the Applicant requested concurrent Site Development Review approval from the City to allow a 15,085 square foot (SF) specialty retail store with associated parking, circulation, landscaping and site improvements. These applications have been withdrawn, in favor of the city's legislative action to rezone the subject parcel, as proposed.

Pursuant to the City's housing goal to provide opportunities for a variety of housing types to meet the diverse housing needs of current and future City residents, the affordable housing types allowed in the R-12 zone warrant the need to preserve R-12 zoned lands. The timing of the applications identified above is such that the city staff would have likely recommended denial of the proposed R-12 to C-G zone change to avoid loss of R-12 zoned land. However, the city's proposal combines the two zone change proposals so that a finding of no net loss of R-12 can be made through the legislative process.

The locational characteristics of the subject parcels otherwise support the comp plan amendments and zone changes. The property zoned C-P (**Site A**) fronts on a local and a neighborhood street and is adjacent to property zoned R-4.5 and low-density unincorporated Washington County. The adjacent lower class streets and low density residential use zone makes the property more suitable for medium residential use that forms a transition from the C-G zone to the south and the R-12 zone to the north.

Residential-zoned land adjacent to Pacific Hwy is rare in Tigard and is primarily associated with private and public school ownership and use, which is allowed conditionally in residential zones. The Tigard-Tualatin School District has identified the subject property (**Site B**) as surplus and intends to sell it for the highest best use. The proposed C-G zone is the dominant zone along Pacific Hwy (classified as Primary Arterial) and the existing zone of the adjacent parcels.

This action would result in a net increase of 0.17 acres zoned R-12.

## Site Description

**Site A** (3 parcels totaling 1.54 acres) is developed with single-family residences and was annexed in 2006 (ZCA2006-00003), which changed the county zone from Commercial Office (OC) to the City's Professional Commercial (C-P) zone, the zone most closely implementing the County's plan map designation. The current zone does not allow residential use, which the market has identified as its highest best use as evidenced by the pre-application conference applications cited above. The subject site is located across Spruce Street from Fred Meyers and within 1,000 feet of Pacific Hwy.

**Site B** (1 parcel of 1.37 acres) is currently a vacant lot owned by the Tigard – Tualatin School District. The site abuts the south side of the Charles F. Tigard Elementary School. The subject property abuts SW Pacific Highway, a Principal Arterial that is designated in the Metro Urban Growth Functional Plan as a High Capacity Transit Corridor. The highway is also maintained and under jurisdictional ownership of the Oregon Department of Transportation (ODOT). The site is bordered to the east and west by commercial development. The property is the only parcel located along the highway between McKenzie Street and Canterbury Lane, an approximately 1.12 mile segment that is not currently designated for commercial use. The subject site is approximately .25 miles from the Metro Town Center adopted boundary.

## Proposal Description

The city is initiating this Comprehensive Plan and Zoning Map Amendment to facilitate preservation of R-12 zoned land and ensure it is applied in a location that supports residential use. The City proposes changing the Comprehensive Plan Designations and Zoning District Classifications of the subject parcels in **SITE A** (3 parcels totaling 1.54 acres) from Professional Commercial (C-P) to Medium Density Residential (R-12); and changing the Comprehensive Plan Designations and Zoning Map Classifications of the subject parcel in **SITE B** (1 parcel of 1.37 acres) from Medium Density Residential (R-12) to General Commercial (C-G).

## Planning Commission Recommendation

On December 14, 2015 the Tigard Planning Commission held a public hearing to consider the proposal and make a recommendation to Council. As discussed in greater detail in Section VIII of this report and in the minutes of the hearing, public testimony was received and considered by the Planning Commission as part of their deliberations. At the conclusion of their deliberations, the Planning Commission voted 6 to 1 in favor of a motion recommending City Council adopt the proposed amendments.

## SECTION IV. APPLICABLE CRITERIA, FINDINGS AND CONCLUSIONS

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This section contains all the applicable city, state and metro policies, provisions, and criteria that apply to the proposed comprehensive plan amendment and zone change. Each section is addressed demonstrating how each requirement is met.

APPLICABLE PROVISIONS OF THE TIGARD COMMUNITY DEVELOPMENT CODE (TITLE 18)

<b>Chapter 18.380: Zoning Map and Text Amendments</b>	<b>Chapter 18.380.020 Legislative Amendments to the Title and Map A. Legislative amendments. Legislative zoning map and text amendments shall be undertaken by means of a Type IV procedure, as governed by Section 18.309.060G</b>
---	---

FINDING: The proposed legislative amendments are being reviewed under the Type IV legislative procedure as set forth in the chapter. This procedure requires public hearings before both the Planning Commission and City Council.

**Chapter 18.390: Decision-Making Procedures**      **Chapter 18.390.020. Description of Decision-Making Procedures**  
**B.4. Type IV Procedure. Type IV procedures apply to legislative matters. Legislative matters involve the creation, revision, or large-scale implementation of public policy. Type IV matters are considered initially by the Planning Commission with final decisions made by the City Council.**

FINDING: This Comprehensive Plan Amendment (CPA) to the Tigard Comprehensive Plan Designations and Zoning Districts map involves implementation of city policies as applied generally throughout the City of Tigard. Therefore it will be reviewed under the Type IV procedure as detailed in Section 18.390.060.G. In accordance with this section, the amendment is initially being considered by the Planning Commission with City Council making the final decision.

**Chapter 18.390: Decision-Making Procedures**      **Chapter 18.390.060.G. Decision-making considerations. The recommendation by the Commission and the decision by the Council shall be based on consideration of the following factors:**

- 1. The Statewide Planning Goals and Guidelines adopted under Oregon Revised Statutes Chapter 197;**
- 2. Any federal or state statutes or regulations found applicable;**
- 3. Any applicable Metro regulations;**
- 4. Any applicable comprehensive plan policies; and**
- 5. Any applicable provisions of the City’s implementing ordinances.**

FINDING: Findings and conclusions are provided within this report for the applicable listed factors on which the recommendation by the Commission and the decision by the Council shall be based.

CONCLUSION: Based on the findings above and below, these provisions are met.

APPLICABLE COMPREHENSIVE PLAN POLICIES

**Chapter 1: Citizen Involvement**

*Goal 1.1 Provide citizens, affected agencies, and other jurisdictions the opportunity to participate in all phases of the planning process.*

**Policy 2**      **The City shall define and publicize an appropriate role for citizens in each phase of the land use planning process.**

**Policy 5**      **The opportunities for citizen involvement provided by the City shall be appropriate to the scale of the planning effort and shall involve a broad cross-section of the community.**

FINDING: Citizens, affected agencies, and other jurisdictions were given the “opportunity to participate in all phases of the planning process.” Several opportunities for

participation are built into the Comprehensive Plan amendment process, including:

- Public Hearing notification requirements pursuant to Chapter 18.390.060 of the Tigard Community Development Code and Measure 56. Public hearing notice of the Planning Commission and City Council public hearings was sent to the interested parties list (11-5-15) and all property owners within 500 feet of the subject parcels (11-19-15). Measure 56 Notice was mailed to subject property owners.
- A notice was published in the November 19, 2015 issue of The Tigard Times (in accordance with Tigard Development Code Chapter 18.390). The notice invited public input and included the phone number of a contact person to answer questions. The notice also included the address of the City's webpage where the Staff Report to the Planning Commission could be viewed.
- Both Sites A and B were posted with a notice board on November 23, 2015.
- Posting on the City's web site (11-24-15)

CONCLUSION: Based on the findings above, Tigard Comprehensive Plan Goal 1.1 Policies 2 and 5 are met.

## **Chapter 2: Land Use Planning**

*Goal 2.1 Maintain an up-to-date Comprehensive Plan, implementing regulations and action plans as the legislative basis of Tigard's land use planning program.*

**Policy 1**            **The City's land use program shall establish a clear policy direction, comply with state and regional requirements, and serve its citizens' own interests.**

The goals and policies contained in the Tigard Comprehensive Plan provide the basis for the city's land use planning program. This policy is met.

**Policy 2**            **The City's land use regulations, related plans, and implementing actions shall be consistent with and implement its Comprehensive Plan.**

As described in this staff report, the amendment complies with all applicable statewide planning goals, regional regulations, comprehensive plan policies, and serves the interest of the citizens. This policy is met.

**Policy 3**            **The City shall coordinate the adoption, amendment, and implementation of its land use program with other potentially affected jurisdictions and agencies.**

Potentially affected jurisdictions and agencies were given an opportunity to comment. Any comments that were received are addressed in Section VI: Outside Agency Comments. This policy is met.

**Policy 5 The City shall promote intense urban level development in Metro designated Centers and Corridors, and employment and industrial areas.”**

The Metro 2040 Growth Concept Map shows that Pacific Hwy, through Tigard, is designated as a “Corridor.” The proposal to up-zone Site B from residential to commercial would increase development intensity consistent with the “intense urban level development” envisioned for Metro designated corridors. This policy is met.

**Policy 6 The City shall promote the development and maintenance of a range of land use types which are of sufficient economic value to fund needed services and advance the community’s social and fiscal stability.**

In a February 22, 2011 Economic Opportunities Analysis (EOA) conducted by Cogan Owens Cogan, LLC and FCS Group the forecasted 20-year vacant land need for commercial, mixed use and industrial lands in the City over the 2011 to 2031 time period was prepared. As noted in Table 7, Page 9 of the EOA, it was determined that the City would need a *minimum* of 51-acres of vacant commercial land to satisfy its commercial land needs over that 20-year growth period. A moderate estimate of commercial land need of 68-acres was identified and a high forecasted need of 85-acres was projected.

As noted in the January 1, 2014 BLI prepared by the City, the City’s most recent vacant lands inventory identified an existing vacant commercial inventory of 46.55-acres. The proposed comprehensive plan and zoning map amendment will help fill this projected deficit of available commercial land by adding 1.37-acres of commercial land to the City’s vacant commercial land inventory, thereby improving the City’s available commercial development capacity. Furthermore, consistent with this plan policy, the proposed project will enable the transition of the site from school to private commercial use, thereby placing the property back on the public tax rolls and enabling the generation of property taxes from the newly created development. These projected public revenues will enable the funding of needed City services and advance the community’s social and fiscal stability as desired. This Policy is met.

**Policy 7 The City’s regulatory land use maps and development code shall implement the Comprehensive Plan by providing for needed urban land uses including:**

- A. Residential;**
- B. Commercial and office employment including business parks;**
- C. Mixed use;**
- D. Industrial;**
- E. Overlay districts where natural resource protections or special planning and regulatory tools are warranted; and**
- F. Public services**

According to Chapter 9, Economic Development of the City of Tigard comprehensive plan, approximately 85 percent of Tigard residents work

outside of the City limits. Additionally, approximately 69 percent of the existing land in the City is zoned for residential use, while 31 percent is zoned for commercial, industrial, and mixed use development. The proposed zone change will ensure that this balance of residential and employment uses in the City is maintained with a loss of 1.57 acres of land zoned C-P, balanced with a gain of 1.37 acres of C-G (Site B), and 1.37 acres of land zoned R-12 is replaced with 1.57 acres of R-12 (Site A). This policy is met.

## Policy 15

**In addition to other Comprehensive Plan goals and policies deemed applicable, amendments to Tigard's Comprehensive Plan/Zone Map shall be subject to the following specific criteria:**

**A. Transportation and other public facilities and services shall be available, or committed to be made available, and of sufficient capacity to serve the land uses allowed by the proposed map designation;**

**B. Development of land uses allowed by the new designation shall not negatively affect existing or planned transportation or other public facilities and services;**

ODOT's trip generation analysis for Site A (ODOT Comment letter, dated 12-2-2015) showed a reduction of trips, from 220 PM trips under the current C-P zone to 43 PM trips under the proposed R-12 zone. Therefore, a determination of no significant adverse effect on the transportation system can be made for Site A.

The transportation impacts for Site B have been detailed in the Transportation Impact Analysis prepared by Kittelson & Associates, Inc., dated July 15th, 2015. As described in the report, the project site can be developed while maintaining acceptable levels of service and safety on the existing transportation system. No changes in street classifications are necessary. However, the report recommends limiting movements at the SW School Road intersection with SW Pacific Highway to right-in, right-out, and left-in. The northeastern driveway access to the site from SW Pacific Highway will also be restricted and will be limited to a right-in and right-out to ensure safe access from SW Pacific Highway.

The TPR 'Future Conditions Analysis' on page 9 of the report identifies the potential impacts that the existing zoning and proposed zone change could have on the surrounding transportation system using reasonable worst-case development conditions. A detailed review of how the proposed zone change complies with the TPR begins on page 24 of the analysis. Proposed recommended mitigation measures are found on Page 25. Future development of the site will be required to implement these mitigation measures.

In both Sites A and B, additional public services such as stormwater, water and sanitary sewer will connect to existing infrastructure and it is not anticipated that the proposed designation changes to R-12 for Site A and to G-C for Site B will result in additional demands on public services. This policy is met.

**C. The new land use designation shall fulfill a proven community need such as provision of needed commercial goods and services, employment, housing, public and community services, etc. in the particular location, versus other appropriately designated and developable properties;**

Site A's conversion from C-P to R-12 would compensate for the loss of R-12 in Site B. R-12 zoned land permits attached single-family and multi-family housing types, which contribute to the city's variety of more affordable housing stock. Site A is located at 72<sup>nd</sup> Avenue and Spruce Street, a neighborhood and local street, respectively, and is between land zoned low density residential on the north and general commercial to the south. This site is more suitable to residential use over that of Site B, which fronts Pacific Hwy, an arterial.

Site B's conversion to C-G from R-12 would fulfill a proven community need for employment and provision of goods in that location.

The City's 2011 Economic Opportunities Analysis (EOA) forecast a 20-year vacant land need for commercial, mixed use and industrial lands in the City over the 2011 to 2031 time period was prepared. As noted in Table 7, Page 9 of the EOA, it was determined that the City would need a minimum of 51-acres of vacant commercial land to satisfy its commercial land needs over that 20-year growth period. A moderate estimate of commercial land need of 68-acres was identified and a high forecasted need of 85-acres was projected.

As noted in the January 1, 2014 BLI prepared by the City, the City's most recent vacant lands inventory identified an existing vacant commercial inventory of 46.55-acres. The proposed comprehensive plan and zoning map amendment will help fill this projected deficit of available commercial land by adding 1.37-acres of commercial land to the City's vacant commercial land inventory, thereby improving the City's available commercial development capacity.

Furthermore, consistent with this plan policy, the proposed project will enable the transaction of the site from school to private commercial use, thereby placing the property back on the public tax rolls and enabling the generation of property taxes from the newly created development. These projected public revenues will enable the funding of needed City services and advance the community's social and fiscal stability as desired.

Lastly, the proposed comprehensive plan amendment will help create employment opportunities for residents of Tigard, which currently sees approximately 85 percent of its employees work in other communities, according to Chapter 9, Economic Development of the City of Tigard comprehensive plan. This Policy is met.

**D. Demonstration that there is an inadequate amount of developable, appropriately designated, land for the land uses that would be allowed by the new designation;**

Rezoning Site A maintains existing R-12 zone capacity.

As noted above for Site B, there is a projected minimum deficit of vacant commercial land of approximately 4.45-acres. The proposed comprehensive plan and zoning map amendment will reduce this projected deficit by approximately 1.37-acres.

**E. Demonstration that land uses allowed in the proposed designation could be developed in compliance with all applicable regulations and the purposes of any overlay district would be fulfilled;**

**F. Land uses permitted by the proposed designation would be compatible, or capable of being made compatible, with environmental conditions and surrounding land uses; and**

The proposed zones in Sites A and B would allow uses compatible with adjacent uses; there is no reason to believe the property could not be developed in conformance with R-12 and C-G standards. There is no overlay district on the subject properties. This policy is met.

**G. Demonstration that the amendment does not detract from the viability of the City's natural systems.**

The subject properties have been previously developed and are predominantly flat land without any sensitive natural resources. The proposed rezone would not detract from the viability of the City's natural systems. This policy is met.

## **Policy 20**

**The City shall periodically review and if necessary update its Comprehensive Plan and regulatory maps and implementing measures to ensure they are current and responsive to community needs, provide reliable information, and conform to applicable state law, administrative rules, and regional requirements.**

The city is initiating this Comprehensive Plan and Zoning Map Amendment to facilitate preservation of R-12 zoned land and ensure it is applied in a location that supports residential use. Staff proposes the change in response to disparate development community applications (Sites A and B), both involving R-12 zoning. The City's determination to update its Comprehensive Plan and Zoning map through this legislative process will ensure it is current and responsive to community needs and will conform to applicable state law, administrative rules, and regional requirements. This policy is met.

**CONCLUSION:** Based on the findings above, Tigard Comprehensive Plan Goal 2.1 Policies 1, 2, 3, 6, 7, 14, 15 and 20 are met.

## **Chapter 10: Housing**

***Goal 10.1 Provide opportunities for a variety of housing types at a range of price levels to meet the diverse housing needs of current and future City residents.***

## Policy 1

**The City shall adopt and maintain land use policies, codes, and standards that provide opportunities to develop a variety of housing types that meet the needs, preferences and financial capabilities of Tigard's present and future residents.**

Currently, approximately 69% of land is zoned for residential land uses. As noted in the January 1, 2014 BLI conducted by the City, there are a total of 34.26 acres of land zoned R-12 that are vacant.

As identified in the City's most recent BLI map, dated January 1, 2014, the project site has not been identified as a buildable, likely due to its ownership by the school district and aggregation with adjoining school properties. Therefore, the conversion of the site's zoning district to C-G will not have a demonstrable effect on the planned residential capacity of the City.

In 2013 the Council adopted a Housing Strategies report prepared by Angelo Planning Group and Johnson & Reid in support of the Periodic Review update to Goal 10, Housing. This report illustrated that at that time the city had about twice as much buildable land in areas zoned R-7 (72.1 net buildable acres) than in areas zoned R-12 (36.7 net buildable acres). The report analyzed the city's current and future housing needs, which included the following conclusions of relevance to the application:

- "In general, there is a need for some less expensive ownership units and rental units."
- "Single family attached units are projected to meet nearly 20% of future housing need."
- "It is projected that in coming decades a greater share of housing will be attached types, including attached single family."

This type of housing is possible in the R-12 zone, which allows attached and multi-family housing on 3,050 square-foot lots. With this legislative action, the loss of R-12 zoning in Site B is replaced by the increase R-12 zoning in Site A, preserving a versatile residential zone to meet the preferences and financial capabilities of Tigard's present and future residents. This policy is met.

**CONCLUSION:** Based on the findings above, Tigard Comprehensive Plan Goal 10.1 Policy 1 is met.

## APPLICABLE METRO REGULATIONS

### **Urban Growth Management Functional Plan**

#### **Title 1: Housing Capacity**

**The Regional Framework Plan calls for a compact urban form and a "fair-share" approach to meeting regional housing needs. It is the purpose of Title 1 to accomplish these policies by requiring each city and county to maintain or increase its housing capacity.**

#### **3.07.120 Housing Capacity**

**A. A city or county may reduce the minimum zoned capacity of the Central City or a Regional Center, Town Center, Corridor, Station Community or Main Street under subsection D or E. A city or county may reduce its minimum zoned capacity in other locations under subsections C, D or E.**

Site B is located on Pacific Hwy, designated a “Corridor” in the Regional Framework Plan. Therefore, the proposed rezone of Site B from R-12 to C-G, reducing the minimum zoned capacity of R-12 zoned land, is subject to subsection D or E.

**E. A city or county may reduce the minimum zoned capacity of a single lot or parcel so long as the reduction has a negligible effect on the city’s or county’s overall minimum zoned residential capacity.**

As identified in the City’s most recent BLI map, dated January 1, 2014, the project site has not been identified as buildable, likely due to its ownership by the school district and aggregation with adjoining school properties. Therefore, the conversion of the site’s zoning district to C-G will not have a demonstrable effect on the planned residential capacity of the City.

The City’s Housing Strategies Report indicates that “in general, there is a need for some less expensive ownership units and rental units.” This type of housing is possible in the R-12 zone, which allows attached and multi-family housing on 3,050 square-foot lots. With this legislative action, the loss of R-12 in Site B is replaced by the increase in R-12 in Site A, resulting in a marginal net increase of R-12 zoned land and preserving a versatile residential zone to meet the preferences and financial capabilities of Tigard’s present and future residents. This policy is met.

CONCLUSION: Based on the findings above, Metro’s Urban Growth Management Functional Plan Title 1 is met.

## THE STATEWIDE PLANNING GOALS AND GUIDELINES ADOPTED UNDER OREGON REVISED STATUTES CHAPTER 197

The City’s Comprehensive Plan incorporated the Statewide Planning Goals and was acknowledged by the state as being in compliance with state law; therefore, the Statewide Goals are addressed under the Comprehensive Plan Policies Sections. The following Statewide Planning Goals are applicable: Goal 1: Citizen Involvement; Goal 2: Land Use Planning; Goal 10: Housing.

## TRANSPORTATION PLANNING RULE COMPLIANCE

### OAR Section 660-12-0060 Plan and Land Use Regulation Amendments

**(1) If an amendment to a functional plan, an acknowledged comprehensive plan, or a land use regulation (including a zoning map) would significantly affect an existing or planned transportation facility, then the local government must put in place measures as provided in section (2) of this rule, unless the amendment is allowed under section (3), (9) or (10) of this rule. A plan or land use regulation amendment significantly affects a transportation facility if it would:**

**(a) Change the functional classification of an existing or planned transportation facility (exclusive of correction of map errors in an adopted plan);**

The proposed R-12 zone for Site A and C-G zone for Site B will not require or result in any changes to the functional classification of any transportation facility in the vicinity of the site.

**(b) Change standards implementing a functional classification system; or**

The proposed C-G zoning will not require or result in any changes to the standards that implement the functional classification system.

**(c) Result in any of the effects listed in paragraphs (A) through (C) of this subsection based on projected conditions measured at the end of the planning period identified in the adopted TSP. As part of evaluating projected conditions, the amount of traffic projected to be generated within the area of the amendment may be reduced if the amendment includes an enforceable, ongoing requirement that would demonstrably limit traffic generation, including, but not limited to, transportation demand management. This reduction may diminish or completely eliminate the significant effect of the amendment.**

**(A) Types or levels of travel or access that are inconsistent with the functional classification of an existing or planned transportation facility;**

The proposed R-12 zone for Site A will result in future traffic volumes and access in a manner consistent with the functional classification of SW 72<sup>nd</sup> Avenue, a local street, and Spruce Street, a neighborhood route. ODOT's trip generation analysis for Site A (ODOT Comment letter, dated 12-2-2015) showed a reduction of trips, from 220 PM trips under the current C-P zone to 43 PM trips under the proposed R-12 zone. Therefore, with the reduction of trips under the new zone, the type and level of travel and access would be consistent with the existing functional classification of the transportation facilities.

The proposed C-G zoning for Site B will result in future traffic volumes and access in a manner consistent with the functional classification of OR 99W in the study area. Although a component of the C-G zoning site trips are expected to travel behind the subject property along SW School Road and SW Grant Avenue, due to a proposed left turn egress restriction at the OR 99W/SW School Road intersection, the amount is minor and should not be any more significant than the buses that frequented this route when the subject site property was a bus storage facility for the Tigard-Tualatin School District.

**(B) Degrade the performance of an existing or planned transportation facility such that it would not meet the performance standards identified in the TSP or comprehensive plan; or**

The proposed C-G zoning for Site B will degrade the operational performance of the SW School Road/SW Garrett Street/OR 99W intersection with a v/c ratio of greater than 3.0 for the SW School Road approach under year 2035 weekday p.m. peak hour conditions (Appendix H, Kittelson July 15, 2015 TIA). This finding results in a "significant affect" determination, but is remedied by the site access control measures recommended in this report.

**(C) Degrade the performance of an existing or planned transportation facility that is otherwise projected to not meet the performance standards identified in the TSP or comprehensive plan.**

The OR 99W/SW Walnut Street intersection is projected to fail with a v/c ratio of 1.03 under year 2035 weekday p.m. peak hour conditions assuming development under the current R-12 zoning. However, because the v/c ratio remains the same at 1.03 under the proposed C-G zoning development scenario, the performance of this intersection is not degraded further. Therefore, a finding of "significant affect" is not triggered by this section of the TPR.

## CONCLUSIONS AND RECOMMENDATIONS

The proposed C-G zoning for the subject site has the potential to create a significant affect at an aligned OR 99W/SW School Road/SW Garrett Street intersection. This significant affect can be remedied by the following mitigation measures, which are recommended to be applied to any future commercial development of the site through Site Development Review:

- Maintain the current SW School Road alignment and access to OR 99W, but restrict turn movements to right-in/right-out/left-in only by constructing a raised concrete island and traffic separator in the center median lane of the highway.
- Close the current site access to OR 99W across from SW Garrett Street, and construct a new site driveway near the northern property limits. The new driveway would be effectively restricted to right-in/right-out only movements due to the raised traffic separator that already exists in the median lane of the highway

## **SECTION V. ADDITIONAL CITY STAFF COMMENTS**

**The City of Tigard's Current Planning Division, Development Services Division (Engineering), and Public Works Department** had an opportunity to review this proposal and had no objections.

## **SECTION VI. OUTSIDE AGENCY COMMENTS**

The following agencies/jurisdictions had an opportunity to review this proposal and did not respond: **Metro Land Use and Planning, Clean Water Services, Tigard Tualatin School District #23J, Washington County, Department of Land Use and Transportation, Oregon Department of Land Conservation and Development.**

**Oregon Department of Transportation, Region 1** reviewed this proposal and provided a comment letter dated December 2, 2015 from Marah Danielson, ODOT Development Review Planner. ODOT determined that for Site A (7303 SW Spruce St), vehicle trips to OR 99W intersections will likely be reduced and that the proposed zone change from C-P to R-12 does not significantly affect a state highway facility. ODOT determined that for Site B (13135 SW Pacific Highway), vehicle trips to OR 99W intersections at Walnut and Park under the proposed zone change from R-12 to C-G would not significantly affect a state highway facility.

ODOT supports proposed mitigations to address the safety concern of introducing more vehicle turning conflicts at School Street onto OR 99W and recommends the following conditions on subsequent development of the site:

1. Restrict turn movements at the SW School Rd/OR 99W intersection to right-in/right-out/left-in only by constructing a raised concrete island (traffic separator) in the center of OR 99W to prevent vehicles from turning left onto the highway.
2. Close the existing site driveway to OR 99W across from SW Garret St and construction of a new site driveway near the northern property limits (the new driveway location would be restricted to right-in/right-out only movements due to the existing raised traffic separator on the highway).

Future applications for development on the property at 13135 SW Pacific Hwy will be required to implement these mitigation measures through Site Development Review.

## **SECTION VII. INTERESTED PARTIES COMMENTS**

The Planning Commission received and considered both written and oral comments from residents and stakeholders as part of their deliberations on December 14, 2015.

Written comments were submitted by the following interested parties:

- Jim Long, 10730 SW 72<sup>nd</sup> Avenue, Tigard, OR 97223, comments submitted at hearing

Oral comments were submitted by the following individuals:

- Kelly Houssaini, Miller Nash, LLP (Site B representative)
- Mathew Zinzer, DOWEL (Site A representative)
- Noreen Gibbons 10730 SW 72<sup>nd</sup> Ave, Portland, OR 97223
- Nancy Tracy, 7310 SW Pine Street, Tigard OR 97223
- Ann and Nathan Murdock, 7415 SW Spruce Street, Tigard OR 97223

Listed below are the main highlights from the oral and written comments received. The full text of all comments can be found in the project file and Planning Commission minutes of December 14, 2015.

Testimony in favor, received from representatives of the school property, is appreciative of the city being pro-active in amending its comp plan and zoning map to better reflect locational characteristics of Site B.

Testimony in opposition, received from neighbors, identify the following concerns with respect to future development under the proposed R-12 zone for Site A:

Increased traffic and on-street parking,  
Loss of open space and potentially, blocked views  
Lot size not in keeping with neighborhood character  
Preference for retaining the existing C-P zone  
Objection with the legislative process and notice procedures

The Planning Commission was presented copies of all written comments and heard all oral testimony before a motion to recommend approval of the proposed amendments. Overall, the Planning Commission found the project to meet all relevant approval criteria pertaining to the issues raised by the public.

## **SECTION VIII. CONCLUSION**

As demonstrated by the findings above, the proposed changes comply with the applicable Statewide Planning Goals, applicable regional, state and federal regulations, the Tigard Comprehensive Plan, and applicable provisions of the City's implementing ordinances.

Therefore, the Planning Commission recommends that the City Council adopt by ordinance the proposed Comprehensive Plan Amendment and Zone Change, as determined through the public hearing process.

*Gary B. Pagenstecher*

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PREPARED BY: Gary Pagenstecher  
Associate Planner

December 7, 2015

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DATE

*Kenny Asher*

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APPROVED BY: Kenny Asher  
Community Development Director

December 7, 2015

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DATE

**CITY OF TIGARD  
PLANNING COMMISSION  
DRAFT Meeting Minutes  
December 14, 2015**

**CALL TO ORDER**

President Rogers called the meeting to order at 7:00 p.m. The meeting was held in the Tigard Civic Center, Town Hall, at 13125 SW Hall Blvd.

**ROLL CALL**

**Present:** President Rogers  
Vice President Fitzgerald  
Alt. Commissioner Enloe  
Commissioner Feeney  
Commissioner Lieuallen  
Commissioner Middaugh  
Alt. Commissioner Mooney  
Commissioner Muldoon  
Commissioner Schmidt

**Absent:** None

**Staff Present:** John Floyd, Associate Planner; Doreen Laughlin, Executive Assistant; Gary Pagenstecher, Associate Planner; John Floyd, Associate Planner

**COMMUNICATIONS** - None

**CONSIDER MINUTES**

December 7 Meeting Minutes: President Rogers asked if there were any additions, deletions, or corrections to the December 7 minutes; there being none, Rogers declared the minutes approved as submitted.

Before opening the public hearing, President Rogers addressed the commission about the order of the agenda. The commission agreed to change the order of the agenda to complete old business first; so it was decided to begin with the continued public hearing rather than the originally scheduled item. The Comprehensive Plan item "MEDIUM DENSITY RESIDENTIAL (R-12) PRESERVATION Comprehensive Plan Amendment (CPA) 2015-00005" would be heard afterward.

**REOPEN CONTINUED PUBLIC HEARING**

President Rogers reopened the continued public hearing.

**HERITAGE CROSSING ZONE CHANGE AND SUBDIVISION (ALTERNATIVE PROPOSAL- CONTINUED: ZON2015-00006/SUB2015-00015/ADJ2015-00003**

**REQUEST:** The applicant is requesting a concurrent Zoning Map Amendment, Subdivision, and Special Adjustment to street standards to develop approximately 9.10 acres located at 15435 SW Hall Boulevard. The quasi-judicial zoning map amendment would change 6.05 acres of the project site from R-12 to R-7, with no change in zoning to the remaining 3.05 acres. Associated with the application is a concurrent

request for subdivision of the site into 62 single-family lots, and a special adjustment to street standards to allow new local streets to match existing streets that adjoin the property. The applicant submitted a similar proposal earlier this year, which was indefinitely suspended by the City Council on October 20, 2015 (see file ZON2015-00002, SUB2015-00001, VAR2015-00001). **APPLICANT:** Venture Properties **LOCATION:** 15435 SW Hall Blvd **ZONES:** R-12 to R-7 **APPLICABLE REVIEW CRITERIA:** Community Development Code Chapters 18.370.020.C.9, 18.380.030.C, and 18.430.040.A; and Metro Urban Growth Management Functional Plan Title 1

## STAFF REPORT

Associate Planner John Floyd read into the record the six items/letters that came in since the last hearing and gave his response to each one:

- An email from Vice President Fitzgerald dated 12/8/15 in which she requested updated letters from Metro (regarding Title 1) and the Tigard Housing Planner (both letters were provided for their information.)
- Two letters – one from TVF&R and one from ODOT – stating that neither agency had objections to the project. ODOT had a list of recommended conditions of approval should the Planning Commission decide to approve the project.
- Joint letter from the Fair Housing Council of Oregon and the Land Housing Advocates – This is significant because:
  - It supports staff recommendation of denial citing:
    - Policy 2.1.15.C-D
    - Policy 10.1.1
  - Project would “negatively impact housing choice, diversity, and affordability within Tigard.”
  - It would endanger Washington County’s ability to affirmatively further fair housing under the federal Fair Housing Act.
    - Tigard is held to this same requirement as the City receives federal money.
  - Cited the Washington County Consolidate Plan 2015-2020 regarding housing conditions.
    - Dramatic changes in poverty and vacancy rates in the last ten years due to suburbanization of poverty.
    - Incredibly tight rental market
    - Increased demand for affordable housing – both renters and homebuyers.
- Letter from Brian Harper of Metro
  - States they have withdrawn their previous objection based on Title 1
  - Also said that their change of position should not be used to settle the issue, as there remain other code and policy issues for the PC to consider.
- Updated letter from Tigard Housing Planner – Marissa Grass
  - Main Points:
    - Cited two studies that concluded affordable ownership and rental housing is of particular importance at this time.
    - Tigard has over 2.6 times the amount of buildable land zoned R-7 as compared to R-12
    - Proximity to services is relevant factors in multiple comp plan policies.
    - Issues of compatibility are false – multiple parts of the city where R-7 adjoins R-12

- Recommends project should be denied to preserve existing opportunities for needed housing with R-12 zoning.

At this point, John addressed the 76 page document package the applicant had turned in the previous week, noting that the staff report addresses most of the issues that had been raised in those documents. He said there were two parts of the recommended “Draft Findings of Fact” proposed by the applicant and presented to the City Council – specifically on page 3 of the “Draft Findings of Fact” regarding 18.390.030.B.3 – Evidence of Change in the Neighborhood that he believes are relevant:

“The area has become increasingly less dense since 1983.”

- Staff does not concur with this proposed finding (detailed on page 18 of the Staff Report)
  - Land immediately to the west was up-zoned from R-4.5 to R-7.
  - Cumulative density along northern and western boundaries actually increased in 1996 as part of Applewood Subdivision Approval

“The area that has developed around the Site has developed under low-density residential standards.”

- Both Comp Plan and TDC would define adjoining properties as “Medium-Density Residential”
- Existing zoning is similar in intensity than adjacent properties

## **STAFF RECOMMENDATION**

Staff recommends the Planning Commission DENY the proposed zone change based on findings and evidence contained in Section V of the Staff Report.

## **APPLICANT’S PRESENTATION**

Attorney Mike Robinson spoke on behalf of the applicant and said rather than go over the applicant presentation again that they would like to hear what the public has to say and then they would rebut both the documents that had come into the record and whatever might be said during the testimony time.

## **TESTIMONY IN FAVOR - None**

## **TESTIMONY IN OPPOSITION - None**

## **APPLICANTS REBUTTAL**

Attorney Mike Robinson came up again and reminded the commissioners that when you look at it, what you’re really looking at is a difference of twelve units; that’s the difference between what was submitted before - which requested the entire site be zoned R-7 - versus the compromise application which is asking to be partly zoned R-7 with R-12 remaining adjacent to Hall Blvd.

Regarding the Metro letter – the reason the Metro letter is in the record is that Commissioner Fitzgerald asked staff to obtain a letter from Metro. In the prior application Metro had said “We don’t think the application meets Title 1.” In shorthand, the Title 1 standard is – you can change a

zoning map designation so long as it has what Title 1 refers to as a “negligible effect.” There’s no definition of that except what you would think of as the ordinary dictionary definition – “small.” So having the letter we have from Metro in the record now is helpful for this body - it now says in the first sentence of the 2<sup>nd</sup> paragraph is “We’ve reviewed the new proposal from the applicant and have decided to withdraw our previous objection.” That’s an appropriate position on Metro’s part. We’re talking about just 12 units – a negligible effect. So Metro’s concluded that this application satisfies Title 1. That’s a significant change from their position last time, and I think that’s due to the applicant’s willingness to compromise – leaving the R-12 up on Hall Blvd and putting R-7 where it belongs – adjacent to all of those single family homes with the wide lots. Please remember we’re talking about a loss of 12 dwelling units out of a total of 6,308. I think Metro is correct that it’s a negligible effect. I think this commission can make that same finding and we’d like you to make that finding.

Regarding the Fair Housing Council letter. Let me divide that letter into two parts. There’s a reference to Tigard Comp Plan Policies and I can tell you that as late as today, Ms. Bragar, who’s an attorney at Garvey Schubert, and who is one of the two authors of the letter. had not read the application. I emailed her Metro’s letter and she said to us “Would you send us the application?” So they wrote the letter without having read the application. Clearly they read the staff report, but I think before you write a letter, you really should read the application.

The letter is really divided in two parts – the plan policies that one could find by looking in the staff report – and this Washington County Consolidated Plan. That plan is not an approval criteria. It’s important for us to understand housing needs in this county, but it’s not a land use regulation, it’s not a Comprehensive Plan provision – it’s not relevant – it’s not approval criteria that you would find relevant to this kind of application. Moreover, the plan covers the entire county. Think about the big UGB expansion areas – River Terrace in this city – South Cooper Mountain in Beaverton, North Bethany in Washington County... there are literally thousands of multi-family and attached units. So to the extent that someone wants to argue, as the Fair Housing Council has done, that losing a mere 12 units by rezoning R-12 to R-7 on a portion of this site, somehow violates that plan... I think is just wrong because there are many 100’s if not 1000’s of units in these three large UGB areas that provide for multi-family and attached single-family dwelling opportunities. So even if the plan were an approval criterion, we’ve had these large expansion areas that Metro brought into the boundary in 2002 that are now being developed. Look at River Terrace. Those areas have more than added to the small lot, attached single-family and multi-family development far, far excess of the 12 units we’re talking about.

Mr. Robinson addressed the three plan policies that the Fair Housing letter referred to that were in the staff report:

Comp Plan Policy 2.1.15.C is met by the applicant because there is a need for housing in the R-7 zone. In the words of the plan policy “In this particular location.” That’s the operative factor in that plan policy. That policy is not concerned with city-wide conditions – it’s concerned with “in this particular location.”

Comp Plan Policy 2.1.15.D is met by the applicant because there’s an inadequate amount of R-7 land. Ms. Doukas’ slide presentation and the narrative demonstrates the fact that there’s more need for R-7 land here than R-12.

Comp Plan Policy 10.1.1 is frankly not an applicable standard in any kind of a development application. It is direction to the city to adopt certain kinds of codes - it's the plan's guidance for the city saying "Implement this plan a certain way." Not only does it not apply to development applications, even if it did – it doesn't refer to map amendments – and that's what's before you tonight; the map amendment.

So while we respect the good work the Fair Housing Council does, this letter doesn't offer you any reason to deny this application. The Washington County Consolidated Plan is neither an approval criterion, nor is it particularly relevant to the outcome, because it ignores the fact that we have literally hundreds of acres of new land that have come into the boundary and that are being developed with different kinds of non-large lot single family homes.

The only zones that touch and abut this site are R-5 and R-7 – not R-12. Our point is that if you look at the map, this site is abutted by R-5, which is low density. Most of the neighbors who live in R-7 would believe they're low density as well – not medium density. The only reason this piece is still R-12 is the ownership. It's only with the passing of the owner that this property came on the market. Had this property been actively developed, I think you could safely conclude that it wouldn't be R-12 today. It's the only R-12 on that side of the street – it's surrounded by either R-7 or R-5 zones.

When you voted last time, a number of you made comments about wishing the applicant had done something different and tried something else. That's why we came back – we thought this was a worthy effort to make – we don't think it's appropriate, nor is it required by the code, to put R-12 next to existing R-7 and R-5 single family zoning district developments – we think if the compromise should be made – leave the R-12 adjacent to Hall Blvd. That supports, in staff's view, the transit line on Hall – but change the rest to R-7 which results in a compatible, similar development. Your code is flexible enough to allow that. The evidence in the record supports the necessary findings that this body would need to make to approve this. We think this is an application that's well supported by the evidence, and that you can approve.

## QUESTIONS

**There are many places in the staff report where staff points out a policy and then feels that policy isn't met and then additionally that it couldn't be conditioned to be met. What is your reaction to that?**

I could go through each policy but I can divide my responses in general into two groups. One: A number of the plan policies cited in the staff report are not applicable for one of two reasons – either they're aspirational – they use language like "should" rather than mandatory language like "shall" or, more importantly, as I cited earlier to one of the plan policies in chapter 10, they're really direction to the city about how to implement the plan. They don't have a good role in applying to development applications. In some cases, in my opinion, they simply don't apply in the way staff suggested they do. You can find, as our findings document did, that many of those plan policies simply aren't applicable, shouldn't be applicable because they're not mandatory, or simply don't apply to development applications.

The second general reason is in the case of those plan policies that do apply – you have to judge about which set of evidence that you think better implements the plan policy. We think Ms. Doukas did a very good job showing the history and why those important criteria providing for a

zone change are met. Those plan policies are satisfied by substantial evidence submitted by the applicant and that gives the Planning Commission a basis to approve the application.

**You mentioned that the twelve lots are negligible – was there any thought of changing it around to actually meet the minimum lot requirement?**

Mimi Doukas AKS Engineering, representing Venture, came up to address that question. The response to that has to do with how we transition those densities and how we create the community internal to the property, and what is the right way to transition that density? If we put that much of the smaller product in, it begins to change the entire character of the neighborhood – it changes the streetscape. So it really has to do with the community building within the neighborhood and the right way to transition from a market standpoint.

Mike Robinson came up and noted that if the Justice Department or a court were to look at whether the city or the county is complying with the Fair Housing Law, both state and federal, they're going to look at the totality of the situation. They'd look at whether the city has a pattern of discriminating against low-income individuals through their zoning actions. "First of all," he said, "federal law is not an approval criterion for this application, but more importantly, the totality of the circumstances in the city and county is that with all of those UGB areas, there's no possibility, in my view, that the Fair Housing Law is not satisfied in this application because it has such a de minimis effect on your zoning capacity. It wouldn't rise to the level that any responsible attorney would suggest to their governing body that a case should be brought against the city."

**FINAL COMMENTS OF STAFF**

Associate Planner John Floyd: Page 3 of the staff report comes down to a lot of the staff's recommendations on this. There are two tables on page three. The first is a density comparison and the second is a comparison of allowed housing types. The applicant's argument is that this is just a loss of 12 units. It's not just a matter of numbers, I could site some specific policies if you'd like but it's also a matter of location. There's a cumulative amount of services in this area that we think's also appropriate that relates to the number. That's the adjacency and proximity of schools with sidewalk connections to all the schools; it's the proximity of a small neighborhood commercial center nearby, the city library. Cumulatively these things are important. All these factors were a reason why this area was assigned to R-12 zoning back in 1983 and these locational factors haven't changed. Staff's position is that the reason the City Council applied the zoning back then is still relevant today. The applicant has also talked about a need for R-7 zoned land, without analysis of impact to housing types allowed under R-12. The analysis has been pretty one-sided in terms of the numbers. I think the application is incomplete in that regard too.

**APPLICANT REBUTTAL**

Mike Robinson came up and said "I could certainly go through this again, but I think we've said enough and I think you all are probably thinking you've heard enough, so I thank you for your time."

**PUBLIC HEARING CLOSED**

## DELIBERATION ON ZONING CHANGE

There was some discussion about how difficult this decision is due to a very strong staff report but also a very strong application. They decided to focus on the zone change only at this point. The question was whether they would support the R-12 or whether they would support the application as proposed.

Some of the responses from the commissioners:

- The relatively “soft” responses from the agencies such as Metro don’t make it easy to make the decision. It’s back to the commission to decide.
- I’m torn as well, it seems like the appropriate thing to do is to maintain the current zoning based on where it is and the supply in the city for that zone. I’m leaning towards maintaining the R-12 zone.
- I’d probably agree with that. As far as River Terrace and other locations in the city being brought into the conversation... this area is for housing for people who can’t afford more expensive homes or economic values. River Terrace in my opinion as a development... there are a few little locations that are affordable but beyond that I don’t think we have enough affordable housing in Tigard and I think to change that zoning in this specific area - while some may view that the city facilities are not in proximity, but for our city they’re in good proximity to that neighborhood. I think we should remain the same zoning to help out more people.
- I’m leaning the other way. I like the idea of having the boundaries at the street and I like what’s being proposed. It’s got the lower and the higher density. I think that 12 lots is de minimis.
- I was one of the one’s that said I’d like to see something in the middle and now the applicant came back with something. The question does open up as other commissioners have mentioned is – it isn’t going to count – it’s minimal to me. But losing enough housing count – I’m really looking at that criteria as well – everyone’s referencing River Terrace. It’s also stating in there about “in a particular location” – are we talking citywide? Or are we talking in this neighborhood? That’s where I’m having a little harder time right now. Yes, the whole area was (inaudible) and rezoned, or redeveloped – now it’s a little piece. I’m definitely on the fence.
- A couple things stood out in my mind for that area. Is the bussing and walkability and diversity of housing, in that area – which is relatively exclusive. In support of this change – I don’t like thinking that the neighbors come and think they’re not heard. I do think it’s important and in our Comprehensive Plan – I believe it’s 1.1 that says there’s supposed to be public input. I think we’re supposed to take that into account and should weigh very strongly. I like this plan that came back with a compromise. Would I want my property to back up against two row-houses? Not so much. I’d want it to be a single house like mine. Also –Metro’s comment pushed me a long way to believing this is a negligible change to the inventory at this point and that they’re not opposed. That helped me get a long way towards what the neighbors and the developers are wanting.

At this point there were some questions about the two islands. One of the commissioners noted that in Mimi Doukas’ presentation, she had one of the alternates having R-12 for both islands. It was decided to reopen the hearing and ask Mimi Doukas some questions.

## **REOPENED THE PUBLIC HEARING**

President Rogers spoke to Mimi Doukas – “So the Commission itself is looking at R-12 for both islands. Has that been a consideration or something that has been looked at before? Does this pencil out?”

Doukas – It’s more than just penciling out. It’s how the community functions and how you can bring those houses to market but from a purely logistical and density standpoint, you can’t just mirror that island over. You won’t hit the right densities with the R-12. There’s land within that right of way and the storm water facility. You can’t hit the right numbers with that exact type of product. It would push it to smaller lots or attached products. It all sort of unravels at that point. One of the commissioners showed Ms. Doukas a drawing that showed both islands with R-12. Ms. Doukas pointed out that there was also a big red box in the corner of the plan stating, “This does not meet minimum density.”

## **STAFF COMMENT**

John Floyd said he believes there are ways the applicant could possibly modify the site plan to meet minimum density should the Planning Commission want to go with the additional island option as was being discussed. He said staff could work with the applicant to find ways to meet minimum density if that’s the route they would like to take.

Commissioner Muldoon asked if they could condition the application.

Ms. Doukas stated “If I’m hearing you right, you’re concerned about diversity of housing and adding another island is not going to add to the diversity of housing, it’s going to add a few more of a product type that we’ve already got within the community. We are providing smaller lots and we’re providing larger lots and all you’re talking about doing is changing the proportion of those. It’s still diversity of housing and you’re still providing opportunity within the region so I feel like the way that it’s currently designed, we really are already there. It’s talking about degrees.

## **CLOSED PUBLIC HEARING**

## **DELIBERATION**

There was more discussion as to who was for and who was against the application. It didn’t appear there was a majority. Some were for, some against.

At this point, Mike Robinson asked if he could come back on behalf of the applicant. President Rogers said he could and he reopened the public hearing.

## **REOPENED PUBLIC HEARING**

Attorney Robinson said, “If we could be sure that staff says there are ways to meet the minimum density, we’d be happy to work with staff and I think we’d consider what you’ve been tossing around which is R-7 on the perimeter, R-12 on the islands with the condition of that. So I’m thinking if you wanted to do a motion that proposed that – provided we can do the minimum density without too difficult gymnastics to get there, that might work. I simply don’t know your code well enough – I’d have to look at it to determine what you’d need to do, but I think we’re

willing to consider. But we're talking about detached single-family lots. We don't want to do attached here. We don't think the neighbors want to see attached here. So if the motion could provide for R-7 on the perimeter, R-12 in the interior islands that you've been referring to, with the proviso that there's got to be a way to meet minimum density – because you'll get a different letter from Metro if we don't meet minimum density - I think we could be comfortable with that. But it's got to be detached lots; we're not offering attached.

John Floyd said staff would be willing to work with the applicant if the Planning Commission wants to give direction. He said he would recommend against specifying a specific number of lots – providing the applicant meets the minimum density.

President Rogers closed the public hearing.

## **CLOSED THE PUBLIC HEARING**

### **MOTION ON ZONING CHANGE**

**Commissioner Muldoon** made the following motion – “**Motion is for ZON2015-00006 as proposed but with R-12 for the second island meeting minimum density - working with staff - with detached lots.** Seconded by **Commission Middaugh**

A vote was taken.

In Favor: Commissioners Muldoon, Middaugh, and Feeney  
Opposed: Commissioners Lieuallen, Fitzgerald, and Schmidt  
Abstain – President Rogers

Count is 3 for, 3 against, 1 abstention

### **VOTE RESULTS IN A 3 -3 TIE**

When questioned, the commissioners said they needed to see more before deciding.

At this point, it was decided to continue the hearing to get a revised plan which hopefully the commission would be in favor of. After looking at the calendar it was decided to continue to January 25.

President Rogers gave a summary to the applicant of what's wanted: “The commission desires to see that R-12 zoning applied to that second island – and again, minimum density requirements applied to the entire development itself.” Is that correct, Commissioners? All the commissioners agreed.

## **HEARING IS CONTINUED TO JANUARY 25, 2016**

### **FIVE MINUTE RECESS**

### **PUBLIC HEARING**

**MEDIUM DENSITY RESIDENTIAL (R-12) PRESERVATION Comprehensive Plan Amendment (CPA) 2015-00005; Zone Change (ZON) 2015-00007**

**REQUEST:** The city is initiating this Comprehensive Plan and Zoning Map Amendment to facilitate preservation of R-12 zoned land and ensure it is applied in a location that supports residential use. The City proposes changing the Comprehensive Plan Designations and Zoning District Classifications of the subject parcels in **SITE A** (3 parcels totaling 1.54 acres) from Professional Commercial (C-P) to Medium Density Residential (R-12); and changing the Comprehensive Plan Designations and Zoning Map Classifications of the subject parcel in **SITE B** (1 parcel of 1.37 acres) from Medium Density Residential (R-12) to General Commercial (C-G). **APPLICANT:** City of Tigard **LOCATION: SITE A:** 7303 SW Spruce St., 10705 SW 72nd Ave., 10735 SW 72nd Ave; TAX MAP/ LOT #'s: [1S136AC02200](#), 1S136AC02400, 1S136AC02500; and **SITE B:** 13125 SW Pacific Hwy TAX MAP/ LOT # 2S102CB00200 **ZONES:** FROM: Medium Density Residential (R-12) and Professional Commercial (C-P) TO: General Commercial (C-G) and Medium Density Residential (R-12) **APPLICABLE REVIEW CRITERIA:** Community Development Code Chapters 18.380.020 and 18.390.060.G; Comprehensive Plan Goals 1, 2, 10; Statewide Planning Goals 1, 2, 10; and Metro's Urban Growth Management Functional Plan Title 1.

## **STAFF REPORT**

Associate Planner, Gary Pagenstecher went over the staff report (the staff report is available for viewing and downloading on-line one week before each hearing.)

Pursuant to the City's housing goal to provide opportunities for a variety of housing types to meet the diverse housing needs of current and future City residents, the affordable housing types allowed in the R-12 zone warrant the need to preserve R-12 zoned lands. The timing of the applications identified above is such that the city staff would have likely recommended denial of the proposed R-12 to C-G zone change to avoid loss of R-12 zoned land. However, the city's proposal combines the two zone change proposals so that a finding of no net loss of R-12 can be made through the legislative process.

The locational characteristics of the subject parcels otherwise support the comp plan amendments and zone changes. The property zoned C-P (Site A) fronts on a local and a neighborhood street and is adjacent to property zoned R-4.5 and low-density unincorporated Washington County. The adjacent lower class streets and low density residential use zone makes the property more suitable for medium residential use that forms a transition from the C-G zone to the south and the R-12 zone to the north.

Residential-zoned land adjacent to Pacific Hwy is rare in Tigard and is primarily associated with private and public school ownership and use, which is allowed conditionally in residential zones. The Tigard-Tualatin School District has identified the subject property (Site B) as surplus and intends to sell it for the highest best use. The proposed C-G zone is the dominant zone along Pacific Hwy (classified as Primary Arterial) and the existing zone of the adjacent parcels.

This action would result in a net increase of 0.17 acres zoned R-12.

**Tom McGuire, Assistant Community Development Director**, came up and explained in a bit more detail as to why the city is recommending this swap of zoning. "We've had a pre-app and applicant interested in this school district property, wanting to change that zone to C-G and, according to their market research, that was the best use that they were proposing for that property. We've also had two pre-application conferences for the other property – the commercially zoned property - to change that to R-12; but no application has come in. Given the

other applications that we've had with R-12 zone changes, we wanted to make sure that we are consistent in the findings that we're making on these quasi-judicial cases. Looking at the two sites - we saw that they are just about the same size. The neighborhood commercial is slightly larger and so, given we had interest from both property owners - we had development interests - we looked at that and we thought that it made the most sense to actually step in as a city and legislatively swap those zones. We've got the R-12 residential in a better place for residential zoning off of Hwy 99W and we've got commercial development on Hwy 99W, which makes more sense. Again, as Gary explained, there are two places on 99W zoned residential - the rest of it is all commercial. And those are in areas where there are schools, or were school property - and it was placed there through the conditional use process. So that's just a little more background as to why this decision was made, and why this is before you.

## **STAFF RECOMMENDATION**

In Section VIII CONCLUSION, Staff recommends that the Planning Commission recommend approval of the proposed amendments to the Tigard City Council as determined through the public hearing process.

## **TESTIMONY IN FAVOR**

**Kelley Hossaini with Miller Nash 111 SW 5<sup>th</sup> Ave., Suite 3400, Portland 97204** - representing the Tigard Tualatin School District - said they are very pleased with staff being pro-active and taking this opportunity to put both of these pieces of property into zones that make more sense given where they are. The property on Hwy 99 has been owned by the School District since the 1940's - maybe even earlier. It was zoned residential to accommodate the district's use of the property. The property was declared as surplus in 2005 and put it on the market in 2006. There was some interest in the property from Commercial uses - no interest whatsoever from anyone wanting to do residential. The property was taken off the market due to the economic downturn. It was put back on the market a couple of years ago and a year ago to Leadership Circle interested in the property and actually wants to put a "Natural Grocer" there which I think would be great to have there and near the elementary school. If the zone change fails there will just be an incorrectly zoned piece of property that will sit there - not on the tax rolls, not providing jobs, taxes for the city - it would just sit there because we've never had any interest whatsoever in a residential use right there on 99. She thinks the zone change makes sense. As a reminder, this is a zone change only - there are no development applications before you. Any concern about the actual workings of what might go on the site - those would best be tackled when applications actually come in.

**Matthew Zinzer - 720 SW Washington St., Suite 750, Portland 97205** works for Dowell, the planning and civil engineers for Leadership Circle, said they have been looking at this "Natural Grocer" and working well with the City of Tigard and ODOT to make sure the site is feasible and we are working diligently for that and we see no issues with the design continuing forward.

## **TESTIMONY IN OPPOSITION**

**Noreen Gibbons - 10730 SW 72<sup>nd</sup> Ave., Portland 97223** - said her property is just across the street from Site A. She bought her property because it was commercially zoned across the street and she didn't believe there would ever be a bunch of houses located there. That was her impetus to buy the property in the first place. She received a letter (notice) in the mail and also saw the sign that was put up on the corner advertising this meeting. She wanted to make a point to say that she

believes that is very inadequate notification. A day or two after the sign was put up it was curled and now, because of the rain and wind, it's down on the ground. She believes community input is important and she is interested in quality of life. She is concerned about additional traffic and believes this would cause more cars, more congestion. The character of the neighborhood does not match R-12; it will change the character of the neighborhood – and not for the better. Two and three story houses there will cause her to lose her view of Parrot Mountain and it will impact her quality of life.

**Nancy Tracy – 7310 SW Pine St., Tigard 97223** – has lived there for 53 years. Her focus is the value of open space. She believes kids need physical exercise and could be playing out in that area. She believes the city is calling this a done deal. Tigard should make this land available for kids and parents and for walking. She thinks this is being rushed. There should be a moratorium. She would like the city to stop looking at open space as waste land.

**Nathan Murdock – 7415 SW Spruce St. Tigard 97223** – had also submitted a letter which was an exhibit in the staff report. He said most of what he and his wife have to say are on the back of that letter. He is concerned about traffic with safety as the main concern. Parking is a problem now – it would only get worse. He is not opposed to residential but make it residential for what's there and ¼ acre lots should be a very minimum.

**Ann Murdock – 7415 SW Pine St., Tigard 97223** – People are parking in front of her home now because of the property at the end of 74<sup>th</sup> where there are a lot of little homes – four feet apart – with families that have at least 2 cars apiece. It's a mess already; more houses would only add to that mess. She said she may not even be able to get into her driveway. She likes the idea of a park being there instead.

**Jim Long – 10730 SW 72<sup>nd</sup> Ave., Tigard** – spoke on behalf of at least four people so was allowed 15 minutes for testimony - he distributed written testimony. He said that he'd hit heavy traffic getting back and was sorry to have to submit a draft (**Exhibit A**). He noted that he is the elected chair of CPO-4M, the Citizens Participation Organization serving East Tigard – Metzger and Durham. He said the CPO had voted unanimously to endorse retaining the Commercial-Professional zoning for Site A (the property at the corner of 72<sup>nd</sup> Ave & SW Spruce Streets. He didn't like the file title – stating that it is a misnomer and really is misleading to citizens. It's not “Residential Preservation” – it's not commercial professional preservation – it's a swap. He hopes it's not a done deal. He stated that the staff report incorrectly states that the current zone does not allow residential use. He tried calling the number listed on the notice to get more information – it was supposed to be Gary Pagenstecher's number but it was somebody else and he said he never got a response back (Monday, December 7). He noted that Code 18.390.053 C2A – Goal 1 of the Comprehensive Plan states that citizens should be involved in every part of the process. He stated that he came in to the city on November 20 to ask to look at the documents and Gary said there weren't any. He doesn't believe that's transparency. Public notices didn't hold up to the weather. He had photos (shown on the written testimony) showing they had blown down on the ground – ineffective – unreadable. He believes this is a violation of due process 197.763. He said this hearing doesn't have the effect it should have. He doesn't like the zone swap being heard as a legislative process instead of a quasi-judicial process. He strongly believes this should be a quasi-judicial proceeding – it allows more citizen involvement and appeal that way. This seems to be highly irregular – it's like the fox watching the henhouse. He noted that he saw a “for sale” sign up on the property and wonders if this a done deal. He spoke about the land not being level – contrary to the staff report. He would like the city to leave this area as commercial.

Mr. Long stated that the staff report incorrectly states the site description of Site A stating that the current zone does not allow residential use. He said that is wrong because there are two houses on Site A now that have been lived in as residences for decades and that across 72<sup>nd</sup> there are residences that are zoned Commercial. He noted several things that the CPO would like to see: All documents that prompted the city to (inaudible) applicant for Comprehensive Plan Amendment in 2015-00005 zone change; the date the application was deemed complete; the affidavit of record; the staff report related to ordinance documents for 2006 annexation of what is now Site A; the housing strategies report by Angelo Planning Group that's referred to; 2010 Cogan Owens Cogan Economic Opportunities Analysis of 2011; the commercial inventory of the city; the residential inventory of the city; population projections; jobs projections; language in the 2006 annexation ordinance that justified the importance of Site A to be commercial-professional. Because of so many outstanding questions, they ask for a continuance for an opportunity to provide more evidence or for the Planning Commission to deny this. They would like the Planning Commission to deny the city Planning's Department request and maintain the existing zoning for Site A.

## **QUESTIONS FROM THE COMMISSIONERS**

**So are you asking to leave Site A the way it is? Commercial?** Yes, leave it commercial. It's been for sale for years – maybe they're asking too much. I don't know, but it doesn't seem like there's justification to change it to 3-story high attached houses or whatever it would be – but R-12 would allow something like that, from what I understand.

## **REBUTTAL**

Gary Pagenstecher, Associate Planner, said his comments (Exhibit A) were distributed to the Planning Commissioners and he doesn't have a copy. He said he doesn't have a rebuttal except that he'd heard issues with process and substance and that there are definite ideas the neighborhood has for this property. "The city has a different idea which we've adequately set forth in the staff report and it's consistent with the current property owner's interest. If the Planning Commission decides to continue, I'm sure I'll have a very specific rebuttal at that point."

## **PUBLIC HEARING CLOSED**

No further testimony or questions from the audience are allowed.

## **DELIBERATION**

There was some deliberation over who is for this swap of zones and who is not. The School District is wanting the swap as testified about earlier. Gary pointed out that the city had made a point of including the owners of Site A in the proposal and that they'd agreed with it. The owner is interested in having a residential zone there – they're interested in that because they realize the market is there for residential use but they hadn't found (that market) since it'd been annexed for commercial use. So the city and the current property owners have a consistent goal here – rezoning to a residential use.

## **MOTION**

**Commissioner Fitzgerald** made the following motion: **“I move the Planning Commission forward a recommendation of approval to the City Council of application CPA2015-00005 and Zone Change ZON2015-00007 and adoption of the findings that have been received.”**

**Commissioner Feeney** seconded the motion.

A vote was taken and the motion passed 6 – 1; with Commissioner Lieuellen opposing.

## **MOTION PASSES - 6-1**

President Rogers noted that the City Council makes the final decision and that this will go to City Council on January 12<sup>th</sup>.

## **OTHER BUSINESS**

Tom McGuire reminded the commission that the next Planning Commission meeting will be held on January 11<sup>th</sup> and that it will be a training session.

## **ADJOURNMENT**

President Rogers adjourned the meeting at 9:34 p.m.

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Doreen Laughlin, Planning Commission Secretary

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ATTEST: President Rogers



# City of Tigard Memorandum

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To: Mayor John L. Cook, City Councilors

From: Gary Pagenstecher, Associate Planner

Re: Response to Public Testimony and Council Questions from the January 12, 2016 Council Hearing regarding Comprehensive Plan Amendment (CPA) 2015-00005/Zone Change (ZON) 2015-00007

Date: January 26, 2016

## Background

The city has initiated this legislative Comprehensive Plan and Zoning Map Amendment to facilitate preservation of R-12 zoned land and ensure it is applied in a location that supports residential use in support of the City's Housing Goal. The Planning Commission voted 6-1 in favor of the proposal. In response to public testimony at its January 12<sup>th</sup> hearing, Council continued the hearing and directed staff to respond to public testimony to clarify issues related to land use process and to neighborhood livability at Site A.

## Public Testimony

The property owners and development representatives for Sites A and B testified in favor of the proposed zone changes at Sites A and B.

**Staff Response:** While the City's proposal furthers owners' interests, the city's legislative proposal also implements Comprehensive Plan Goal 10.1 to "provide opportunities for a variety of housing types at a range of price levels to meet the diverse housing needs of current and future City residents." The public interest component of the proposal and the unique opportunity to swap zones in two different locations is the reason the city is processing this as a legislative matter. The City's activism in this matter opportunistically takes advantage of the timing of development applications to pursue its housing policy through preservation of R-12 zoned land and ensuring it is applied in a location that supports residential use.

Neighborhood residents in the vicinity of Site A testified in opposition to the proposed zone change at Site A. Seven neighbors testified that the zone should either remain Professional Commercial, or be changed to Low-Density Residential or to a zone that would preserve open space (Parks and Recreation). General concerns were raised about potential development impacts associated with future development of Site A under the R-12 zone, including loss of character and livability, increased traffic, height, density, and parking, and loss of open space. Neighbor testimony was not opposed to the proposed zone change at Site B.

Staff Response: Future development of Site A would be subject to the use and development standards in the Tigard Development Code. It is important to note that both use and development intensity are greater under the existing C-P zone versus the proposed R-12 zone. A brief comparison between the C-P and R-12 zones indicates that a variety of institutional and commercial uses which are permitted outright in the existing C-P zone, are permitted conditionally in the R-12 zone. Some uses such as office and personal service are permitted outright in the C-P zone but are prohibited in the R-12 zone. In addition, several neighbors mentioned objections to the potential height of residential development in the R12. The development standards in the existing C-G zone actually allow more intense development including greater maximum height (C-P: 45' vs R-12: 35') and greater site coverage (C-P: 85% vs R-12: 80%).

Jim Long, Chair of CPO-4M (serving East Tigard, Metzger and Durham) submitted written testimony on a number of specific issues, which are addressed here:

Testimony asserts that the Type III quasi-judicial process is applicable, not Type IV, and is a detriment to citizen involvement, in this case.

Staff Response: In general, legislative actions involve the adoption of law or policy applicable Citywide or to a broad geographical area of the City. Quasi-judicial actions involve the application of existing law or policy to a small area or a specific factual situation. There are different legal requirements for the processing of these two types of actions. In general, quasi-judicial actions require greater notice and procedural protections than do legislative actions. In the Tigard Development Code, Legislative is defined as a land use decision that applies to a large number of individuals or properties (18.120.030.105); Quasi-Judicial is defined as an action that involves the application of adopted policy to a specific development application or amendments (18.120.030.143).

The city decided to use the Type IV process in support of the city's housing policy because the proposed commercial-to-residential zone swap involved two separate sites and potential modification of important policy issues that would not be possible under a quasi-judicial action.

Type III notice requirements that are not required under the Type IV process include notice to property owners within 500 feet of the subject property and posting of a notice on the subject property. The city, however, went beyond the minimum required under the Type IV procedure and instead followed the Type III notice procedures in this case to ensure broader citizen input on an import issue for which the city is an advocate.

Testimony asserts a violation of due process, which denies interested parties full and fair opportunity for citizen involvement. Specifically, 1) the posted notices have the wrong date and time for the City Council hearing, had blown down and were not re-erected, 2) the mailed notice included an ineffective phone number, 3) notices were not received by five neighbors within 200 feet, and 4) documents cited in the notice were not available for timely review.

Staff Response: 1) All notices included a City Council hearing date of "Tuesday, January 12, 2015," which should have read "2016;" While this error is regrettable, it is an obvious error given the time of year. Regardless, if a person were to be confused by the error they had multiple other sources to consult to confirm the date including by contacting staff directly. 2) Four different types of notices were sent out. The published and posted notices included the correct planner's phone number, but the mailed notice included a typo with one digit incorrect in the planner's phone number. Again, while the error is

regrettable, the planners name was clearly spelled out so that they could have been contacted by calling the city and asking for him by name; 3) Notice is sent to property owners, which may partially explain this outcome if the referenced neighbors are not owners. Again, the Type IV procedure does require a notice to specific neighbors. The CD department provided the mailed notice to all property owners within 500 feet as a courtesy to allow them to be part of the process. All neighbors who signed up to testify are owners and are included in the mailed notification list; 4) Notices refer to documents available on file for review by the public. At the time of the request, the staff report and supporting documents had not yet been generated, but were available seven days prior to the Planning Commission hearing, as required. However, at that time Mr. Long met with both John Floyd and Gary Pagenstecher and the details of the proposal were explained to him. Additionally, CD staff have repeatedly offered to answer questions or provide any information that might be requested.

Testimony identifies a commercial real estate sign at Site B that does not meet city code and is misleading.

Staff Response: While this sign is notable in the context of the proceeding, it is not a material part of the subject land use process. The city is empowered to authorize temporary signs (18.780.100) which are identified as balloons, banners and lawn signs in the code. Commercial real estate signs such as the one identified, are neither prohibited nor authorized and are therefore not regulated in Tigard. Advertising a property currently zoned residential as a commercial property is misleading, which comes at some risk to the realtor.

Testimony asserts that the application title "R-12 Preservation" is misleading, that both commercial zoned property and R-12 zoned property are in deficit, that the annexation report creating Site A's C-P zone may support leaving it zoned commercial.

Response: The project description accompanying the title helps to clarify the city's intention. The intent of the proposal is to preserve opportunities for R12 zoning. The report does find that both commercial and R-12 zoned lands are in deficit, but the city has specific policies regarding preserving opportunities for housing affordability and diversity that the proposal is focused on. The original annexation application ZCA2006-00003 for Site A approved the zone that was closest to the Washington County zone it replaced, consistent with the standards for annexations in 18.320.020.C. There was no more consideration given to the chosen C-P zone than that.

### Council Questions

Mayor Cook inquired about the notice date error raised in public testimony and requested the site be reposted.

Staff Response: The notice date error is addressed above in the staff response to public testimony. Staff reposted both Sites A and B on January 19<sup>th</sup> for the February 2, 2016 hearing.

Councilor Snider inquired about the process issues raised in public testimony, including appeal of a legislative decision, and whether Site A had ever been considered by the city for use as a park.

Staff Response: The process issues are addressed above in the staff response to public testimony. An appeal of a Council legislative decision is heard by the Land Use Board of Appeals (LUBA). The city's

Parks and Facilities manager does not recall Site A ever being brought to the city's attention and specifically, that it was not considered during the Park Bond acquisition process.

Councilor Woodard asked what zone applies to the residences along 74<sup>th</sup> avenue at Spruce Street, what the parking issue is referred to in the public testimony, and whether other zones, e.g. R-7 were considered in addition to the proposed R-12 zone.

Staff Response: The R-4.5 zone flanks SW 74<sup>th</sup> Avenue south from Spruce Street until it turns and becomes SW Torchwood Street where the zone becomes R-12(PD) at White Oak Village. Neighbors contend that parking spill over from White Oak Village contributes to cars parking along 74<sup>th</sup>. The city's proposal did not consider any zone other than R-12 zoning both because the property owner expressed interest in that zone as an alternative to the existing C-P zone and the city wanted the R-12 zone to avoid its loss on Pacific Hwy. Staff believes that a lower density residential zone would not provide a significant buffer between the commercially zoned property to the south and east and the low-density residential zone to the north, which is an express function of the C-P zone. The site is ideal for R12 zoning given its location near transit and abundant services and there are several similarly zoned R12 areas nearby.

Councilor Henderson inquired about the commercial real estate sign identified in public testimony.

Staff Response: The commercial real estate sign issue is addressed above in the staff response to public testimony.

#### Staff Recommendation

Support the city's housing goal to ensure housing choice and affordability by preserving the R12 zoning and approve the proposed zone changes on Sites A and B (Ordinance A).

Alternatively, deny the proposed zone change on Site A and approve the proposed zone change on Site B (Ordinance B) in support of the TTSD's rezone proposal.

AIS-2541

6.

**CCDA Agenda**

**Meeting Date:** 02/02/2016

**Length (in minutes):** 60 Minutes

**Agenda Title:** Consideration of Park Maintenance Fee

**Prepared For:** Toby LaFrance

**Submitted By:** Carol Krager,  
Central Services

**Item Type:** Ordinance  
Resolution

**Meeting Type:** Council  
Business Meeting -  
Main

**Public Hearing** No

**Newspaper Legal Ad Required?:**

**Public Hearing Publication**

**Date in Newspaper:**

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**Information**

**ISSUE**

Continued Public Hearing on Park Maintenance Fee, establishing Tigard Municipal Code 3.75 Park Maintenance Fee and amending the Master Fees and Charges

**STAFF RECOMMENDATION / ACTION REQUEST**

Staff requests Council consider adoption of an ordinance to establish TMC 3.75 Park Maintenance Fee and the resolution to amend the Master Fees and Charges Schedule.

**KEY FACTS AND INFORMATION SUMMARY**

During the Budget Committee meetings, the committee considered the course of Tigard's General Fund and the services it supports: Police, Library, Community Building, and Parks. The General Fund revenues grow approximately 3.5% annually, while expenses grow 4.0% annually. Tigard has taken actions in prior years to limit cost growth and has added incremental revenues. The Budget Committee decided to take a different direction with the Fiscal Year 2016 budget; moving Parks to a separate fund modeled after a utility. The Committee chose parks because of the needs to maintain and operate current park lands compounded by the need to develop and maintain the parks purchased with the \$17 million Park Bond that has expanded Tigard's park acreage by 30 percent. The direction in the FY 2016 budget was to fund all park services using a fee that will be paid as part of the utility bill and then prioritize the General Fund resources that used to fund existing parks maintenance and operations during the FY 2017 budget process.

Staff presented initial policy issues to Council on October 20, 2015 and November 17, 2015. At the November 17, 2015 Workshop, Council instructed staff to bring the Park Maintenance Fee (PMF) forward for consideration in a public hearing. The fee is limited in scope to the current level of parks maintenance, operations, and recreation plus identified deferred maintenance needs. Council determined that they would consider expanding park funding to needed capital and additional recreation purposes at a later date and possibly fund those via a special option property tax levy.

Based on Council feedback during the workshops, on January 12, 2016, staff presented an ordinance and resolutions to establish the Park Maintenance Fee (PMF) which included the following policy directions from Council:

- Keep fee structure simple
- Fee paid by residential and non-residential customers
- Fee based on scenarios #1 (current level of services) & #2 (deferred maintenance) only
- Use annual average cost for the deferred maintenance scenario to level out the resulting fee amount
- Use annual inflation factor as outlined in the rate consultant's report
- Include program for low income fee assistance

Staff presented the complete fee and program at a public hearing on January 12, 2016.

Council considered the program and continued the hearing. Based on the hearing actions on January 12, 2016, staff is bringing forward documents for Council approval that will result in the following:

- A Park Maintenance Fee of \$3.75 per Equivalent Dwelling Unit per month
- Revenues from the PMF of approximately \$1,014,000 per year
- The fee will pay for:
  - \$500,000 of the current \$2.2 million in current maintenance and operations (Scenario #1), and
  - the entire \$514,000 of deferred maintenance annually (Scenario #2)
- By funding the \$500,000 of current maintenance and operations (Scenario #1), the General Fund that previously supported that expenditure will now support:
  - Approximately \$100,000 of the over \$250,000 needed to fund the opening of the Library on Thursdays with limited services. The remaining funding for the Thursday openings comes from the Washington County Cooperative Library Service operating levy passed in November 2015.
  - Approximately \$400,000 of General Fund intended to bolster reserves and aid a financially sustainable General Fund. This will not be programmed for expenditures.
- By limiting the PMF to \$3.75, there are no additional General Fund resources freed up to be programmed during the FY2017 Budget process.
- The PMF is indexed at 4.26% annually, starting July 1, 2017
- The PMF can be adjusted as decisions are made that lead to additional parks maintenance and operations services, such as purchasing additional park land and

developing existing park land. Staff will need to present the additional cost for Council consideration.

- The PMF has a program that will reduce the fee by half for qualifying low income households

Attached to this Agenda Item are the following documents:

1. Ordinance Establishing TMC 3.75 Park Maintenance Fee
2. Exhibit A to the Ordinance - TMC 3.75 Draft
3. Resolution to Amend the Master Fees and Charges Schedule to include the PMF
4. Exhibit A to the Resolution outlining the PMF and changes to the Master Fees and Charges Schedule
5. The rate consultants report on "Tigard Parks Maintenance Fee Report to Council for January 12, 2016 Public Hearing"

### **OTHER ALTERNATIVES**

Council can choose to return parks maintenance and operations to the General Fund and not enhance park services.

Council can choose to pass a fee that is more than \$3.75 per EDU per month, enabling the direction of the Budget Committee to free up General Fund that previously supported parks. The available resource would then be allocated during the FY 2017 Budget process.

### **COUNCIL OR CCDA GOALS, POLICIES, MASTER PLANS**

Strategic Plan Goal #4 - *Fund the vision while maintaining core services.*

### **DATES OF PREVIOUS CONSIDERATION**

Budget Committee Meetings on:

- April 20, 2015
- April 27, 2015
- May 4, 2015
- December 15, 2015

Council Meetings on:

- October 20, 2015 Workshop
- November 17, 2015 Workshop
- January 12, 2016 Hearing

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### **Attachments**

Ordinance

TMC 3.75

Resolution

Resolution Exhibit A - Park Maintenance Fee

Rate Consultant's Report

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CITY OF TIGARD, OREGON  
TIGARD CITY COUNCIL  
ORDINANCE NO. 16-

AN ORDINANCE AMENDING THE TIGARD MUNICIPAL CODE TO ESTABLISH A PARK MAINTENANCE FEE

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WHEREAS, Park maintenance and operations funding from the General Fund is limited; and

WHEREAS, Tigard has been unable to maintain park service levels for existing park land; and

WHEREAS, Tigard has added park land without an adequate revenue source to maintain and operate the parks; and

WHEREAS, Tigard has determined to fund a portion of parks maintenance and operations through a Park Maintenance Fee; and

WHEREAS, The amount of the fee will pay for a portion of the existing level of parks maintenance, operations, and recreation; and

WHEREAS, The fee will also pay for parks maintenance and operations services that have been deferred due to limited resources; and

WHEREAS, The fee will be paid by residential and non-residential utility customers within the City of Tigard; and

WHEREAS, The fee will be adjusted annually to account for inflation and any new maintenance costs caused by changes in parks such as additional parks or newly developed parks or new or expanded parks operations; and

WHEREAS, Council may establish a program to provide assistance to lower income utility bill payers to be paid from Park Maintenance Fee revenues.

NOW, THEREFORE, THE CITY OF TIGARD ORDAINS AS FOLLOWS:

SECTION 1: Chapter 3.75 of the Tigard Municipal Code is hereby created as provided in Exhibit A.

SECTION 2: This ordinance shall be effective 30 days after its passage by the council, signature by the mayor, and posting by the city recorder.

PASSED: By \_\_\_\_\_ vote of all council members present after being read by number and title only, this \_\_\_\_ day of \_\_\_\_\_, 2016.

---

Carol A. Krager, City Recorder

APPROVED: By Tigard City Council this \_\_\_\_\_ day of \_\_\_\_\_, 2016.

\_\_\_\_\_  
John L. Cook, Mayor

Approved as to form:

\_\_\_\_\_  
City Attorney

\_\_\_\_\_  
Date

**Chapter 3.75 PARK MAINTENANCE FEE**

**Sections:**

- 3.75.010 Creation and Purpose**
- 3.75.020 Definitions**
- 3.75.030 Administrative Officers Designated**
- 3.75.040 Park Maintenance Fees Allocated to the Park Maintenance Fund**
- 3.75.050 Determination of Park Maintenance Fee**
- 3.75.060 Determination of Amount, Billing and Collection of Fee**
- 3.75.070 Waiver of Fees in Case of Vacancy**
- 3.75.080 Administrative Provisions and Appeals**
- 3.75.090 Administrative Policies**
- 3.75.100 Penalty**
- 3.75.110 Severability**

**3.75.010 Creation and Purpose**

A park maintenance fee is created and imposed for the purpose of maintenance of city parks. The park maintenance fee shall be paid by the responsible party for each occupied unit of real property. The purposes of the park maintenance fee are to charge for the service the city provides in maintaining public parks and to ensure that maintenance occurs in a timely fashion, thereby reducing increased costs that result when maintenance is deferred.

**3.75.020 Definitions**

As used in this chapter, the following shall mean:

A. Public Works Director. The public works director or the public works director's designee.

B. Developed property or developed use. A parcel or legal portion of real property, on which an improvement exists or has been constructed. Improvement on developed property includes, but is not limited to buildings, parking lots, landscaping and outside storage.

C. Equivalent Dwelling Unit. Equivalent Dwelling Units (EDUs) are the basis for equally apportioning annual Park Maintenance Fee revenue requirements among customer groups.

D. Finance Director. The finance and information services director or designee.

E. Residential Property. Property that is used primarily for personal domestic accommodation, including single family, multi-family residential property and group homes, but not including hotels and motels.

F. Nonresidential Property. Property that is not primarily used for personal domestic accommodation. Nonresidential property includes industrial, commercial, institutional, hotel and motel, and other nonresidential uses.

G. Occupied Unit. Any structure or any portion of any structure occupied for residential, commercial, industrial, or other purposes. For example, in a multifamily residential development, each dwelling unit shall be considered a separate occupied unit when occupied, and each retail outlet in a shopping mall shall be considered a separate occupied unit. An occupied unit may include more than one structure if all structures are part of the same dwelling unit or commercial or industrial operation. For example an industrial site with several structures that form an integrated manufacturing process operated by a single manufacturer constitutes one occupied unit. Property that is undeveloped or, if developed, is not in current use is not considered an occupied unit.

Exhibit A

H. Responsible Party. The person or persons who by occupancy or contractual arrangement are responsible to pay for utility and other services provided to an occupied unit. Unless another party has agreed in writing to pay and a copy of the writing is filed with the city, the person(s) paying the city's water and/or sewer bill for an occupied unit shall be deemed the responsible party as to that occupied unit. For any occupied unit not otherwise required to pay a city utility bill, "responsible party" shall mean the person or persons legally entitled to occupancy of the occupied unit, unless another responsible party has agreed in writing to pay and a copy of the writing is filed with the city. Any person who has agreed in writing to pay is considered the responsible person if a copy of the writing is filed with the city.

I. Park Maintenance. Any action to operate and maintain city parks, including, but not limited to repair, renewal, replacement, reconstruction, minor improvements, programing, recreation and other park activities. Park maintenance does not include the capital development, construction or acquisition of new parks or undeveloped parks.

**3.75.030 Administrative Officers Designated**

A. Except as provided in subsections B and C of this section, the public works director shall be responsible for the administration of this chapter. The public works director shall be responsible for developing administrative procedures for the chapter, administration of fees, and for the purposes of establishing the fee for a specific occupied unit, the consideration and assignment of categories of use, and parking space requirements subject to appeal in accordance with this chapter.

B. The public works director shall be responsible for developing and maintaining park

maintenance programs for the maintenance of city parks and, subject to city budget committee review and city council approval, allocation and expenditure of budget resources for park system maintenance in accordance with this chapter.

C. The finance director shall be responsible for the collection and calculation of fees and the appeals process under this chapter.

**3.75.040 Park Maintenance Fees Allocated to the Park Maintenance Fund**

A. All park maintenance fees received shall be deposited to the park maintenance fund or other fund for the purpose of operation and maintenance of the city park system. The park maintenance fund shall be used for park maintenance. Other revenue sources may also be used for park maintenance. Amounts in the park maintenance fund may be invested by the finance director in accordance with state law. Earnings from such investments shall be dedicated to the park maintenance fee fund.

B. The park maintenance fund shall not be used for other governmental or proprietary purposes of the city, except to pay for an equitable share of the city's overhead costs including accounting, management and other costs related to management and operation of the park maintenance program.

**3.75.050 Determination of Park Maintenance Fee**

A. For residential and non-residential property, the fee shall be charged on a per equivalent dwelling unit (EDU) basis. For single family and multifamily accounts, each occupied unit within the residential property is one EDU. The calculation of an EDU for commercial and industrial accounts will be defined in the Master Fees and Charges Schedule.

Exhibit A

B. The park maintenance fee rates shall be established by council resolution and shall be calculated based on all or a part of:

1. The city’s projected five-year maintenance forecast plan for operations and maintenance of the city’s park system; and

2. Any new maintenance costs incurred during the five-year program. New costs include, but are not limited to, maintenance of additional park land, new park development of existing park land, and new or expanded programing and operations. These will be addressed annually based on estimates from the public works director.

C. The park maintenance fee rate shall be annually adjusted to account for new costs (as identified in 3.75.050.B.2) and according to an annual index as defined in the Master Fees and Charges, effective the first billing cycle following July 1<sup>st</sup> of each year, starting July 1, 2017.

D. Council may establish a program to reduce the park maintenance fee for lower income utility payers. The program may be administered by city staff or a qualified non-profit. The program may be defined in the city’s Master Fees and Charges Schedule.

E. The program shall be reviewed annually as part of the city’s budget process.

**3.75.060 Determination of Amount, Billing and Collection of Fee**

A. The park maintenance fee shall be billed to and collected from the responsible party for each occupied unit. Billings shall be included as part of the utility bill for occupied units utilizing city water and/or sewer, and billed and collected separately for those occupied units not utilizing

city water and/or sewer. All such bills shall be rendered regularly by the finance director and shall become due and payable upon receipt.

B. Collections from utility customers will be applied first to interest and penalties, then proportionately among the various charges for utility services and park maintenance.

C. An account is delinquent if the park maintenance fee is not paid by the due date shown on the utility bill. The city may follow the procedures for collection of delinquent accounts set forth in Sections 12.03.030 and/or 12.03.040, including termination of water and/or sanitary sewer service.

**3.75.070 Waiver of Fees in Case of Vacancy**

A. Pursuant to subsection F of this section, when any developed property within the city becomes vacant, upon written application and approval by the finance director, the park maintenance fee shall thereafter not be billed and shall not be a charge against the property.

B. The finance director is authorized to cause an investigation of any property for which an application for determination of vacancy is submitted to verify any of the information contained in the application. The finance director is further authorized to develop and use a standard form of application, provided it shall contain a space for verification of the information and the person signing such form affirms under penalty for false swearing the accuracy of the information provided therein.

C. When any developed property within the city has the utilities shut-off due to vacancy, the park maintenance fee shall be waived for the duration of the vacancy as described in subsection F of this section.

Exhibit A

D. When any multi-occupied developed property within the city has one or more vacancies as described in subsection F of this section, the responsible party may request, in writing, a waiver of a portion of the park maintenance fee applicable to the vacant units.

E. When a change of use occurs, a vacancy has been filled, or a property is developed, it is the responsible party's responsibility to inform the city of any change so the proper park maintenance fees may be assessed. If the responsible party does not inform the city of any change, the city shall cancel the vacancy waiver and charge the responsible party as per subsection F of this section.

F. For purposes of this section, a unit of property is vacant when it has been continuously unoccupied and unused for at least 30 days. Fees shall be waived in accordance with this section only while the property remains vacant. The waiver duration is for six months. After six months, the responsible party must re-apply for the waiver if the property continues to be unoccupied and unused. The responsible party has 30 days to re-apply for the vacancy waiver after the expiration of the six month waiver. Any occupancy or use of the property terminates the waiver. As a penalty for not reporting a change in property vacancy, the city may charge any property two times the appropriate park maintenance fee that would have been due without the vacancy waiver for prior billing periods upon determining by whatever means that the property did not qualify for waiver of charges during the relevant time. The decision of the finance director under subsections A, B, C, D and F of this section shall be final. (Ord. 10-08 §1, 2010; Ord. 10-01 §2)

**3.75.080 Administrative Provisions and Appeals**

A. The responsible party for an occupied unit may request reconsideration of the amount of

the fee by submission of a written application to the finance director. The application shall be submitted in sufficient detail to enable the finance director to render a decision.

B. To address the submitted request, the city may follow the procedures for utility charge adjustments set forth in Section 12.03.040.

**3.75.090 Administrative Policies**

A. The following policies shall apply to the operation and scope of this chapter:

1. Parks maintenance fees imposed under this chapter shall apply to all occupied units, occupied units owned and/or occupied by local, state and federal governments, as well as property which may be entitled to exemption from or deferral of ad valorem property taxation.

2. Publicly owned park land, open spaces and greenways shall not be subject to the park maintenance fee.

3. Areas encompassing railroad and public right-of-way shall not be subject to the park maintenance fee.

4. Railroad property containing structures, such as maintenance areas, non-rolling storage areas and areas used for the transfer of rail transported goods to non-rail transport shall be subject to park maintenance fees.

5. For newly developed properties, the fees imposed under this chapter shall become due and payable from and after the date when the developed property is occupied and connected to the public water or sanitary sewer system.

B. The public works director and the finance director are authorized and directed to review the operation of this chapter and, where appropriate, recommend changes thereto in the

## Exhibit A

form of administrative policies for adoption of the city council by resolution. Administrative policies are intended to provide guidance to property owners, subject to this chapter, as to its meaning or operation, consistent with policies expressed herein. Policies adopted by the council shall be given full force and effect, and unless clearly inconsistent with this chapter, shall apply uniformly throughout the city.

### **3.75.100 Penalty**

In addition to any other remedy, violation of any provision of this chapter shall be a Class A civil infraction. Each day of delinquency in paying the park maintenance fee constitutes a separate violation.

### **3.75.110 Severability**

A. In the event any section, subsection, paragraph, sentence or phrase of this chapter or any administrative policy adopted herein is determined by a court of competent jurisdiction to be invalid or unenforceable, the validity of the remainder of the chapter shall continue to be effective. If a court of competent jurisdiction determines that this chapter imposes a tax or charge, which is therefore unlawful as to certain but not all affected properties, then as to those certain properties, an exception or exceptions from the imposition of the park maintenance fee shall thereby be created and the remainder of the chapter and the fees imposed thereunder shall continue to apply to the remaining properties without interruption.

B. Nothing contained herein shall be construed as limiting the city's authority to levy special assessments in connection with public improvements pursuant to applicable law. ■

CITY OF TIGARD, OREGON  
TIGARD CITY COUNCIL  
RESOLUTION NO. 16-

A RESOLUTION AMENDING THE MASTER FEES AND CHARGES SCHEDULE TO ADD THE PARK MAINTENANCE FEE

---

WHEREAS, Tigard Municipal Code 3.75 Park Maintenance Fee was adopted on February 2, 2016; and

WHEREAS, The amount of the fee will pay for a portion of the existing level of parks maintenance, operations, and recreation; and

WHEREAS, The fee will also pay for parks maintenance and operations services that have been deferred due to limited resources; and

WHEREAS, The fee will be paid by residential and non-residential utility customers within the City of Tigard; and

WHEREAS, The fee will be adjusted annually to account for inflation and any new maintenance costs created by changes such as additional parks or newly developed parks or new or expanded parks operations; and

WHEREAS, Council may establish a program to aide lower income utility bill payers to be paid from Park Maintenance Fee revenues.

NOW, THEREFORE, BE IT RESOLVED by the Tigard City Council that:

SECTION 1: The Master Fees and Charges Schedule adopted with Resolution 15-31 is hereby amended per Exhibit A.

SECTION 2: This resolution shall be effective 30 days after its passage by the council, signature by the mayor, and posting by the city recorder.

PASSED: This \_\_\_\_\_ day of \_\_\_\_\_ 2016.

---

Mayor - City of Tigard

ATTEST:



Department	Revenue Source	Fee or Charge	Authority	Effective Date
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**PUBLIC WORKS - PARKS**

**Park Maintenance Fee (TMC 3.70)**

Monthly Residential Rate - Single and Multi-Family	\$3.75 / equivalent dwelling unit	4/1/2016
Monthly Non-Residential Rate	\$3.75 / equivalent dwelling unit <sup>1 &amp; 2</sup>	4/1/2016
Reduction for Qualified Low Income Single Family	50%	4/1/2016

Notes:

1 Commercial EDU Calculation (rounded to nearest whole EDU):  
 (Billed Parking Stalls from Street Maintenance Fee \* 0.76 Jobs Per Stall)/15 EDU Factor = EDUs

2 Industrial EDU Calculation (rounded to nearest whole EDU):  
 (Billed Parking Stalls from Street Maintenance Fee \* 1.19 Jobs Per Stall)/15 EDU Factor = EDUs

Calculation of the annual Park Maintenance Fee Index (from FCS Group report "Tigard Parks Maintenance Fee: Report to Council for January 12, 2016 Public Hearing")

Cost Center	Annual Rate	Weight
Personnel	4.80%	0.60
Services/Utilities	3.00%	0.25
Materials/Internal Services	4.20%	0.15
<b>Annual Index (Weighted Average)</b>	<b>4.26%</b>	

TMC 3.75.050.D authorizes the establishment of a program to reduce the Park Maintenance Fee for low income individuals responsible for paying the utility bill.

The reduction will last for 12 billing cycles after which the fee reduction will end or the responsible party can reapply

To Qualify for the reduction, the responsible party:

- 1 Must be the individual(s) on the utility bill
- 2 Provide documented proof of income such as most recent tax statement or W-2.
- 3 Have an income at, or below, 50% of the Median Income for Oregon as set by the US Department of Housing and Urban Development (HUD).

City of Tigard



Tigard Parks Maintenance Fee  
Report to Council for  
January 12, 2016 public hearing

Prepared by FCS GROUP  
In association with  
Conservation Technix, Inc.

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# TABLE OF CONTENTS

---

SECTION I: INTRODUCTION ..... 1

SECTION II: RATE STUDY METHODOLOGY..... 2

    A. Rate Setting Principles and Methodology ..... 2

    B. Fiscal Policies..... 2

    C. Revenue Requirement ..... 3

    D. Rate Design ..... 3

SECTION III: REVENUE REQUIREMENT ..... 4

    A. Introduction..... 4

    B. Operating Forecast ..... 4

        B.1 Non-User Revenue ..... 4

        B.2 Expenditure Projections..... 4

        B.3 Existing User Fees..... 5

    C. Capital Funding Plan..... 5

    D. Summary of Revenue Requirement ..... 6

        D.1 Scenario 1: Funding Parks at Existing Levels ..... 6

        D.2 Scenario 2: Funding Deferred Maintenance ..... 6

        D.3 Scenario 3: Fully Funding CIP..... 7

        D.4 Scenario 4: Develop Current Lands..... 8

        D.5 Scenario 5: Develop New Lands..... 8

        D.6 Scenario 6: Funding New Recreational Programs ..... 8

        D.7 Scenario 7: Funding Special Community Assets..... 8

SECTION IV: RATE DESIGN ..... 9

    A. Introduction..... 9

    B. Parks Utility Funding ..... 9

    C. Customer charges..... 9

    D. Parks Utility Fee Scenarios Analysis ..... 11

    D. Recommended Rate Scenario ..... 11

SECTION V: RATE POLICIES..... 14

TECHNICAL APPENDIX..... 15

## SECTION I: INTRODUCTION

---

The City of Tigard (City) Parks Division maintains, operates, and owns 548 acres of park land which provides citizens with recreational opportunities, maintains environmentally sensitive lands, and meets or exceeds all regulatory standards. In addition to maintaining park land, the public works department is tasked with the maintenance of trails, planning new facilities, and running recreational activities for citizens of all ages.

As Tigard's population and employment grow, the need for recreational opportunities increase as well. The latest voter approved parks bond has enabled the city to acquire a substantial amount of land it intends to develop into community assets but those dollars cannot be used to develop that land into usable parks. Meanwhile, necessary maintenance of existing parks has been deferred in the face of Tigard's constrained general fund.

This report evaluates the utility rate revenue requirement to enable the City's parks fund to meet its ongoing operating and capital expenses and establishes a basis for a local charge to assist in funding any revenue deficiencies. In addition, this report provides a series of scenarios which analyze the revenue requirements in the case that certain parks priorities are fully funded (e.g., addressing deferred maintenance, developing city-owned park land, funding recreational programs, etc.) and what a parks utility fee designed to address those needs would cost citizens and businesses in Tigard.

The purpose of the Tigard Parks Maintenance Fee (PMF) is to provide a reliable source of revenue for ongoing parks operations and maintenance. The reasons for a PMF include:

- ◆ Maintenance is more expensive the longer it is deferred
- ◆ Other financing mechanisms (e.g., system development charges) help construct capital assets but cannot be used for operations
- ◆ Expenditures have been increasing in all city operations putting undue pressure on the General Fund as a limited resource with many demands
- ◆ Over the last 15 years, park land has grown 66% while staffing to maintain parks has increased 12% in Tigard.

## SECTION II: RATE STUDY METHODOLOGY

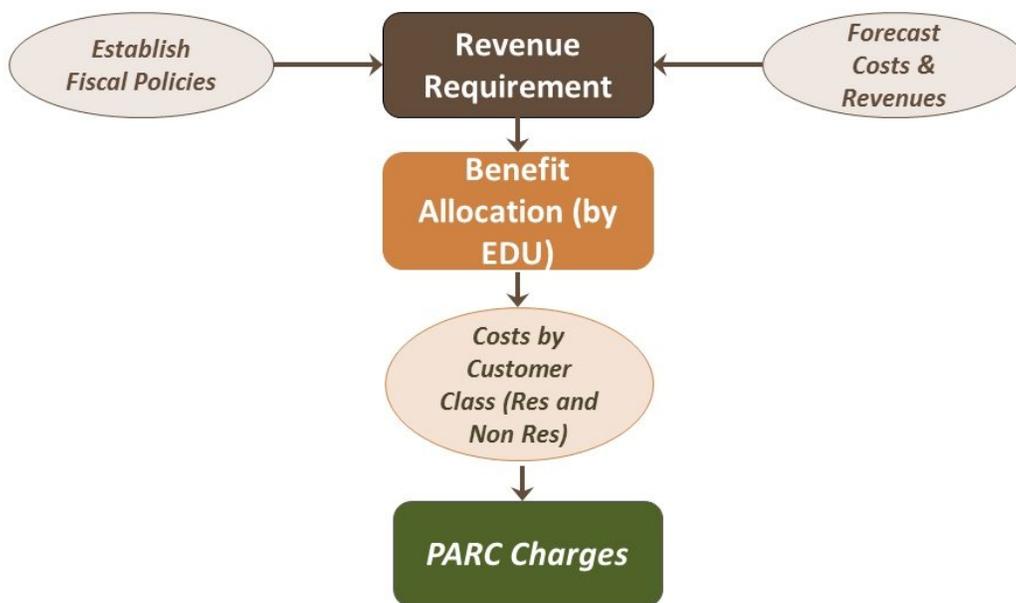
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### A. RATE SETTING PRINCIPLES AND METHODOLOGY

The methods used to establish user rates are based on principles that are generally accepted and widely followed throughout the industry. These principles are designed to produce rates that equitably recover costs from residents and businesses by setting the appropriate level of revenue to be collected from ratepayers, and establishing a rate structure to equitably collect those revenues.

**Exhibit 2.1** illustrates the overview of the methodology used in this rate study process.

Exhibit 2.1: Overview of the Rate Study Process



### B. FISCAL POLICIES

The stewardship of public funds is one of the greatest responsibilities given to the officials and the managers of the City. Therefore, the establishment and maintenance of wise fiscal policies enables City officials to protect public interest and ensure public trust. This study incorporates fiscal policies observed by the City to ensure that current policies are maintained, including reserve levels, capital/system replacement funding and debt service coverage.

## C. REVENUE REQUIREMENT

The revenue requirement analysis will form the basis for a long-range financial plan and multi-year rate management strategy for the parks system. It also enables the City to establish a rate structure which will fully recover the total cost of operating the parks system: capital improvement, capital replacement, operations, maintenance, general administration, fiscal policy attainment, cash reserve management, and expanded programs. Linking rate levels to a financial plan such as this helps to enable not only sound financial performance for the City's parks fund, but also a clear and reasonable relationship between the costs imposed on utility customers and the costs incurred to provide service.

A revenue requirement analysis includes the following core elements to form a complete portrayal of the parks utility's financial obligations.

- ◆ Operating Forecast. Identifies future annual non-capital costs associated with the operation, maintenance, and administration of the system.
- ◆ Deferred Maintenance. Measures the value of asset replacement and current required maintenance activities necessary to maintain adequate parks facilities condition.
- ◆ Capital Funding Plan. Defines a strategy for funding the City's capital improvement program, including an analysis of available resources from system development charges, debt financing, and any special resources that may be readily available (grants, outside contributions, etc.). Identifies if additional funding sources are needed.
- ◆ Revenue Sufficiency Testing. Evaluates the sufficiency of revenues in meeting all financial obligations, including any coverage requirements associated with long-term debt.
- ◆ Rate Strategy Development. Designs a forward-looking strategy for establishing rates to fully fund financial obligations on an annual basis over the projection period.

## D. RATE DESIGN

The principal consideration of rate design is for the rate structure to generate sufficient revenues for the system which are reasonably commensurate with the cost of providing service. The pricing structure is largely dictated by the objectives of the system. Most rate structures consist of a combination of fixed and variable charges. Fixed charges typically attempt to cover system costs that do not vary with usage. Variable charges typically serve two functions, equitably recovering variable costs and encouraging customers to use the system efficiently. In this case, variable costs associated with the parks utility fee are based upon the services and materials the city chooses to fund through the utility fee.

## SECTION III: REVENUE REQUIREMENT

---

### A. INTRODUCTION

A revenue requirement analysis forms the basis for a long-range financial plan and multi-year rate management strategy. The analysis is developed by completing an operating forecast that identifies current and future annual operating costs, deferred maintenance costs, and a capital funding plan that defines a strategy for funding the capital improvement needs of the City not being addressed by SDCs, funding for additional recreational activities and programs.

### B. OPERATING FORECAST

The purpose of the operating forecast is to determine at what level the potential rates and charges are sufficient to recover the costs the City incurs to operate and maintain the parks system. The fiscal year (FY) 2015-16 budget provided the primary basis for developing a multi-year forecast for FY 2016-17 through FY 2025-26 expenses. The complete 10-year forecasts are included in the **Technical Appendix**. The ensuing discussion highlights the key assumptions used to develop the parks operating forecast.

#### B.1 Non-User Revenue

Historically, parks funding in Tigard has been dependent upon general fund transfers, parks SDCs, voter-approved bonds, and grants. A summary of key non-user fee revenue assumptions includes:

- ◆ **General Fund Transfers:** General fund transfers provide Tigard's parks with the majority of needed operations and maintenance dollars. It is assumed that these transfers will cease if the parks utility fee is implemented.
- ◆ **SDCs:** SDC fund transfers provide Tigard's parks with the majority of the capital costs necessary for development of new park land or purchase of other assets. These incomes were generally not included in the modeling of this fee.
- ◆ **Voter-Approved Parks Bond:** Residents of Tigard agreed to an increase in their property taxes in order to provide Tigard with money to purchase new parks land. Given that this income stream is finite, bond proceeds were not included in the model.

#### B.2 Expenditure Projections

- ◆ Salaries were budgeted at \$904,416 in FY 2015-16 and were anticipated to grow at 4% annually.
- ◆ Benefits were budgeted at \$374,149 in FY 2015-16 and were anticipated to grow at 6.67% annually.
- ◆ Materials and services were budgeted at \$605,432 and costs were anticipated to grow at 3% annually.

- ◆ Capital Outlay expenses were budgeted at \$49,000 in FY 2015-16 and capital outlay expenses were expected to grow at 4.5% annually.
- ◆ Payments for Citywide Support Services were budgeted at \$270,417 in FY 2015-16 and annual transfers out were expected to grow at 4.1% annually.

It should be noted that recreation program expenses at current levels include a portion of the annual salary, benefits and services budgets. The PMF analysis includes a sensitivity analysis removing the recreation expenditures from the overall budget. In FY 2016, the recreation spending is \$177,410 (\$70,000 salary, \$30,798 benefits and \$76,612 in professional services). If recreation expenses are not included in the PMF revenue requirement, they would likely continue to be funded by the city’s General Fund and User Fees.

Each PMF fee development scenario contains a unique set of parameters with cost and fee assumptions. Discussion of each scenario is included in Section III.D. Detailed tables of scenario-based cost assumptions can be found in **Appendix D** and further cost estimate detail can be found in **Appendix E**.

### B.3 Existing User Fees

Tigard’s parks generate funds when users reserve areas, pay to participate in recreational sports leagues, or to enter designated facilities. City staff indicated the fees would defray \$70,000 of the total department expenditures. We assume that user fee revenue increases by 3 percent per year for the 10-year planning horizon. **Exhibit 3.1** shows the forecasted budget expenditures based on the FY 2015-16 budget including the user fee revenue reduction.

**Exhibit 3.1: Parks Utility Fee Scenarios**

Adopted Budget: 10-Year Projections	Fiscal Year 2016-17	Fiscal Year 2017-18	Fiscal Year 2018-19	Fiscal Year 2019-20	Fiscal Year 2020-21
<b>Salaries</b>	\$ 940,593	\$ 978,216	\$ 1,017,345	\$ 1,058,039	\$ 1,100,360
<b>Benefits</b>	399,105	425,725	454,121	484,411	516,721
<b>Materials and services</b>	623,595	642,303	661,572	681,419	701,862
<b>Capital outlay</b>	51,205	53,509	55,917	58,433	61,063
<b>Transfers</b>	281,504	293,046	305,061	317,568	330,588
<b>Less: Existing User Fees</b>	(70,000)	(72,100)	(74,263)	(76,491)	(78,786)
<b>Total expenditures</b>	<u>\$ 2,226,001</u>	<u>\$ 2,320,699</u>	<u>\$ 2,419,753</u>	<u>\$ 2,523,379</u>	<u>\$ 2,631,809</u>

## C. CAPITAL FUNDING PLAN

The adopted Tigard parks and trails capital improvement plan includes \$13 million in total costs in the 7-year projection period (**Appendix E2**). Costs represented in this plan are based on inflated dollars to the year of construction. Representative projects include:

- ◆ **Fanno Creek Remeander:** A \$1,147,000 project intended to reduce erosion impacts by lengthening the channel and decreasing the slope of the stream bed. This project will also require the realignment of a portion of the Fanno Creek Regional Trail.
- ◆ **Dirksen Nature Park:** A \$3.8 million project which will maintain 35 acres of natural area while also renovating an existing educational building on the site as well as improving trail connections throughout the property, among other improvements.
- ◆ **Tree Canopy Replacement Program:** A \$600,000 project which intends to replace lost tree canopy along stream corridors, school grounds, highways, and other areas.

- ◆ **Park Land Acquisition:** A \$890,000 dollar effort to identify and purchase park land with funds coming from Tigard's citizen approved parks bond.
- ◆ **Downtown Land Acquisition:** A \$1.3 million effort to identify and purchase park land exclusively within downtown Tigard with funds coming from Tigard's citizen approved parks bond.
- ◆ **Tigard Street Trail and Public Space:** An \$45,000 trail project which is intended to connect SW Tiedeman Avenue to downtown Tigard and Tigard Transit Center by converting a disused rail spur.
- ◆ **Damaged Tree Replacement Program:** A \$300,000 effort to increase the quality and quantity of large trees and tree canopy.
- ◆ **Fanno Creek Trail Connection:** A \$4.8 million project which intends to close numerous gaps on the Fanno Creek Regional Trail present within the city of Tigard.

The capital funding strategy envisions funding these projects through a mix of available cash balances including grants, System Development Charges, and transfers from other funds.

## D. SUMMARY OF REVENUE REQUIREMENT

The operating forecast components of operations and maintenance (O&M) expenses, debt service, and system reinvestment come together to form the multi-year revenue requirement. The revenue requirement compares the overall revenue available to the parks system to the expenses and evaluates the sufficiency of rates on an annual basis.

Seven scenarios were developed to evaluate the potential for Tigard's parks utility fee to support various revenue requirements:

### D.1 Scenario 1: Funding Parks at Existing Levels

**Appendix A1** displays the results of the revenue requirement analysis of scenario 1. In this scenario, the parks utility fee assumes the parks costs which in the past were paid for using general fund transfers. This scenario assumes that no increase in parks funding occurs, meaning that deferral in needed maintenance continues and no funding is added to expand recreational programs or add capital projects as part of the PMF. Revenue requirements gradually and steadily increase as residential and employment growth increase. The revenue requirement for scenario 1 increases from \$2,226,001 in FY 2016-17 to \$3,254,938 in FY 2025-26.

As noted previously, the PMF analysis includes a sensitivity analysis removing the recreation expenditures from the overall budget. In FY 2016, the recreation spending is \$177,410. Hence, if recreation expenses are not included in the PMF revenue requirement, the annual revenue requirement for scenario 1 would be lower by approximately \$180,000 dollars.

### D.2 Scenario 2: Funding Deferred Maintenance

**Appendix A2** displays the results of the revenue requirement analysis of scenario 2. In this scenario, the parks utility fee pays for deferred maintenance costs. This includes equipment and vehicle repair and replacement, repairs to trails, and other maintenance activities. The revenue requirement associated with scenario 2 fluctuates annually based upon the replacement timeline for assets. The initial year of the revenue requirement also addresses previously deferred maintenance whereas the following years address deferred maintenance requirements in that specific year. The revenue requirement for scenario 2 ranges from a high of \$1,179,539 in FY 2016-17 to a low of \$244,343 in FY 2025-26.

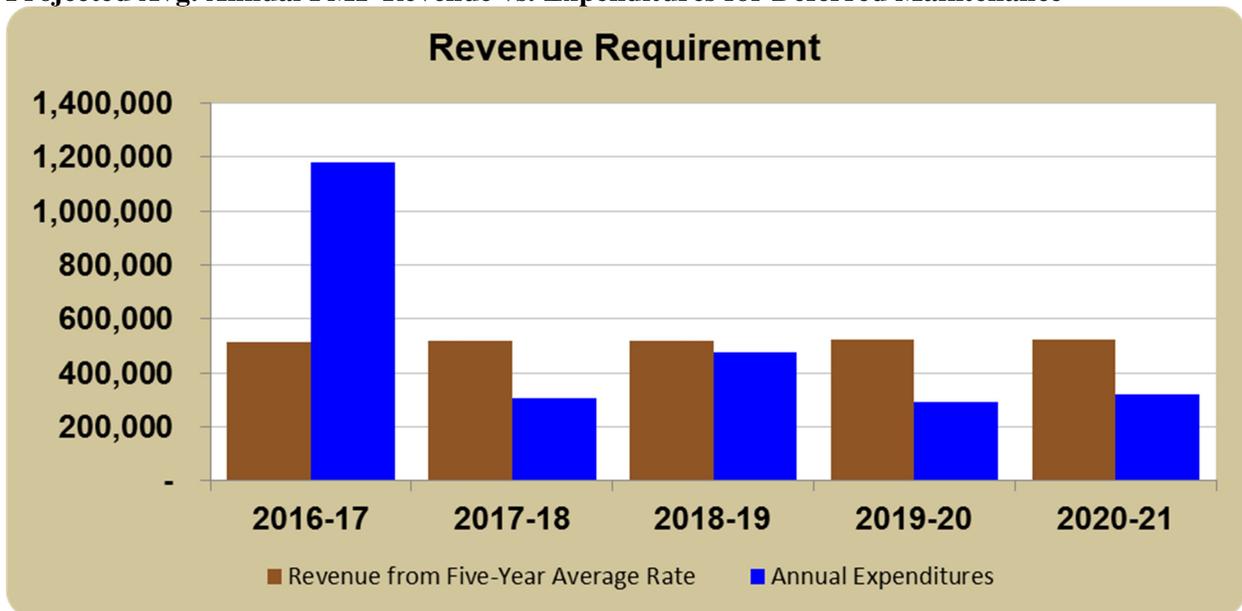
Cost estimates for this scenario can be found in **Appendix D1** while further detail regarding the cost assumptions associated with this revenue requirement can be found in **Appendix E1**.

As shown in the following Exhibit, expenditures in this scenario are highly variable. To correctly account for expenditures in the utility rate and ensure low rate volatility, it is recommended that the city utilize a five-year average PMF rate. The annual revenue compared to annual expenditures for this scenario is shown in **Exhibit 3.2**. Since this approach will likely result in 1 or 2 years with inadequate fund balances to cover planned deferred maintenance, the city may need to transfer (borrow) funds from other city funds to cover temporary imbalances until reserves build up over time.

The five-year (smoothed) revenue requirement for scenario 2 would result in an initial revenue requirement of approximately \$514,000, as noted in **Appendix A2-B**, which is also part of the recommended PMF rate scenario.

**Exhibit 3.2:**

**Projected Avg. Annual PMF Revenue vs. Expenditures for Deferred Maintenance**



**D.3 Scenario 3: Fully Funding CIP**

**Appendix A3** displays the results of the revenue requirement analysis of scenario 3. In this scenario, the parks utility fee pays for the costs of all CIP-related transfers from the Urban Forestry Fund and transfers from the Transportation CIP Fund which are currently expected to fund capital projects. This scenario would reduce parks-related transfers from city accounts while identifying financing necessary to complete anticipated CIP projects (**Appendix E2**). This would also ensure such projects were funded with guaranteed funds rather than assuming funds from SDCs or other sources will be available. The revenue requirement fluctuates through the first five years and then gradually increases over the last five years. This fluctuation is due to the CIP calling for uneven expenses year to year since its costs are associated with the purchase and construction of facilities.

The revenue requirement for scenario 3 begins at \$857,500 in FY 2016-17, fluctuates in the next four years from \$0 to \$1,174,500, and then averages around \$600,000 in the last five years. An annual cost breakdown of this scenario can be found in **Appendix D2** while further detail regarding the cost assumptions associated with this revenue requirement can be found in **Appendix E2**.

## D.4 Scenario 4: Develop Current Lands

**Appendix A4** displays the results of the revenue requirement analysis of scenario 4. In this scenario, the parks utility fee pays for the capital and O&M costs associated with the development of new park land purchased using Tigard's voter approved parks bond. This would allow the city to build parks quicker with more stable funding sources than is currently possible. This scenario's revenue requirement increases over the 10-year planning horizon with costs growing at a faster rate each fiscal year. This is due to rapidly increasing operations and maintenance costs associated with bringing additional facilities on-line. The revenue requirement for scenario 4 increases from \$203,624 in FY 2016-17 to \$452,008 in FY 2025-26. An annual cost breakdown of this scenario can be found in **Appendix D3** while further detail regarding the cost assumptions associated with this revenue requirement can be found in **Appendix E3**.

## D.5 Scenario 5: Develop New Lands

**Appendix A5** displays the results of the revenue requirement analysis of scenario 4. In this scenario, the parks utility fee pays for the currently budgeted parks expenditures and adds the cost of the purchase, development, and O&M of new park land which has not yet been acquired through Tigard's voter approved parks bond. This would allow the city to expand their parks inventory, continuing to build in anticipation of a growing population and employment base. The revenue requirement for scenario 5 increases steadily as operations and maintenance expenses associated with opening new facilities grow. The revenue requirement for scenario 5 increases from \$84,687 in FY 2016-17 to \$486,452 in FY 2025-26. An annual cost breakdown of this scenario can be found in **Appendix D4** while further detail regarding the cost assumptions associated with this revenue requirement can be found in **Appendix E3**.

## D.6 Scenario 6: Funding New Recreational Programs

**Appendix A6** displays the results of the revenue requirement analysis of scenario 6. In this scenario, the parks utility fee pays for the cost of implementing programs identified as council priorities. Among those activities, scenario 6 assumes that one full time recreation employee will be hired in FY 2016-17 and another will be hired in FY 2018-19. Additionally, a recreation guide will be published and made available along with the implementation of an online reservation system for park facility rental. It is anticipated that the reservation system and recreation guide will generate additional revenue for the parks department in the form of participation fees, user fees, and rental fees. Finally, the city will also provide grants and scholarships so that low-income citizens can participate in the newly realized activities. The revenue requirement for this scenario increases steadily from \$153,076 in FY 2016-17 to \$617,733 in FY 2020-21 then, averages \$420,000 in the final five years. An annual cost breakdown of this scenario can be found in **Appendix D5**.

## D.7 Scenario 7: Funding Special Community Assets

**Appendix A7** displays the results of the revenue requirement analysis of scenario 7. In this scenario, the parks utility fee pays for the cost of implementing an arts and culture program through which the city of Tigard would purchase and display artwork throughout the city. In addition, scenario 7 would fund the construction of stormwater facilities in city parks. The revenue requirement for scenario 7 increases along with employment and residential growth because the programs funded by this scenario do not fluctuate in cost based on the year being considered. The revenue requirement increases from \$201,627 in FY 2016-17 to \$248,192 in FY 2025-26. An annual cost breakdown of this scenario can be found in **Appendix D6** while further detail regarding the cost assumptions associated with this revenue requirement can be found in **Appendix E4**.

## SECTION IV: RATE DESIGN

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### A. INTRODUCTION

The principal objective of the rate design stage is to develop parks utility rate structures that collect the appropriate level of revenue. The City currently does not assess local charges for parks utility service. In order to fund the activities identified in the revenue requirement section above, it is recommended that a local charge be formed.

### B. PARKS UTILITY FUNDING

The existing parks funding mechanisms in Tigard are grouped into two purposes: those funds dedicated to capital purchases and those funds dedicated to maintenance for parks. Capital funds have historically come from SDC revenues, transfers from capital funds and grants. Meanwhile, the majority of operations expenses have come from transfers from the city's general fund.

### C. CUSTOMER CHARGES

#### **Equivalent Dwelling Units**

Equivalent Dwelling Units (EDUs) are the basis for allocating annual PARC revenue requirements to customer groups. EDUs, by definition, equate to a one unit of customer demand (usage) of parks and recreation investment within the City of Tigard, whereas one unit is equivalent to the amount of parks and recreation investment needed to support one single family residential dwelling unit.

The methodology for determining EDUs takes into account most current (FY 2015-16) customer data that is maintained and updated periodically by the city as part of its street maintenance fee program. Supplemental data depicting building occupancy (using COSTAR quarterly reports for the Tigard subarea), employment (using confidential Oregon Employment Department data and local business interviews), and dwelling units (using city staff estimates) is compiled using sources noted in **the table below**.

Non-residential EDU conversion factors are derived from the adopted Tigard Parks and Trails SDC Methodology Report (adopted in 2015), with an EDU conversion factor that equates 1 dwelling unit to 15 jobs. Hence, the PMF methodology estimates employment for each commercial and industrial customer and divides it by 15 to calculate non-residential EDUs.

Single family residential EDUs are calculated for each customer using the following formula:

$$\text{Customer Accounts} \times 0.992 \text{ Occupancy Rate} = \text{EDUs}$$

Multifamily residential EDUs are calculated for each customer using the following formula:

$$\mathbf{Dwelling\ Units} \times \mathbf{.942\ Occupancy\ Rate} = \mathbf{EDUs}$$

Commercial EDUs are calculated using the following formula:

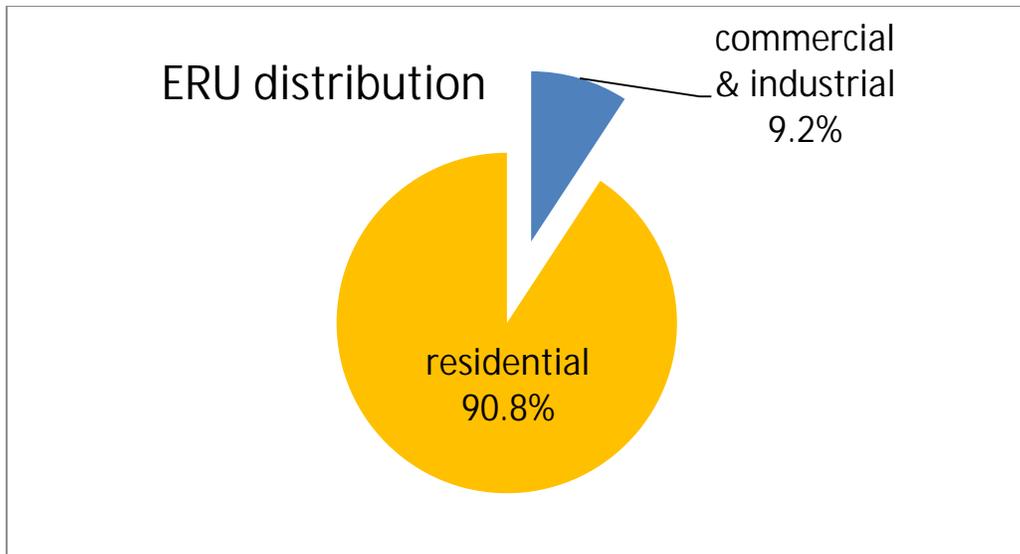
$$\frac{[\mathbf{Parking\ Stalls} \times \mathbf{0.76\ Jobs\ Per\ Stall} \times \mathbf{.995\ Occupancy\ Rate}]}{\mathbf{15\ (EDU\ factor)}} = \mathbf{EDUs}$$

Industrial EDUs are calculated using the following formula:

$$\frac{[\mathbf{Parking\ Stalls} \times \mathbf{1.19\ Jobs\ Per\ Stall} \times \mathbf{1.0\ Occupancy\ Rate}]}{\mathbf{15\ (EDU\ factor)}} = \mathbf{EDUs}$$

As indicated in the **Exhibit 4.1**, the resulting distribution of EDUs, when combined by general customer type equates to a distribution of 90.8% to residential customers and 9.2% to non-residential (commercial and industrial) customers.

Exhibit 4.1: Distribution of Citywide EDUs



An annual EDU growth factor of 0.45% is assumed based on historic customer growth trends in Tigard’s customer utility accounts. A summary of EDU calculations and projections can be found in **Appendix B**.

### Customer Charges

The City shall charge each customer within the City of Tigard based on actual customer account information which is updated annually. Any occupied residential dwelling, multifamily and commercial or industrial customer is to be charged as follows:

**Occupied single family** residential PMF rates are calculated for each customer using the following formula:

$$\mathbf{Dwelling\ Unit} \times \mathbf{monthly\ PMFRate\ per\ EDU} = \mathbf{Monthly\ charge}$$

**Occupied multifamily** customer PARC rates are calculated using the following formula:

$$\text{Dwelling Units} \times \text{monthly PMF Rate per EDU} = \text{Monthly charge}$$

**Occupied commercial** customer PARC rates are calculated using the following formula:

$$\frac{[\text{Parking Stalls} \times 0.76 \text{ Jobs Per Stall}]}{15 \text{ (EDU factor)}} \times \text{monthly PMF per EDU} = \text{Monthly charge}$$

**Occupied industrial** customer PARC rates are calculated using the following formula:

$$\frac{[\text{Parking Stalls} \times 1.19 \text{ Jobs Per Stall}]}{15 \text{ (EDU factor)}} \times \text{monthly PMF per EDU} = \text{Monthly charge}$$

## D. PARKS UTILITY FEE SCENARIOS ANALYSIS

Each of the scenarios and their associated revenue requirement were analyzed to determine potential utility fees for the citizens and businesses of Tigard. An analysis of each scenario resulted in draft PMF rate calculations that were summarized and presented to the City at a Tigard City Council Work Session. The results of each scenario are shown in their respective appendices.

**Exhibit 4.2: Parks Utility Fee Scenarios**

Scenario Comparison	Annual Revenue per EDU FY 2016-17 (Year 1)	Initial Five Year Rate <sup>1</sup>	Equivalent Property Tax	
			Annual Mil rate, FY 2016-17	Annual Avg. Cost on \$240k home
1. Adopted Budget	<b>\$98.17</b>	<b>\$8.18</b>	<b>0.4056</b>	<b>\$97.35</b>
2. Deferred Maintenance	<b>\$22.69</b>	<b>\$1.89</b>	<b>0.2149</b>	<b>\$51.59</b>
3. Fully Fund CIP Projects	\$37.82	\$1.94	0.1563	\$37.50
4. Develop and Operate Current Lands	\$8.98	\$0.92	0.0371	\$8.91
5. Develop and Operate New Lands	\$3.73	\$0.59	0.0154	\$3.70
6. Develop Recreation Programs	\$6.75	\$1.39	0.0279	\$6.69
7. Special Community Assets	\$8.89	\$0.79	0.0367	\$8.82
<b>Total</b>	<b>\$187.03</b>	<b>\$15.70</b>	<b>0.8940</b>	<b>\$214.56</b>

\*Residential and Non-Residential EDUs are Charged the same amount per EDU.

<sup>1</sup>Note that five year rate may cause a revenue deficiency in the first years, if expenditures in early years are higher than later years.

\*\* Total Assessed Value in City of Tigard: \$5,838,019,224

\*\* Average Home Assessed Value:: \$240,000

\*\* Average annual collection factor: 94%

Source: Compiled by FCS GROUP.

## D. RECOMMENDED RATE SCENARIO

The recommended initial PMF rate is intended to address the current budgeted funding requirements for parks and deferred parks maintenance costs. Using the detailed assumptions provided in the Appendix, the annual revenue requirement over the next five years (FY 2016-17 to FY 2020-21) is projected to include \$2,226,001 in parks budget and \$514,457 in deferred maintenance for a total initial year revenue requirement of \$2,720,458.

In order to smooth out the PMF rates, it is recommended that the initial fee be based on the projected parks budget and the five year average revenue requirement for deferred maintenance. The resulting figure will be allocated among the customer groups. It is further recommended that the annual escalation rate be applied starting in year two. An annual escalation of 4.26% is recommended using the assumptions shown in **Exhibit 4.3**.

**Exhibit 4.3: PMF Escalation Rates**

Parks Utility Rate Indices Years 1-5		
Year of Implementation	Annual Rate	Weights
Personnel	4.80%	0.6
Services/Utilities	3.00%	0.25
Materials/Internal Services	4.20%	0.15
<b>Weighted Average</b>	<b>4.26%</b>	

Source: City of Tigard and FCS GROUP; based on estimated expenditures.

The resulting Tigard PMF rates are shown below in **Exhibit 4.4**. Initial monthly PMF rates would be \$10.07 per customer, and increase by approximately 4 percent annually. This charge should be sufficient to generate an annual average revenue amount of \$2,740,458 in FY 2016-17 and \$3,239,691 in FY 2020-21.

Exhibit 4.4: Tigard PMF Rates for Recommended Scenario: Parks Budget plus Deferred Maintenance

Average Revenue Requirement with 5-Year Smoothing of Deferred Maintenance	Fiscal Year 2016-17	Fiscal Year 2017-18	Fiscal Year 2018-19	Fiscal Year 2019-20	Fiscal Year 2020-21
<b>Parks Budget</b>	\$ 2,226,001	\$ 2,320,699	\$ 2,419,753	\$ 2,523,379	\$ 2,631,809
<b>Deferred Maintenance*</b>	\$ 514,457	\$ 536,372	\$ 559,222	\$ 583,045	\$ 607,883
<b>Total expenditures</b>	<b>\$ 2,740,458</b>	<b>\$ 2,857,072</b>	<b>\$ 2,978,975</b>	<b>\$ 3,106,424</b>	<b>\$ 3,239,691</b>
<b>Allocated costs</b>					
<b>Residential allocation</b>	\$ 2,487,186	\$ 2,593,022	\$ 2,703,659	\$ 2,819,330	\$ 2,940,280
<b>Non-residential allocation</b>	253,272	264,049	275,316	287,094	299,411
<b>Total expenditures</b>	<b>\$ 2,740,458</b>	<b>\$ 2,857,072</b>	<b>\$ 2,978,975</b>	<b>\$ 3,106,424</b>	<b>\$ 3,239,691</b>
<b>EDUs: 5-Year Projections</b>					
<b>Residential</b>	20,579	20,672	20,765	20,858	20,952
<b>Non-Residential</b>	2,096	2,105	2,114	2,124	2,134
<b>Total</b>	<b>22,675</b>	<b>22,777</b>	<b>22,879</b>	<b>22,982</b>	<b>23,086</b>
<b>Rate Calculation: 5-Year Projections (nominal dollars)</b>					
<b>Required annual revenue per EDU</b>					
<b>Residential</b>	\$ 120.86	\$ 125.44	\$ 130.20	\$ 135.17	\$ 140.33
<b>Non-residential</b>	\$ 120.86	\$ 125.44	\$ 130.20	\$ 135.17	\$ 140.33
<b>Monthly rate per EDU</b>					
<b>Residential</b>	<b>\$ 10.07</b>	<b>\$ 10.45</b>	<b>\$ 10.85</b>	<b>\$ 11.26</b>	<b>\$ 11.69</b>
<b>Non-residential</b>	<b>\$ 10.07</b>	<b>\$ 10.45</b>	<b>\$ 10.85</b>	<b>\$ 11.26</b>	<b>\$ 11.69</b>

\* assumes escalation rate of 4.26% on deferred maintenance avg. revenue requirement.

In the sensitivity analysis, the PMF is adjusted downwards to reflect a policy that the fee be used exclusively for parks maintenance only. In this scenario, the annual revenue requirement is reduced by \$184,563 to exclude the annual amount of funds currently expended on recreation facilities and programs. This results in a 74 cent per month per EDU reduction. Hence, the initial PMF would be \$9.33 instead of \$10.07, and subsequent year rates would comport with such a reduction in charges.

## SECTION V: RATE POLICIES

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Parks revenues at current levels are not sufficient to fund ongoing maintenance needs, much less identified parks priorities and the development of parks on city-owned land. Seven scenarios were evaluated for the parks system based on services and activities that Tigard has identified as priorities for the parks department.

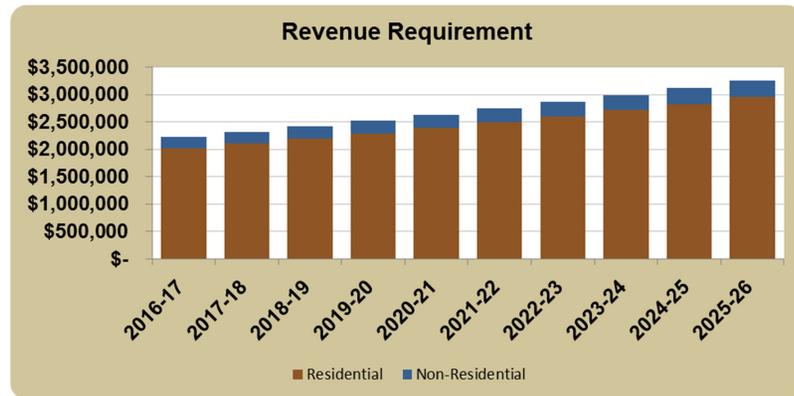
Recommendations of this study include:

- ◆ The recommended initial PMF rate would be set at a level to fund the existing annual parks budget and identified deferred parks maintenance.
- ◆ The Parks Fund should establish a minimum operating reserve that equates to 90-days of expenditures.
- ◆ The City should provide a rate policy that establishes an annual reserve for low income assistance. Based on experience by the City of Tigard with its water rates, an initial annual reserve fund balance of \$25,000 should be established. The city would utilize this fund to provide assistance to individuals and families within the City of Tigard if they meet the certain income parameters. Eligibility is to be determined by St. Vincent de Paul (city partner) using the U.S. Department of Housing and Urban Development income criteria for utility assistance. Once this fund is established, a share of each year's PMF revenue should be transferred into it to maintain a minimum beginning year fund balance of \$25,000.
- ◆ As the City considers acquiring or developing new land for future parks, it shall consider potential impacts on PMF expenditures and revenue requirements, and accordingly make annual adjustments to the PMF rates.
- ◆ The City should adopt a rate policy that establishes an annual escalation rate based on city cost experience or at an annual rate of at least 4 percent.
- ◆ The City shall revisit the study findings during the budget cycle to check that the assumptions used are still appropriate and that no significant changes have occurred that would alter the results of the rate methodology. The City should continue to monitor the financial status of the parks utility, adjusting the parks utility fee rate strategy as needed.

# TECHNICAL APPENDIX

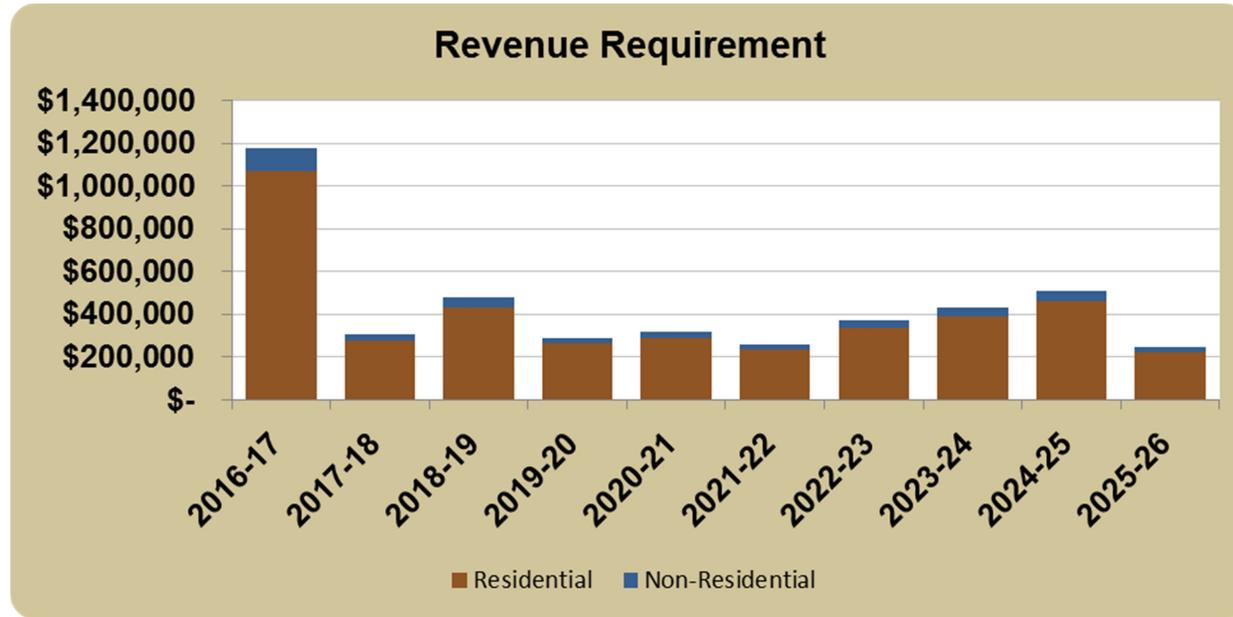
## APPENDIX A: REVENUE REQUIREMENTS

### Appendix A1: Scenario 1 (Adopted Budget) Revenue Requirement



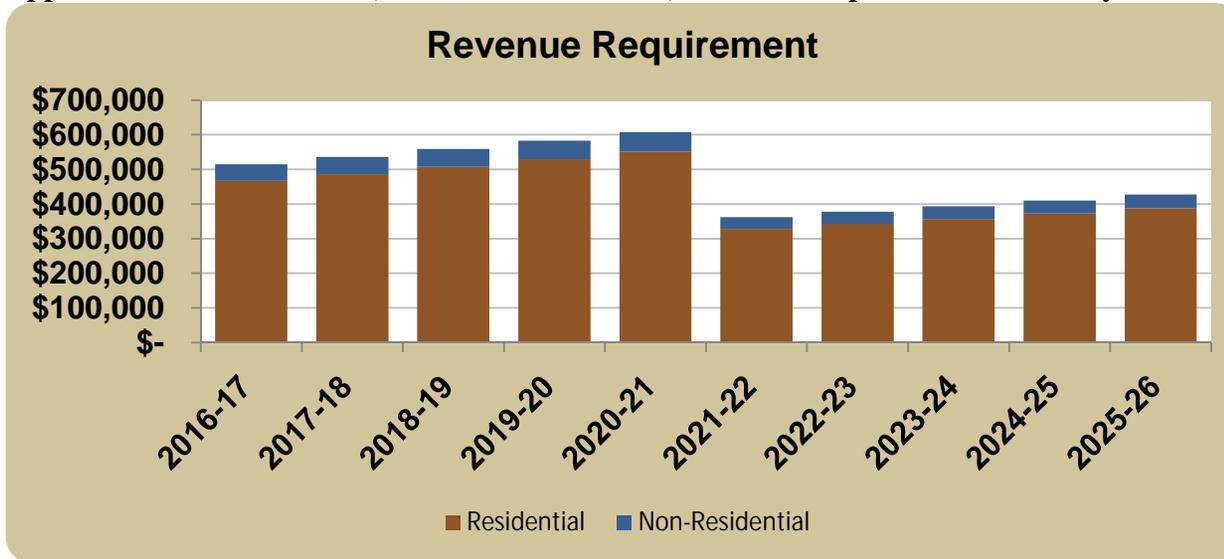
Revenue Requirement: 10-Year Projections	Fiscal Year 2016-17	Fiscal Year 2017-18	Fiscal Year 2018-19	Fiscal Year 2019-20	Fiscal Year 2020-21	Fiscal Year 2021-22	Fiscal Year 2022-23	Fiscal Year 2023-24	Fiscal Year 2024-25	Fiscal Year 2025-26
<b>Adjusted cost scenario:</b>										
Adopted Budget	\$ 2,226,001	\$ 2,320,699	\$ 2,419,753	\$ 2,523,379	\$ 2,631,809	\$ 2,745,283	\$ 2,864,056	\$ 2,988,398	\$ 3,118,592	\$ 3,254,938
Manual adjustments	-	-	-	-	-	-	-	-	-	-
<b>Total expenditures</b>	<b>\$ 2,226,001</b>	<b>\$ 2,320,699</b>	<b>\$ 2,419,753</b>	<b>\$ 2,523,379</b>	<b>\$ 2,631,809</b>	<b>\$ 2,745,283</b>	<b>\$ 2,864,056</b>	<b>\$ 2,988,398</b>	<b>\$ 3,118,592</b>	<b>\$ 3,254,938</b>
<b>Allocated costs</b>										
Residential allocation	\$ 2,020,275	\$ 2,106,221	\$ 2,196,120	\$ 2,290,170	\$ 2,388,578	\$ 2,491,565	\$ 2,599,361	\$ 2,712,212	\$ 2,830,373	\$ 2,954,118
Non-residential allocation	205,726	214,478	223,632	233,210	243,231	253,718	264,695	276,186	288,219	300,820
<b>Total expenditures</b>	<b>\$ 2,226,001</b>	<b>\$ 2,320,699</b>	<b>\$ 2,419,753</b>	<b>\$ 2,523,379</b>	<b>\$ 2,631,809</b>	<b>\$ 2,745,283</b>	<b>\$ 2,864,056</b>	<b>\$ 2,988,398</b>	<b>\$ 3,118,592</b>	<b>\$ 3,254,938</b>

**Appendix A2-A: Scenario 2 (Deferred Maintenance) Revenue Requirement**



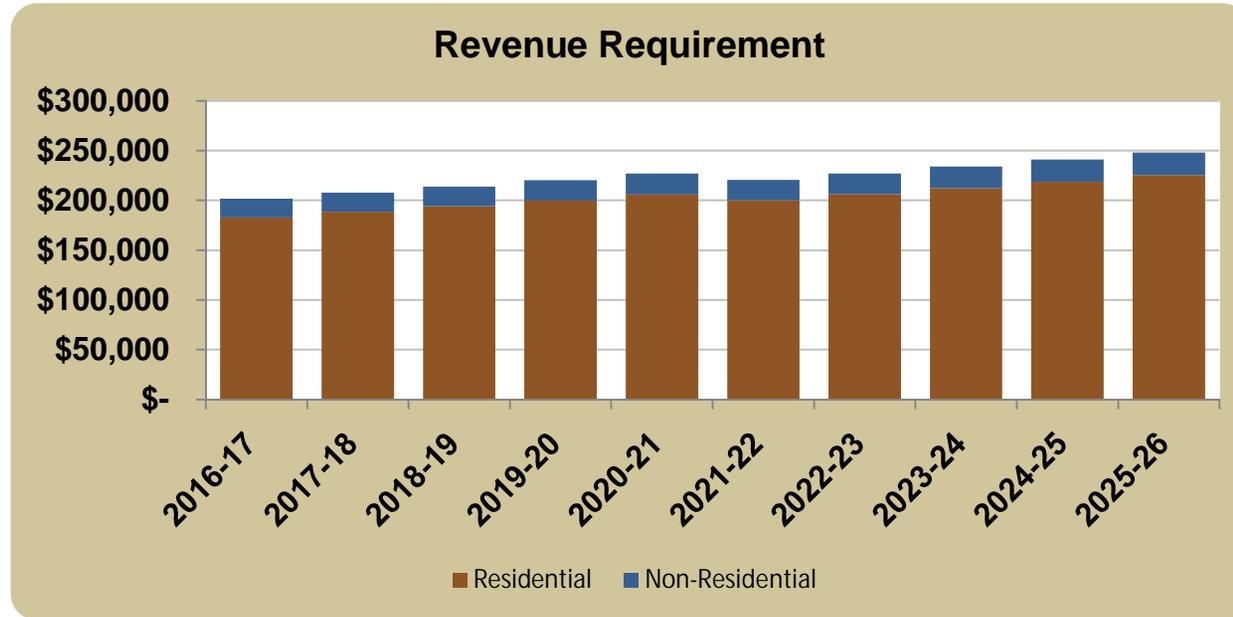
<b>Revenue Requirement: 10-Year Projections</b>	<b>Fiscal Year 2016-17</b>	<b>Fiscal Year 2017-18</b>	<b>Fiscal Year 2018-19</b>	<b>Fiscal Year 2019-20</b>	<b>Fiscal Year 2020-21</b>	<b>Fiscal Year 2021-22</b>	<b>Fiscal Year 2022-23</b>	<b>Fiscal Year 2023-24</b>	<b>Fiscal Year 2024-25</b>	<b>Fiscal Year 2025-26</b>
<b>Adjusted cost scenario:</b>										
Deferred Maintenance	\$ 1,179,539	\$ 306,463	\$ 476,641	\$ 290,388	\$ 319,251	\$ 255,309	\$ 370,340	\$ 431,111	\$ 508,687	\$ 244,343
Manual adjustments	-	-	-	-	-	-	-	-	-	-
<b>Total expenditures</b>	<b>\$ 1,179,539</b>	<b>\$ 306,463</b>	<b>\$ 476,641</b>	<b>\$ 290,388</b>	<b>\$ 319,251</b>	<b>\$ 255,309</b>	<b>\$ 370,340</b>	<b>\$ 431,111</b>	<b>\$ 508,687</b>	<b>\$ 244,343</b>
<b>Allocated costs</b>										
Residential allocation	\$ 1,070,527	\$ 278,140	\$ 432,590	\$ 263,551	\$ 289,746	\$ 231,714	\$ 336,113	\$ 391,268	\$ 461,675	\$ 221,761
Non-residential allocation	109,013	28,323	44,051	26,838	29,505	23,596	34,227	39,843	47,013	22,582
<b>Total expenditures</b>	<b>\$ 1,179,539</b>	<b>\$ 306,463</b>	<b>\$ 476,641</b>	<b>\$ 290,388</b>	<b>\$ 319,251</b>	<b>\$ 255,309</b>	<b>\$ 370,340</b>	<b>\$ 431,111</b>	<b>\$ 508,687</b>	<b>\$ 244,343</b>

**Appendix A2-B: Scenario 2 (Deferred Maintenance) Revenue Requirement with five year smoothing**



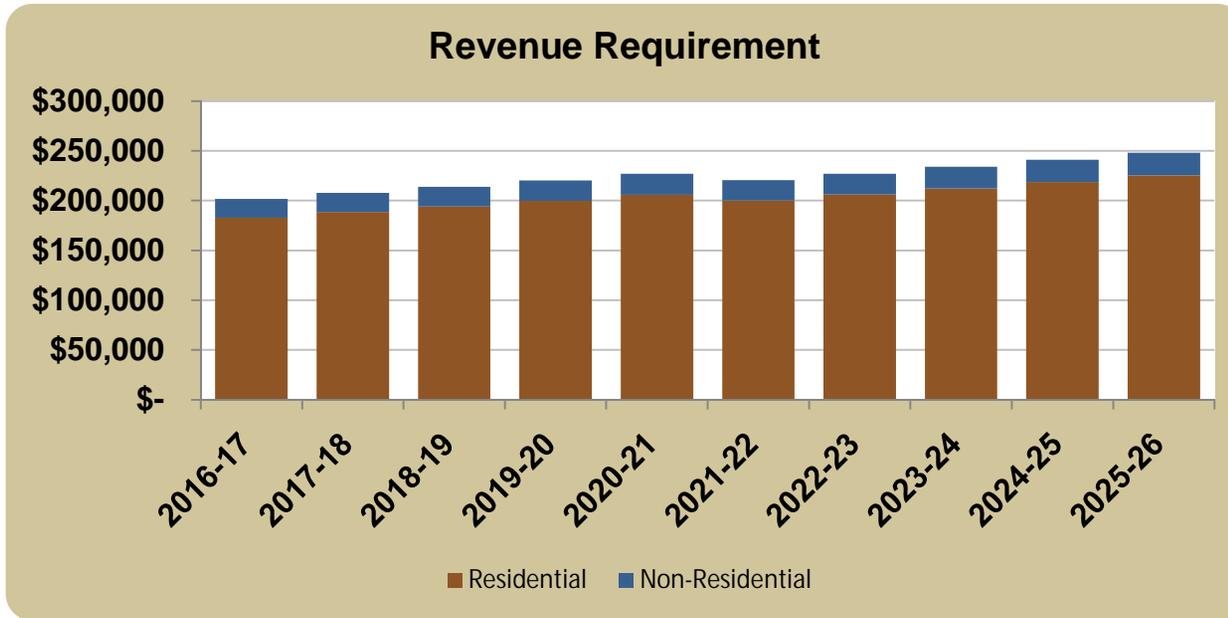
<b>Revenue Requirement: 10-Year Projections</b>	Fiscal Year 2016-17	Fiscal Year 2017-18	Fiscal Year 2018-19	Fiscal Year 2019-20	Fiscal Year 2020-21	Fiscal Year 2021-22	Fiscal Year 2022-23	Fiscal Year 2023-24	Fiscal Year 2024-25	Fiscal Year 2025-26
<b>Adjusted cost scenario:</b>										
Deferred Maintenance	\$ 514,457	\$ 536,372	\$ 559,222	\$ 583,045	\$ 607,883	\$ 361,958	\$ 377,378	\$ 393,454	\$ 410,215	\$ 427,690
Manual adjustments	-	-	-	-	-	-	-	-	-	-
<b>Total expenditures</b>	<b>\$ 514,457</b>	<b>\$ 536,372</b>	<b>\$ 559,222</b>	<b>\$ 583,045</b>	<b>\$ 607,883</b>	<b>\$ 361,958</b>	<b>\$ 377,378</b>	<b>\$ 393,454</b>	<b>\$ 410,215</b>	<b>\$ 427,690</b>
<b>Allocated costs</b>										
Residential allocation	\$ 466,911	\$ 486,801	\$ 507,539	\$ 529,160	\$ 551,702	\$ 328,506	\$ 342,500	\$ 357,091	\$ 372,303	\$ 388,163
Non-residential allocation	47,546	49,571	51,683	53,885	56,180	33,452	34,877	36,363	37,912	39,527
<b>Total expenditures</b>	<b>\$ 514,457</b>	<b>\$ 536,372</b>	<b>\$ 559,222</b>	<b>\$ 583,045</b>	<b>\$ 607,883</b>	<b>\$ 361,958</b>	<b>\$ 377,378</b>	<b>\$ 393,454</b>	<b>\$ 410,215</b>	<b>\$ 427,690</b>

**Appendix A3: Scenario 3 (Fully Fund CIP Projects) Revenue Requirement**



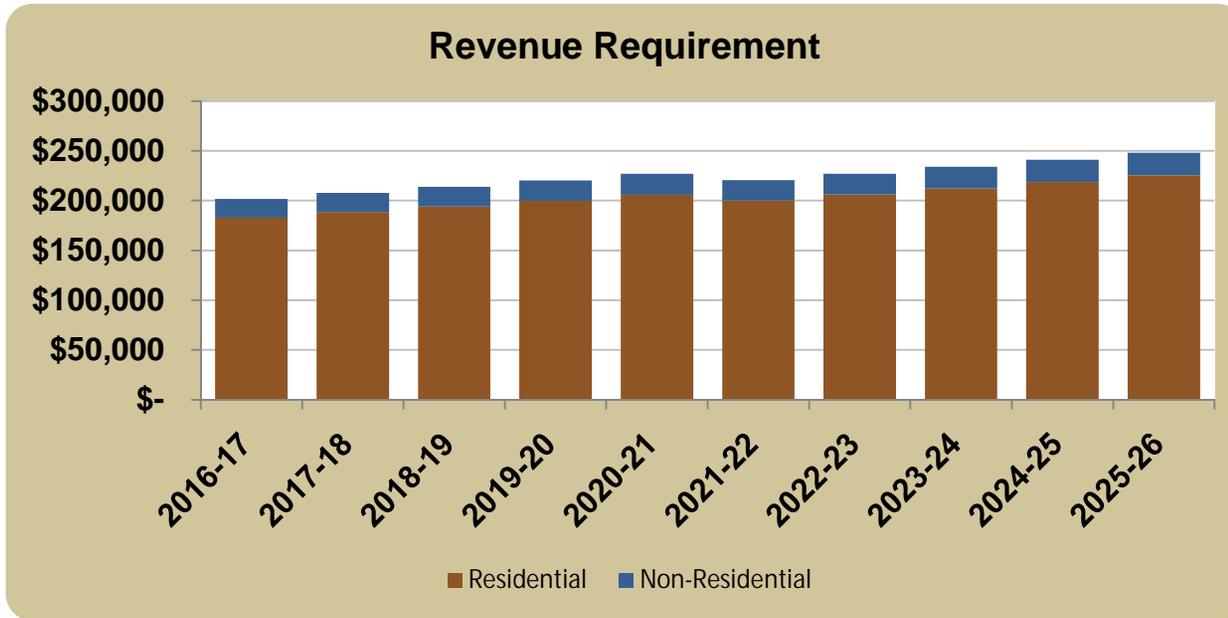
<b>Revenue Requirement: 10-Year Projections</b>	<b>Fiscal Year 2016-17</b>	<b>Fiscal Year 2017-18</b>	<b>Fiscal Year 2018-19</b>	<b>Fiscal Year 2019-20</b>	<b>Fiscal Year 2020-21</b>	<b>Fiscal Year 2021-22</b>	<b>Fiscal Year 2022-23</b>	<b>Fiscal Year 2023-24</b>	<b>Fiscal Year 2024-25</b>	<b>Fiscal Year 2025-26</b>
<b>Adjusted cost scenario:</b>										
Fully Fund CIP Projects	\$ 857,500	\$ 604,150	\$ 1,174,500	\$ -	\$ -	\$ 550,955	\$ 575,748	\$ 601,657	\$ 628,732	\$ 657,025
Manual adjustments	-	-	-	-	-	-	-	-	-	-
<b>Total expenditures</b>	<b>\$ 857,500</b>	<b>\$ 604,150</b>	<b>\$ 1,174,500</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 550,955</b>	<b>\$ 575,748</b>	<b>\$ 601,657</b>	<b>\$ 628,732</b>	<b>\$ 657,025</b>
<b>Allocated costs</b>										
Residential allocation	\$ 778,250	\$ 548,315	\$ 1,065,953	\$ -	\$ -	\$ 500,036	\$ 522,538	\$ 546,052	\$ 570,624	\$ 596,303
Non-residential allocation	79,250	55,835	108,547	-	-	50,919	53,210	55,605	58,107	60,722
<b>Total expenditures</b>	<b>\$ 857,500</b>	<b>\$ 604,150</b>	<b>\$ 1,174,500</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 550,955</b>	<b>\$ 575,748</b>	<b>\$ 601,657</b>	<b>\$ 628,732</b>	<b>\$ 657,025</b>

**Appendix A4: Scenario 4 (Develop Current Land) Revenue Requirement**



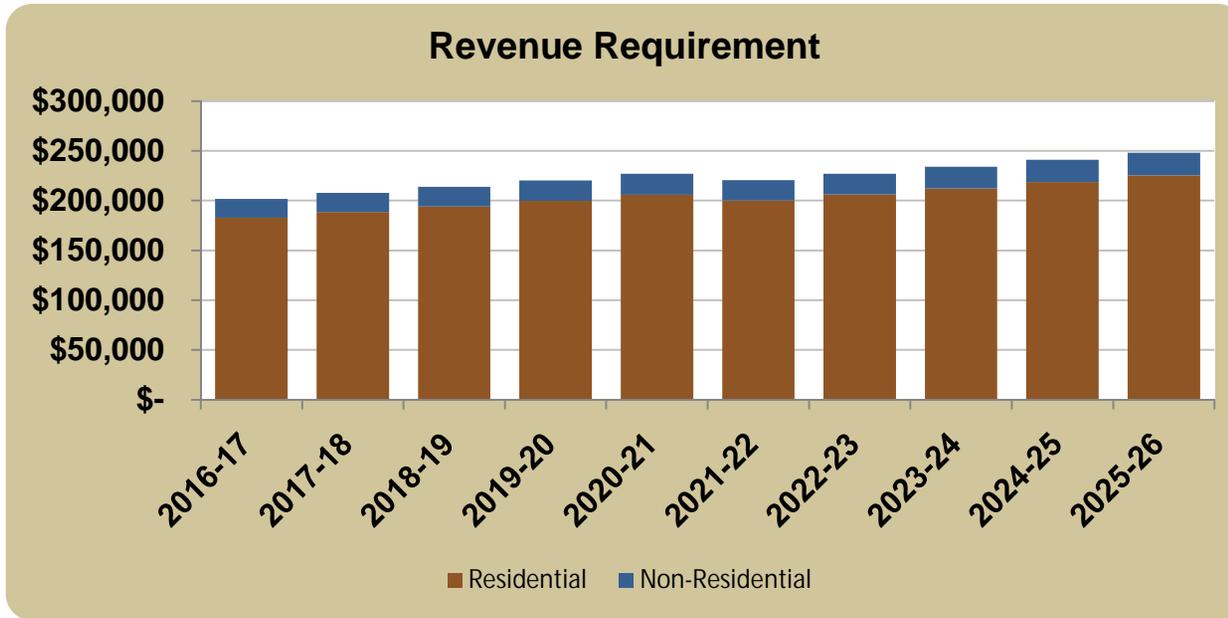
<b>Revenue Requirement: 10-Year Projections</b>	<b>Fiscal Year 2016-17</b>	<b>Fiscal Year 2017-18</b>	<b>Fiscal Year 2018-19</b>	<b>Fiscal Year 2019-20</b>	<b>Fiscal Year 2020-21</b>	<b>Fiscal Year 2021-22</b>	<b>Fiscal Year 2022-23</b>	<b>Fiscal Year 2023-24</b>	<b>Fiscal Year 2024-25</b>	<b>Fiscal Year 2025-26</b>
<b>Adjusted cost scenario:</b>										
Develop Current Land	\$ 203,624	\$ 225,903	\$ 249,379	\$ 274,105	\$ 300,136	\$ 327,532	\$ 356,353	\$ 386,662	\$ 418,524	\$ 452,008
Manual adjustments	-	-	-	-	-	-	-	-	-	-
<b>Total expenditures</b>	<b>\$ 203,624</b>	<b>\$ 225,903</b>	<b>\$ 249,379</b>	<b>\$ 274,105</b>	<b>\$ 300,136</b>	<b>\$ 327,532</b>	<b>\$ 356,353</b>	<b>\$ 386,662</b>	<b>\$ 418,524</b>	<b>\$ 452,008</b>
<b>Allocated costs</b>										
Residential allocation	\$ 184,805	\$ 205,025	\$ 226,331	\$ 248,772	\$ 272,398	\$ 297,262	\$ 323,419	\$ 350,927	\$ 379,844	\$ 410,234
Non-residential allocation	18,819	20,878	23,047	25,333	27,738	30,270	32,934	35,735	38,680	41,774
<b>Total expenditures</b>	<b>\$ 203,624</b>	<b>\$ 225,903</b>	<b>\$ 249,379</b>	<b>\$ 274,105</b>	<b>\$ 300,136</b>	<b>\$ 327,532</b>	<b>\$ 356,353</b>	<b>\$ 386,662</b>	<b>\$ 418,524</b>	<b>\$ 452,008</b>

**Appendix A5: Scenario 5 (Develop New Land) Revenue Requirement**



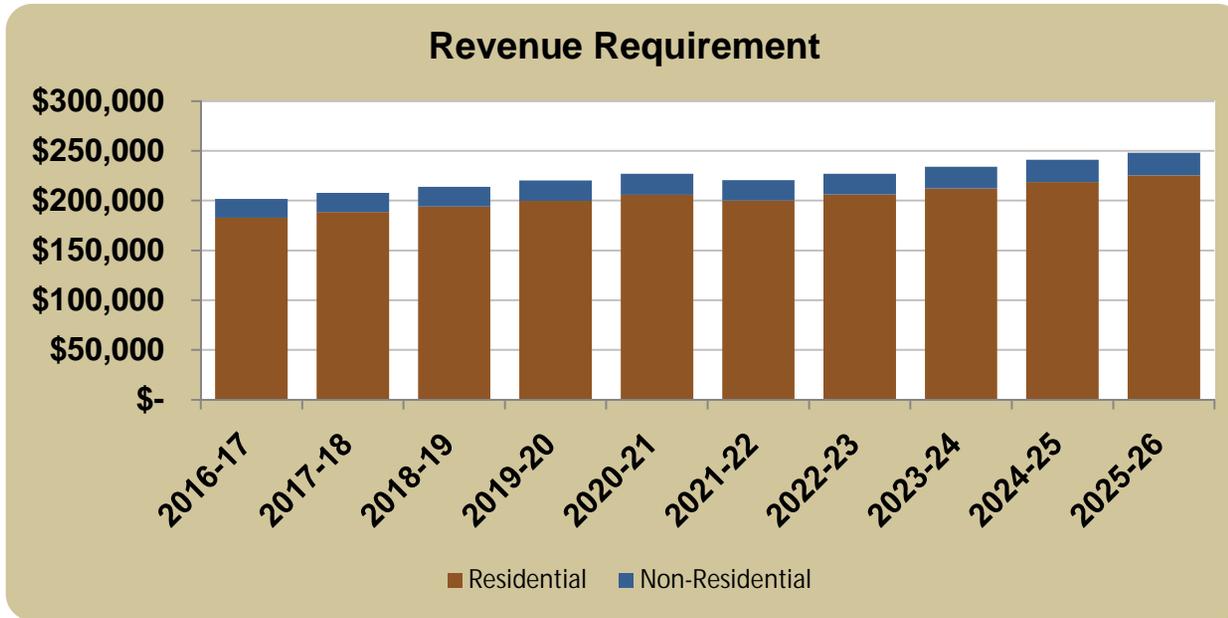
<b>Revenue Requirement: 10-Year Projections</b>	<b>Fiscal Year 2016-17</b>	<b>Fiscal Year 2017-18</b>	<b>Fiscal Year 2018-19</b>	<b>Fiscal Year 2019-20</b>	<b>Fiscal Year 2020-21</b>	<b>Fiscal Year 2021-22</b>	<b>Fiscal Year 2022-23</b>	<b>Fiscal Year 2023-24</b>	<b>Fiscal Year 2024-25</b>	<b>Fiscal Year 2025-26</b>
<b>Adjusted cost scenario:</b>										
Develop New Land	\$ 84,687	\$ 120,155	\$ 157,687	\$ 197,376	\$ 239,316	\$ 283,610	\$ 330,360	\$ 379,674	\$ 431,666	\$ 486,452
Manual adjustments	-	-	-	-	-	-	-	-	-	-
<b>Total expenditures</b>	<b>\$ 84,687</b>	<b>\$ 120,155</b>	<b>\$ 157,687</b>	<b>\$ 197,376</b>	<b>\$ 239,316</b>	<b>\$ 283,610</b>	<b>\$ 330,360</b>	<b>\$ 379,674</b>	<b>\$ 431,666</b>	<b>\$ 486,452</b>
<b>Allocated costs</b>										
Residential allocation	\$ 76,861	\$ 109,051	\$ 143,114	\$ 179,134	\$ 217,199	\$ 257,399	\$ 299,828	\$ 344,585	\$ 391,772	\$ 441,494
Non-residential allocation	7,827	11,105	14,573	18,241	22,118	26,211	30,532	35,089	39,894	44,958
<b>Total expenditures</b>	<b>\$ 84,687</b>	<b>\$ 120,155</b>	<b>\$ 157,687</b>	<b>\$ 197,376</b>	<b>\$ 239,316</b>	<b>\$ 283,610</b>	<b>\$ 330,360</b>	<b>\$ 379,674</b>	<b>\$ 431,666</b>	<b>\$ 486,452</b>

**Appendix A6: Scenario 6 (Recreational Programs) Revenue Requirement**



<b>Revenue Requirement: 10-Year Projections</b>	<b>Fiscal Year 2016-17</b>	<b>Fiscal Year 2017-18</b>	<b>Fiscal Year 2018-19</b>	<b>Fiscal Year 2019-20</b>	<b>Fiscal Year 2020-21</b>	<b>Fiscal Year 2021-22</b>	<b>Fiscal Year 2022-23</b>	<b>Fiscal Year 2023-24</b>	<b>Fiscal Year 2024-25</b>	<b>Fiscal Year 2025-26</b>
<b>Adjusted cost scenario:</b>										
Recreational Programs	\$ 153,076	\$ 182,040	\$ 425,845	\$ 519,180	\$ 617,733	\$ 392,478	\$ 405,820	\$ 419,522	\$ 433,592	\$ 448,024
Manual adjustments	-	-	-	-	-	-	-	-	-	-
<b>Total expenditures</b>	<b>\$ 153,076</b>	<b>\$ 182,040</b>	<b>\$ 425,845</b>	<b>\$ 519,180</b>	<b>\$ 617,733</b>	<b>\$ 392,478</b>	<b>\$ 405,820</b>	<b>\$ 419,522</b>	<b>\$ 433,592</b>	<b>\$ 448,024</b>
<b>Allocated costs</b>										
Residential allocation	\$ 138,929	\$ 165,216	\$ 386,488	\$ 471,198	\$ 560,643	\$ 356,205	\$ 368,314	\$ 380,750	\$ 393,519	\$ 406,618
Non-residential allocation	14,147	16,824	39,356	47,982	57,091	36,273	37,506	38,772	40,072	41,406
<b>Total expenditures</b>	<b>\$ 153,076</b>	<b>\$ 182,040</b>	<b>\$ 425,845</b>	<b>\$ 519,180</b>	<b>\$ 617,733</b>	<b>\$ 392,478</b>	<b>\$ 405,820</b>	<b>\$ 419,522</b>	<b>\$ 433,592</b>	<b>\$ 448,024</b>

**Appendix A7: Scenario 7 (Special Community Assets) Revenue Requirement**



<b>Revenue Requirement: 10-Year Projections</b>	<b>Fiscal Year 2016-17</b>	<b>Fiscal Year 2017-18</b>	<b>Fiscal Year 2018-19</b>	<b>Fiscal Year 2019-20</b>	<b>Fiscal Year 2020-21</b>	<b>Fiscal Year 2021-22</b>	<b>Fiscal Year 2022-23</b>	<b>Fiscal Year 2023-24</b>	<b>Fiscal Year 2024-25</b>	<b>Fiscal Year 2025-26</b>
<b>Adjusted cost scenario:</b>										
Special Community Assets	\$ 201,627	\$ 207,676	\$ 213,906	\$ 220,323	\$ 226,933	\$ 220,515	\$ 227,131	\$ 233,945	\$ 240,963	\$ 248,192
Manual adjustments	-	-	-	-	-	-	-	-	-	-
<b>Total expenditures</b>	<b>\$ 201,627</b>	<b>\$ 207,676</b>	<b>\$ 213,906</b>	<b>\$ 220,323</b>	<b>\$ 226,933</b>	<b>\$ 220,515</b>	<b>\$ 227,131</b>	<b>\$ 233,945</b>	<b>\$ 240,963</b>	<b>\$ 248,192</b>
<b>Allocated costs</b>										
Residential allocation	\$ 182,992	\$ 188,482	\$ 194,137	\$ 199,961	\$ 205,960	\$ 200,136	\$ 206,140	\$ 212,324	\$ 218,694	\$ 225,254
Non-residential allocation	18,634	19,193	19,769	20,362	20,973	20,380	20,991	21,621	22,270	22,938
<b>Total expenditures</b>	<b>\$ 201,627</b>	<b>\$ 207,676</b>	<b>\$ 213,906</b>	<b>\$ 220,323</b>	<b>\$ 226,933</b>	<b>\$ 220,515</b>	<b>\$ 227,131</b>	<b>\$ 233,945</b>	<b>\$ 240,963</b>	<b>\$ 248,192</b>

## APPENDIX B: EQUIVALENT DWELLING UNIT CALCULATIONS AND PROJECTIONS

### Appendix B1: Parks EDU Assumptions and Customer Statistics, City of Tigard (FY 2015-16)

Customer Group	Accounts <sup>1</sup>	Parking Stalls <sup>1</sup>	Jobs Per Stall <sup>2</sup>	DUs per Stall <sup>3</sup>	Occupancy Factor <sup>1</sup>	EDU Factor <sup>4</sup>	EDUs <sup>4</sup>
Commercial	916	40,309	0.76		0.995	15	2,029
Industrial	13	718	1.19		1.000	15	57
Multifamily	587	7,433		1.05	0.942	1.0	7,373
Single Family	13,222	13,222		1.00	0.992	1.0	13,114
<b>TOTAL</b>							
<b>Commercial &amp; Industrial</b>	929						<b>2,086</b>
<b>Residential</b>	13,809						<b>20,487</b>

Notes

<sup>1</sup> Derived from City of Tigard, Street Maintenance Fee customer data.

<sup>2</sup> Calculated based on current estimated jobs (Oregon Employment Department and local business survey data for Tigard).

<sup>3</sup> Calculated based on current estimated dwellings (American Community Survey, 2013 data for City of Tigard)

<sup>4</sup> EDU = equivalent dwelling unit. **Note:** Non-residential ERUs calculated by dividing the number of jobs in Tigard (40,746 based on data gathered for the parks SDC methodology) by a conversion factor of 15 employees per EDU (based on calculations in the Tigard Parks and Trails SDC Methodology Report, 2015).

Compiled by FCS GROUP.

### Appendix B2: 10-Year EDU Projections (All Scenarios)

EDUs: 10-Year Projections	Fiscal Year 2016-17	Fiscal Year 2017-18	Fiscal Year 2018-19	Fiscal Year 2019-20	Fiscal Year 2020-21	Fiscal Year 2021-22	Fiscal Year 2022-23	Fiscal Year 2023-24	Fiscal Year 2024-25	Fiscal Year 2025-26
Residential, single-family	13,173	13,232	13,292	13,352	13,412	13,472	13,533	13,594	13,655	13,716
Residential, multi-family	7,406	7,440	7,473	7,507	7,540	7,574	7,608	7,643	7,677	7,712
Non-residential, commercial	2,038	2,048	2,057	2,066	2,075	2,085	2,094	2,103	2,113	2,122
Non-residential, industrial	57	58	58	58	58	59	59	59	59	60
<b>Total</b>	<b>22,675</b>	<b>22,777</b>	<b>22,879</b>	<b>22,982</b>	<b>23,086</b>	<b>23,190</b>	<b>23,294</b>	<b>23,399</b>	<b>23,504</b>	<b>23,610</b>

## APPENDIX C: 10-YEAR RATE PROJECTION

### Appendix C1: 10-Year Rate Projections

Rate Calculation: 10-Year Projections	Fiscal Year 2016-17	Fiscal Year 2017-18	Fiscal Year 2018-19	Fiscal Year 2019-20	Fiscal Year 2020-21	Fiscal Year 2021-22	Fiscal Year 2022-23	Fiscal Year 2023-24	Fiscal Year 2024-25	Fiscal Year 2025-26
<b>Required annual revenue per EDU</b>										
Residential	\$ 98.17	\$ 101.89	\$ 105.76	\$ 109.80	\$ 114.00	\$ 118.38	\$ 122.95	\$ 127.72	\$ 132.68	\$ 137.86
Non-residential	\$ 98.17	\$ 101.89	\$ 105.76	\$ 109.80	\$ 114.00	\$ 118.38	\$ 122.95	\$ 127.72	\$ 132.68	\$ 137.86
<b>Monthly rate per EDU</b>										
Residential	\$ 8.18	\$ 8.49	\$ 8.81	\$ 9.15	\$ 9.50	\$ 9.87	\$ 10.25	\$ 10.64	\$ 11.06	\$ 11.49
Non-residential	\$ 8.18	\$ 8.49	\$ 8.81	\$ 9.15	\$ 9.50	\$ 9.87	\$ 10.25	\$ 10.64	\$ 11.06	\$ 11.49
<b>Two-year monthly rate per EDU</b>										
Residential	\$ 8.35	\$ 8.35	\$ 9.00	\$ 9.00	\$ 9.70	\$ 9.70	\$ 10.47	\$ 10.47	\$ 11.30	\$ 11.30
Non-residential	\$ 8.35	\$ 8.35	\$ 9.00	\$ 9.00	\$ 9.70	\$ 9.70	\$ 10.47	\$ 10.47	\$ 11.30	\$ 11.30
<b>Five-year monthly rate per EDU</b>										
Residential	\$ 8.91	\$ 8.91	\$ 8.91	\$ 8.91	\$ 8.91	\$ 10.76	\$ 10.76	\$ 10.76	\$ 10.76	\$ 10.76
Non-residential	\$ 8.91	\$ 8.91	\$ 8.91	\$ 8.91	\$ 8.91	\$ 10.76	\$ 10.76	\$ 10.76	\$ 10.76	\$ 10.76
<b>Ten-year monthly rate per EDU</b>										
Residential	\$ 9.96	\$ 9.96	\$ 9.96	\$ 9.96	\$ 9.96	\$ 9.96	\$ 9.96	\$ 9.96	\$ 9.96	\$ 9.96
Non-residential	\$ 9.96	\$ 9.96	\$ 9.96	\$ 9.96	\$ 9.96	\$ 9.96	\$ 9.96	\$ 9.96	\$ 9.96	\$ 9.96

### Appendix C2: Scenario 2 (Deferred Maintenance) 10-Year Rate Projections

Rate Calculation: 10-Year Projections	Fiscal Year 2016-17	Fiscal Year 2017-18	Fiscal Year 2018-19	Fiscal Year 2019-20	Fiscal Year 2020-21	Fiscal Year 2021-22	Fiscal Year 2022-23	Fiscal Year 2023-24	Fiscal Year 2024-25	Fiscal Year 2025-26
<b>Required annual revenue per EDU</b>										
Residential	\$ 52.02	\$ 13.46	\$ 20.83	\$ 12.64	\$ 13.83	\$ 11.01	\$ 15.90	\$ 18.42	\$ 21.64	\$ 10.35
Non-residential	\$ 52.02	\$ 13.46	\$ 20.83	\$ 12.64	\$ 13.83	\$ 11.01	\$ 15.90	\$ 18.42	\$ 21.64	\$ 10.35
<b>Monthly rate per EDU</b>										
Residential	\$ 4.33	\$ 1.12	\$ 1.74	\$ 1.05	\$ 1.15	\$ 0.92	\$ 1.32	\$ 1.54	\$ 1.80	\$ 0.86
Non-residential	\$ 4.33	\$ 1.12	\$ 1.74	\$ 1.05	\$ 1.15	\$ 0.92	\$ 1.32	\$ 1.54	\$ 1.80	\$ 0.86
<b>Two-year monthly rate per EDU</b>										
Residential	\$ 2.73	\$ 2.73	\$ 1.40	\$ 1.40	\$ 1.04	\$ 1.04	\$ 1.43	\$ 1.43	\$ 1.33	\$ 1.33
Non-residential	\$ 2.73	\$ 2.73	\$ 1.40	\$ 1.40	\$ 1.04	\$ 1.04	\$ 1.43	\$ 1.43	\$ 1.33	\$ 1.33
<b>Five-year monthly rate per EDU</b>										
Residential	\$ 1.89	\$ 1.89	\$ 1.89	\$ 1.89	\$ 1.89	\$ 1.30	\$ 1.30	\$ 1.30	\$ 1.30	\$ 1.30
Non-residential	\$ 1.89	\$ 1.89	\$ 1.89	\$ 1.89	\$ 1.89	\$ 1.30	\$ 1.30	\$ 1.30	\$ 1.30	\$ 1.30
<b>Ten-year monthly rate per EDU</b>										
Residential	\$ 1.61	\$ 1.61	\$ 1.61	\$ 1.61	\$ 1.61	\$ 1.61	\$ 1.61	\$ 1.61	\$ 1.61	\$ 1.61
Non-residential	\$ 1.61	\$ 1.61	\$ 1.61	\$ 1.61	\$ 1.61	\$ 1.61	\$ 1.61	\$ 1.61	\$ 1.61	\$ 1.61

**Appendix C3: Scenario 3 (Fully Fund CIP Projects) 10-Year Rate Projections**

<b>Rate Calculation: 10-Year Projections</b>	<b>Fiscal Year 2016-17</b>	<b>Fiscal Year 2017-18</b>	<b>Fiscal Year 2018-19</b>	<b>Fiscal Year 2019-20</b>	<b>Fiscal Year 2020-21</b>	<b>Fiscal Year 2021-22</b>	<b>Fiscal Year 2022-23</b>	<b>Fiscal Year 2023-24</b>	<b>Fiscal Year 2024-25</b>	<b>Fiscal Year 2025-26</b>
<b>Required annual revenue per EDU</b>										
Residential	\$ 37.82	\$ 26.52	\$ 51.33	\$ -	\$ -	\$ 23.76	\$ 24.72	\$ 25.71	\$ 26.75	\$ 27.83
Non-residential	\$ 37.82	\$ 26.52	\$ 51.33	\$ -	\$ -	\$ 23.76	\$ 24.72	\$ 25.71	\$ 26.75	\$ 27.83
<b>Monthly rate per EDU</b>										
Residential	\$ 3.15	\$ 2.21	\$ 4.28	\$ -	\$ -	\$ 1.98	\$ 2.06	\$ 2.14	\$ 2.23	\$ 2.32
Non-residential	\$ 3.15	\$ 2.21	\$ 4.28	\$ -	\$ -	\$ 1.98	\$ 2.06	\$ 2.14	\$ 2.23	\$ 2.32
<b>Two-year monthly rate per EDU</b>										
Residential	\$ 2.69	\$ 2.69	\$ 2.14	\$ 2.14	\$ 0.99	\$ 0.99	\$ 2.11	\$ 2.11	\$ 2.28	\$ 2.28
Non-residential	\$ 2.69	\$ 2.69	\$ 2.14	\$ 2.14	\$ 0.99	\$ 0.99	\$ 2.11	\$ 2.11	\$ 2.28	\$ 2.28
<b>Five-year monthly rate per EDU</b>										
Residential	\$ 1.94	\$ 1.94	\$ 1.94	\$ 1.94	\$ 1.94	\$ 2.17	\$ 2.17	\$ 2.17	\$ 2.17	\$ 2.17
Non-residential	\$ 1.94	\$ 1.94	\$ 1.94	\$ 1.94	\$ 1.94	\$ 2.17	\$ 2.17	\$ 2.17	\$ 2.17	\$ 2.17
<b>Ten-year monthly rate per EDU</b>										
Residential	\$ 2.08	\$ 2.08	\$ 2.08	\$ 2.08	\$ 2.08	\$ 2.08	\$ 2.08	\$ 2.08	\$ 2.08	\$ 2.08
Non-residential	\$ 2.08	\$ 2.08	\$ 2.08	\$ 2.08	\$ 2.08	\$ 2.08	\$ 2.08	\$ 2.08	\$ 2.08	\$ 2.08

**Appendix C4: Scenario 4 (Develop Current Land) 10-Year Rate Projections**

<b>Rate Calculation: 10-Year Projections</b>	<b>Fiscal Year 2016-17</b>	<b>Fiscal Year 2017-18</b>	<b>Fiscal Year 2018-19</b>	<b>Fiscal Year 2019-20</b>	<b>Fiscal Year 2020-21</b>	<b>Fiscal Year 2021-22</b>	<b>Fiscal Year 2022-23</b>	<b>Fiscal Year 2023-24</b>	<b>Fiscal Year 2024-25</b>	<b>Fiscal Year 2025-26</b>
<b>Required annual revenue per EDU</b>										
Residential	\$ 8.98	\$ 9.92	\$ 10.90	\$ 11.93	\$ 13.00	\$ 14.12	\$ 15.30	\$ 16.52	\$ 17.81	\$ 19.14
Non-residential	\$ 8.98	\$ 9.92	\$ 10.90	\$ 11.93	\$ 13.00	\$ 14.12	\$ 15.30	\$ 16.52	\$ 17.81	\$ 19.14
<b>Monthly rate per EDU</b>										
Residential	\$ 0.75	\$ 0.83	\$ 0.91	\$ 0.99	\$ 1.08	\$ 1.18	\$ 1.27	\$ 1.38	\$ 1.48	\$ 1.60
Non-residential	\$ 0.75	\$ 0.83	\$ 0.91	\$ 0.99	\$ 1.08	\$ 1.18	\$ 1.27	\$ 1.38	\$ 1.48	\$ 1.60
<b>Two-year monthly rate per EDU</b>										
Residential	\$ 0.79	\$ 0.79	\$ 0.95	\$ 0.95	\$ 1.13	\$ 1.13	\$ 1.33	\$ 1.33	\$ 1.54	\$ 1.54
Non-residential	\$ 0.79	\$ 0.79	\$ 0.95	\$ 0.95	\$ 1.13	\$ 1.13	\$ 1.33	\$ 1.33	\$ 1.54	\$ 1.54
<b>Five-year monthly rate per EDU</b>										
Residential	\$ 0.92	\$ 0.92	\$ 0.92	\$ 0.92	\$ 0.92	\$ 1.40	\$ 1.40	\$ 1.40	\$ 1.40	\$ 1.40
Non-residential	\$ 0.92	\$ 0.92	\$ 0.92	\$ 0.92	\$ 0.92	\$ 1.40	\$ 1.40	\$ 1.40	\$ 1.40	\$ 1.40
<b>Ten-year monthly rate per EDU</b>										
Residential	\$ 1.17	\$ 1.17	\$ 1.17	\$ 1.17	\$ 1.17	\$ 1.17	\$ 1.17	\$ 1.17	\$ 1.17	\$ 1.17
Non-residential	\$ 1.17	\$ 1.17	\$ 1.17	\$ 1.17	\$ 1.17	\$ 1.17	\$ 1.17	\$ 1.17	\$ 1.17	\$ 1.17

**Appendix C5: Scenario 5 (Develop New Land) 10-Year Rate Projections**

<b>Rate Calculation: 10-Year Projections</b>	<b>Fiscal Year 2016-17</b>	<b>Fiscal Year 2017-18</b>	<b>Fiscal Year 2018-19</b>	<b>Fiscal Year 2019-20</b>	<b>Fiscal Year 2020-21</b>	<b>Fiscal Year 2021-22</b>	<b>Fiscal Year 2022-23</b>	<b>Fiscal Year 2023-24</b>	<b>Fiscal Year 2024-25</b>	<b>Fiscal Year 2025-26</b>
<b>Required annual revenue per EDU</b>										
Residential	\$ 3.73	\$ 5.28	\$ 6.89	\$ 8.59	\$ 10.37	\$ 12.23	\$ 14.18	\$ 16.23	\$ 18.37	\$ 20.60
Non-residential	\$ 3.73	\$ 5.28	\$ 6.89	\$ 8.59	\$ 10.37	\$ 12.23	\$ 14.18	\$ 16.23	\$ 18.37	\$ 20.60
<b>Monthly rate per EDU</b>										
Residential	\$ 0.31	\$ 0.44	\$ 0.57	\$ 0.72	\$ 0.86	\$ 1.02	\$ 1.18	\$ 1.35	\$ 1.53	\$ 1.72
Non-residential	\$ 0.31	\$ 0.44	\$ 0.57	\$ 0.72	\$ 0.86	\$ 1.02	\$ 1.18	\$ 1.35	\$ 1.53	\$ 1.72
<b>Two-year monthly rate per EDU</b>										
Residential	\$ 0.38	\$ 0.38	\$ 0.65	\$ 0.65	\$ 0.94	\$ 0.94	\$ 1.27	\$ 1.27	\$ 1.63	\$ 1.63
Non-residential	\$ 0.38	\$ 0.38	\$ 0.65	\$ 0.65	\$ 0.94	\$ 0.94	\$ 1.27	\$ 1.27	\$ 1.63	\$ 1.63
<b>Five-year monthly rate per EDU</b>										
Residential	\$ 0.59	\$ 0.59	\$ 0.59	\$ 0.59	\$ 0.59	\$ 1.37	\$ 1.37	\$ 1.37	\$ 1.37	\$ 1.37
Non-residential	\$ 0.59	\$ 0.59	\$ 0.59	\$ 0.59	\$ 0.59	\$ 1.37	\$ 1.37	\$ 1.37	\$ 1.37	\$ 1.37
<b>Ten-year monthly rate per EDU</b>										
Residential	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00
Non-residential	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00

**Appendix C6: Scenario 6 (Recreational Programs) 10-Year Rate Projections**

<b>Rate Calculation: 10-Year Projections</b>	<b>Fiscal Year 2016-17</b>	<b>Fiscal Year 2017-18</b>	<b>Fiscal Year 2018-19</b>	<b>Fiscal Year 2019-20</b>	<b>Fiscal Year 2020-21</b>	<b>Fiscal Year 2021-22</b>	<b>Fiscal Year 2022-23</b>	<b>Fiscal Year 2023-24</b>	<b>Fiscal Year 2024-25</b>	<b>Fiscal Year 2025-26</b>
<b>Required annual revenue per EDU</b>										
Residential	\$ 6.75	\$ 7.99	\$ 18.61	\$ 22.59	\$ 26.76	\$ 16.92	\$ 17.42	\$ 17.93	\$ 18.45	\$ 18.98
Non-residential	\$ 6.75	\$ 7.99	\$ 18.61	\$ 22.59	\$ 26.76	\$ 16.92	\$ 17.42	\$ 17.93	\$ 18.45	\$ 18.98
<b>Monthly rate per EDU</b>										
Residential	\$ 0.56	\$ 0.67	\$ 1.55	\$ 1.88	\$ 2.23	\$ 1.41	\$ 1.45	\$ 1.49	\$ 1.54	\$ 1.58
Non-residential	\$ 0.56	\$ 0.67	\$ 1.55	\$ 1.88	\$ 2.23	\$ 1.41	\$ 1.45	\$ 1.49	\$ 1.54	\$ 1.58
<b>Two-year monthly rate per EDU</b>										
Residential	\$ 0.62	\$ 0.62	\$ 1.72	\$ 1.72	\$ 1.82	\$ 1.82	\$ 1.48	\$ 1.48	\$ 1.56	\$ 1.56
Non-residential	\$ 0.62	\$ 0.62	\$ 1.72	\$ 1.72	\$ 1.82	\$ 1.82	\$ 1.48	\$ 1.48	\$ 1.56	\$ 1.56
<b>Five-year monthly rate per EDU</b>										
Residential	\$ 1.39	\$ 1.39	\$ 1.39	\$ 1.39	\$ 1.39	\$ 1.51	\$ 1.51	\$ 1.51	\$ 1.51	\$ 1.51
Non-residential	\$ 1.39	\$ 1.39	\$ 1.39	\$ 1.39	\$ 1.39	\$ 1.51	\$ 1.51	\$ 1.51	\$ 1.51	\$ 1.51
<b>Ten-year monthly rate per EDU</b>										
Residential	\$ 1.47	\$ 1.47	\$ 1.47	\$ 1.47	\$ 1.47	\$ 1.47	\$ 1.47	\$ 1.47	\$ 1.47	\$ 1.47
Non-residential	\$ 1.47	\$ 1.47	\$ 1.47	\$ 1.47	\$ 1.47	\$ 1.47	\$ 1.47	\$ 1.47	\$ 1.47	\$ 1.47

**Appendix C7: Scenario 7 (Special Community Assets) 10-Year Rate Projections**

<b>Rate Calculation: 10-Year Projections</b>	<b>Fiscal Year 2016-17</b>	<b>Fiscal Year 2017-18</b>	<b>Fiscal Year 2018-19</b>	<b>Fiscal Year 2019-20</b>	<b>Fiscal Year 2020-21</b>	<b>Fiscal Year 2021-22</b>	<b>Fiscal Year 2022-23</b>	<b>Fiscal Year 2023-24</b>	<b>Fiscal Year 2024-25</b>	<b>Fiscal Year 2025-26</b>
<b>Required annual revenue per EDU</b>										
Residential	\$ 8.89	\$ 9.12	\$ 9.35	\$ 9.59	\$ 9.83	\$ 9.51	\$ 9.75	\$ 10.00	\$ 10.25	\$ 10.51
Non-residential	\$ 8.89	\$ 9.12	\$ 9.35	\$ 9.59	\$ 9.83	\$ 9.51	\$ 9.75	\$ 10.00	\$ 10.25	\$ 10.51
<b>Monthly rate per EDU</b>										
Residential	\$ 0.74	\$ 0.76	\$ 0.78	\$ 0.80	\$ 0.82	\$ 0.79	\$ 0.81	\$ 0.83	\$ 0.85	\$ 0.88
Non-residential	\$ 0.74	\$ 0.76	\$ 0.78	\$ 0.80	\$ 0.82	\$ 0.79	\$ 0.81	\$ 0.83	\$ 0.85	\$ 0.88
<b>Two-year monthly rate per EDU</b>										
Residential	\$ 0.75	\$ 0.75	\$ 0.79	\$ 0.79	\$ 0.81	\$ 0.81	\$ 0.82	\$ 0.82	\$ 0.87	\$ 0.87
Non-residential	\$ 0.75	\$ 0.75	\$ 0.79	\$ 0.79	\$ 0.81	\$ 0.81	\$ 0.82	\$ 0.82	\$ 0.87	\$ 0.87
<b>Five-year monthly rate per EDU</b>										
Residential	\$ 0.79	\$ 0.79	\$ 0.79	\$ 0.79	\$ 0.79	\$ 0.84	\$ 0.84	\$ 0.84	\$ 0.84	\$ 0.84
Non-residential	\$ 0.79	\$ 0.79	\$ 0.79	\$ 0.79	\$ 0.79	\$ 0.84	\$ 0.84	\$ 0.84	\$ 0.84	\$ 0.84
<b>Ten-year monthly rate per EDU</b>										
Residential	\$ 0.82	\$ 0.82	\$ 0.82	\$ 0.82	\$ 0.82	\$ 0.82	\$ 0.82	\$ 0.82	\$ 0.82	\$ 0.82
Non-residential	\$ 0.82	\$ 0.82	\$ 0.82	\$ 0.82	\$ 0.82	\$ 0.82	\$ 0.82	\$ 0.82	\$ 0.82	\$ 0.82

## APPENDIX D: TIGARD PARKS UTILITY COST ASSUMPTIONS BY SCENARIO

### Appendix D1: Scenario 2 (Deferred Maintenance) Associated Costs

2. Deferred Parks Maintenance	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	Inflation Notes	Escalation
Year Needing Replacement	Fiscal Year 2016-17	Fiscal Year 2017-18	Fiscal Year 2018-19	Fiscal Year 2019-20	Fiscal Year 2020-21	Fiscal Year 2021-22	Fiscal Year 2022-23	Fiscal Year 2023-24	Fiscal Year 2024-25	Fiscal Year 2025-26		
Parks Equipment	\$207,800	\$31,000	\$102,000	\$10,000	\$79,500	\$15,000	\$22,000	\$117,000	\$55,000	\$0	Materials & Services	3.00%
Parks Asset Inventory	\$602,300	\$35,000	\$138,500	\$25,000	\$25,000	\$25,000	\$95,000	\$42,000	\$137,000	\$0	Capital	4.50%
Parks Facilities Rent (depreciation)	\$31,751	\$31,751	\$31,751	\$31,751	\$31,751	\$31,751	\$31,751	\$31,751	\$31,751	\$31,751	Capital	4.50%
Parks Trails (low end estimate)	\$125,588	\$125,588	\$125,588	\$125,588	\$125,588	\$125,588	\$125,588	\$125,588	\$125,588	\$125,588	Capital	4.50%
Parks Vehicles Replacement	\$166,682	\$59,902	\$25,298	\$54,873	\$0	\$0	\$0	\$0	\$0	\$0	Materials & Services	3.00%
<b>Total - Real Costs</b>	<b>\$1,134,121</b>	<b>\$283,241</b>	<b>\$423,137</b>	<b>\$247,212</b>	<b>\$261,839</b>	<b>\$197,339</b>	<b>\$274,339</b>	<b>\$316,339</b>	<b>\$349,339</b>	<b>\$157,339</b>		
Total - Nominal Costs	\$1,179,539	\$306,463	\$476,641	\$290,388	\$319,251	\$255,309	\$370,340	\$431,111	\$508,687	\$244,343		
<b>Nominal Average, Initial 5 Years</b>	<b>\$514,457</b>											

Source: City of Tigard, compiled by FCS GROUP

### Appendix D2: Scenario 3 (Fully Fund CIP Projects) Associated Costs

3. Identified Capital Improvement Projects (excludes bond proceeds and parks SDC funds)	Fiscal Year 2016-17	Fiscal Year 2017-18	Fiscal Year 2018-19	Fiscal Year 2019-20	Fiscal Year 2020-21	Fiscal Year 2021-22	Fiscal Year 2022-23	Fiscal Year 2023-24	Fiscal Year 2024-25	Fiscal Year 2025-26	Inflation	Inflation
<b>CIP Expenses</b>												
Internal Expenses	\$282,500	\$135,900	\$140,600	\$0	\$0							
External Expenses	\$3,410,000	\$3,100,250	\$1,433,900	\$150,000	\$150,000							
<b>Total Expenses</b>	<b>\$3,692,500</b>	<b>\$3,236,150</b>	<b>\$1,574,500</b>	<b>\$150,000</b>	<b>\$150,000</b>							
<b>CIP Identified Revenues</b>												
Bonds/SDCs	\$817,440	\$1,072,000	\$250,000	\$0	\$0							
Transfers from enterprise funds	\$97,560	\$0	\$0	\$0	\$0							
Transfers from transp CIP fund	\$0	\$0	\$1,174,500	\$0	\$0							
Regional Flexible Funds	\$1,670,000	\$1,410,000	\$0	\$0	\$0							
Transfers from parks capital fund	\$857,500	\$604,150	\$0	\$0	\$0							
Transfers from other funds (urban forestry)	\$250,000	\$150,000	\$150,000	\$150,000	\$150,000							
Transfers from other funds (general fund)	\$0	\$0	\$0	\$0	\$0							
<b>Total Revenues</b>	<b>\$3,692,500</b>	<b>\$3,236,150</b>	<b>\$1,574,500</b>	<b>\$150,000</b>	<b>\$150,000</b>							
<b>Costs Included in the Utility Fee</b>												
Transfers from Urban Forestry Fund	\$857,500	\$604,150	\$1,174,500	\$0	\$0						Capital	4.50%
<b>Total - Real Costs</b>	<b>\$857,500</b>	<b>\$604,150</b>	<b>\$1,174,500</b>	<b>\$0</b>	<b>\$0</b>	<b>\$527,230</b>	<b>\$527,230</b>	<b>\$527,230</b>	<b>\$527,230</b>	<b>\$527,230</b>		
Total - Nominal Costs	\$857,500	\$604,150	\$1,174,500	\$0	\$0	\$550,955	\$575,748	\$601,657	\$628,732	\$657,025		
<b>Nominal Average Over Years</b>	<b>\$565,027</b>											

Source: City of Tigard, compiled by FCS GROUP

### Appendix D3: Scenario 4 (Develop Current Land) Associated Costs

4. Development of Current Parks Land Inventory	Fiscal Year 2016-17	Fiscal Year 2017-18	Fiscal Year 2018-19	Fiscal Year 2019-20	Fiscal Year 2020-21	Fiscal Year 2021-22	Fiscal Year 2022-23	Fiscal Year 2023-24	Fiscal Year 2024-25	Fiscal Year 2025-26	Inflation Notes	Inflation
Annual Capital Costs	\$182,490	\$182,490	\$182,490	\$182,490	\$182,490	\$182,490	\$182,490	\$182,490	\$182,490	\$182,490	Capital	4.50%
Annual O&M Costs	\$12,546	\$25,092	\$37,638	\$50,184	\$62,730	\$75,276	\$87,822	\$100,368	\$112,914	\$125,460	Materials & Services	3.00%
<b>Total - Real Costs</b>	<b>\$195,036</b>	<b>\$207,582</b>	<b>\$220,128</b>	<b>\$232,674</b>	<b>\$245,220</b>	<b>\$257,766</b>	<b>\$270,312</b>	<b>\$282,858</b>	<b>\$295,404</b>	<b>\$307,950</b>		
Total - Nominal Costs	\$203,624	\$225,903	\$249,379	\$274,105	\$300,136	\$327,532	\$356,353	\$386,662	\$418,524	\$452,008		
<b>Nominal Average Over Years</b>	<b>\$319,423</b>											

Source: City of Tigard, compiled by FCS GROUP

Note: This analysis excludes bond proceeds and parks SDC funds.

**Appendix D4: Scenario 5 (Develop New Land) Associated Costs**

5. Development of New Parks on Land Not Yet Acquired												
	Fiscal Year 2016-17	Fiscal Year 2017-18	Fiscal Year 2018-19	Fiscal Year 2019-20	Fiscal Year 2020-21	Fiscal Year 2021-22	Fiscal Year 2022-23	Fiscal Year 2023-24	Fiscal Year 2024-25	Fiscal Year 2025-26	Inflation Notes	Inflation
Annual Capital Costs	\$51,194	\$51,194	\$51,194	\$51,194	\$51,194	\$51,194	\$51,194	\$51,194	\$51,194	\$51,194	Capital	4.50%
Annual O&M Costs	\$30,281	\$60,562	\$90,842	\$121,123	\$151,404	\$181,685	\$211,966	\$242,246	\$272,527	\$302,808	Materials & Services	3.00%
<b>Total - Real Costs</b>	<b>\$81,475</b>	<b>\$111,756</b>	<b>\$142,037</b>	<b>\$172,318</b>	<b>\$202,598</b>	<b>\$232,879</b>	<b>\$263,160</b>	<b>\$293,441</b>	<b>\$323,722</b>	<b>\$354,002</b>		
Total - Nominal Costs	\$84,687	\$120,155	\$157,687	\$197,376	\$239,316	\$283,610	\$330,360	\$379,674	\$431,666	\$486,452		
Nominal Average Over Years	\$271,098											

Source: City of Tigard, compiled by FCS GROUP  
 Note: This analysis excludes bond proceeds and parks SDC funds.

**Appendix D5: Scenario 6 (Recreational Programs) Associated Costs**

6. Introduction of Recreational Programs												
Year of Implementation	Fiscal Year 2016-17	Fiscal Year 2017-18	Fiscal Year 2018-19	Fiscal Year 2019-20	Fiscal Year 2020-21	Fiscal Year 2021-22	Fiscal Year 2022-23	Fiscal Year 2023-24	Fiscal Year 2024-25	Fiscal Year 2025-26	Inflation Notes	Inflation
Recreation Staffing - 1 FTE first two years; 2 FTE in all following years	\$135,000	\$135,000	\$230,000	\$230,000	\$230,000						Personnel Services	4.00%
Professional Services - Recreation Guide Equipment & Technology - Online Reservation System	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000						Materials & Services	3.00%
City Investment - Grants, Scholarships, and Pilot Programs	\$0	\$0	\$100,000	\$200,000	\$300,000						Materials & Services	3.00%
Program Revenue	\$56,000	\$87,500	\$200,000	\$200,000	\$200,000						Materials & Services	3.00%
	(\$63,300)	(\$72,750)	(\$165,000)	(\$195,000)	(\$225,000)							
<b>Total - Real Costs</b>	<b>\$147,700</b>	<b>\$169,750</b>	<b>\$385,000</b>	<b>\$455,000</b>	<b>\$525,000</b>	<b>\$336,490</b>	<b>\$336,490</b>	<b>\$336,490</b>	<b>\$336,490</b>	<b>\$336,490</b>		
Total - Nominal Costs	\$153,076	\$182,040	\$425,845	\$519,180	\$617,733	\$392,478	\$405,820	\$419,522	\$433,592	\$448,024		
Nominal Average Over Years	\$399,731											

Source: City of Tigard, Recreation Program Study, March 2015; compiled by FCS GROUP

**Appendix D6: Scenario 7 (Special Community Assets) Associated Costs**

7. Inclusion of Special Community Assets												
	Fiscal Year 2016-17	Fiscal Year 2017-18	Fiscal Year 2018-19	Fiscal Year 2019-20	Fiscal Year 2020-21	Fiscal Year 2021-22	Fiscal Year 2022-23	Fiscal Year 2023-24	Fiscal Year 2024-25	Fiscal Year 2025-26	Inflation Notes	Inflation
Arts and Cultural Program Costs	\$95,754	\$95,754	\$95,754	\$95,754	\$95,754						Materials & Services	3.00%
Stormwater Program Costs	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000						Materials & Services	3.00%
<b>Total - Real Costs</b>	<b>\$195,754</b>											
Total - Nominal Costs	\$201,627	\$207,676	\$213,906	\$220,323	\$226,933	\$220,515	\$227,131	\$233,945	\$240,963	\$248,192		
Nominal Average Over Years	\$224,121											

Source: City of Tigard and FCS GROUP.

# APPENDIX E: TIGARD PARKS UTILITY SCENARIO COST ASSUMPTIONS

## Appendix E1: O&M current and estimated future costs

Estimated O/M Costs for Current & Future Park Development							
	Neighborhood & Pocket Parks	Community Parks	Linear Parks	Open Space	Trails	Total	Avg Net New Cost at end of each 5 year cycle
<b>Operations and Maintenance Costs</b>							
Costs per Acre	\$ 4,400	\$ 7,880	\$ 645	\$ 705	\$ 4,450		
Costs per Mile					\$ 10,900		
<b>Cost per Park Type</b>							
Current developed acres	53.0 ac	191.1 ac	23.1 ac	252.9 ac	4.6 ac	524.7	
Total O&M Costs	\$ 233,376	\$ 1,506,026	\$ 14,867	\$ 178,302	\$ 20,470	\$ 1,953,040	
Development of undeveloped parks and trails	23.0 ac	19.0 ac	0.0 ac	0.0 ac	0.0 ac	42.0	
Total O&M Costs	\$ 101,200	\$ 149,720	\$ -	\$ -	\$ -	\$ 250,920	\$ 62,730
Additional acres to acquire and develop	34.1 ac	42.1 ac	37.0 ac	66.1 ac	4.9 mi	184.2	
Total O&M Costs	\$ 149,821	\$ 331,753	\$ 23,892	\$ 46,631	\$ 53,519	\$ 605,616	\$ 151,404

Source: City of Tigard, compiled by Conservationtechnix; and FCS GROUP.

Existing Park Inventory (Acres) by Type & Development Level					
	Level 1	Level 2	Level 3	Level 4	Subtotal
Community	104.8	52.92	19.4		177.12
Neighborhood	18.86	29.12	9.43	2.77	60.18
Pocket	0.61				0.61
Open Space			102.14	178.37	280.51
Linear Park			5.13	17.92	23.05
Special Properties	18.15	0.13	0.18		18.46
Trails		4.6			4.6
Subtotal	142.42	86.77	136.28	199.06	564.53

Note: Level 1 is highest maintenance level; Level 4 is lowest

Source: City of Tigard, compiled by Conservationtechnix.

Estimated O/M Cost Percentages by Type & Development Level (Existing Invento		
By Development Level		
L1	62%	87%
L2	25%	
L3	7%	
L4	6%	
By Park Classification		
Community	72%	85%
Neighborhood	13%	
Pocket	0%	
Open Space	10%	
Linear Park	1%	
Special Properties	3%	
Trails	1%	

Estimated O/M Costs per Acre by Classification		
	Estimated	Rounded
Community	\$ 7,878	\$ 7,880
Neighborhood & Pocket	\$ 4,341	\$ 4,400
Open Space	\$ 705	\$ 705
Linear Park	\$ 645	\$ 645
Special Properties	\$ 2,877	\$ 2,880
Trails (per acre)	\$ 4,450	\$ 4,450
Trails (per mile)	\$ 10,900	\$ 10,900

Source: Conservationtechnix.

### Appendix E2: Identified Capital Improvement Projects

Fiscal Year Ending 6/30:	2015	2016	2017	2018	2019	2020	2021
<b>92013 - Fanno Creek Remeander</b>							
Revenues							
Bonds/SDCs	\$0	\$0	\$145,000	\$752,000	\$250,000	\$0	\$0
Expenses							
Internal Expenses	\$0	\$0	\$25,000	\$45,000	\$90,000	\$0	\$0
External Expenses	\$0	\$0	\$120,000	\$707,000	\$160,000	\$0	\$0
<b>92016 - Dirksen Nature Park</b>							
Revenues							
Bonds/SDCs	\$375,000	\$295,593	\$0	\$0	\$0	\$0	\$0
Transfers from enterprise funds	\$12,000	\$165,000	\$0	\$0	\$0	\$0	\$0
Transfers from other funds (urban forestry)	\$100,000	\$100,000	\$100,000	\$0	\$0	\$0	\$0
Transfers from parks capital fund	\$0	\$0	\$857,500	\$604,150	\$0	\$0	\$0
Transfers from transp CIP fund	\$0	\$0	\$0	\$0	\$1,174,500	\$0	\$0
Expenses							
Internal Expenses	\$77,000	\$55,393	\$57,500	\$40,900	\$50,600	\$0	\$0
External Expenses	\$410,000	\$505,200	\$900,000	\$563,250	\$1,123,900	\$0	\$0
<b>92017 - Tree Canopy Replacement Program</b>							
Revenues							
Transfers from other funds (urban forestry)	\$0	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Expenses							
Internal Expenses	\$0	\$0	\$0	\$0	\$0	\$0	\$0
External Expenses	\$0	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
<b>92026 - Park Land Acquisition</b>							
Revenues							
Bonds/SDCs	\$4,004	\$885,649	\$0	\$0	\$0	\$0	\$0
Expenses							
Internal Expenses	\$4,004	\$0	\$0	\$0	\$0	\$0	\$0
External Expenses	\$0	\$885,649	\$0	\$0	\$0	\$0	\$0
<b>92028 - Downtown Land Acquisition</b>							
Revenues							
Bonds/SDCs	\$530,000	\$770,000	\$0	\$0	\$0	\$0	\$0
Expenses							
Internal Expenses	\$0	\$0	\$0	\$0	\$0	\$0	\$0
External Expenses	\$530,000	\$770,000	\$0	\$0	\$0	\$0	\$0
<b>92034 - Tigard Street Trail and Public Space (Main St. to Tiedeman Ave./Tigard St.)</b>							
Revenues							
Bonds/SDCs	\$15,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Transfers from other funds (general fund)	\$20,000	\$0	\$0	\$0	\$0	\$0	\$0
Expenses							
Internal Expenses	\$35,000	\$10,000	\$0	\$0	\$0	\$0	\$0
External Expenses	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>92035 - City of Tigard/Tigard-Tualatin School District Park Development</b>							
Revenues							
Bonds/SDCs	\$0	\$135,000	\$0	\$0	\$0	\$0	\$0
Expenses							
Internal Expenses	\$0	\$0	\$0	\$0	\$0	\$0	\$0
External Expenses	\$0	\$135,000	\$0	\$0	\$0	\$0	\$0
<b>92037 - Damaged Tree Replacement Program</b>							
Revenues							
Transfers from other funds (urban forestry)	\$0	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000
Expenses							
Internal Expenses	\$0	\$0	\$0	\$0	\$0	\$0	\$0
External Expenses	\$0	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000
<b>92046 - Fanno Creek Trail Connection (RFFA Grant)</b>							
Revenues							
Bonds/SDCs	\$5,000	\$420,000	\$672,440	\$320,000	\$0	\$0	\$0
Transfers from enterprise funds	\$5,000	\$200,000	\$97,560	\$0	\$0	\$0	\$0
Regional Flexible Funds	\$0	\$0	\$1,670,000	\$1,410,000	\$0	\$0	\$0
Expenses							
Internal Expenses	\$10,000	\$169,107	\$200,000	\$50,000	\$0	\$0	\$0
External Expenses	\$0	\$450,893	\$2,240,000	\$1,680,000	\$0	\$0	\$0
<b>Total</b>							
Revenues							
Bonds/SDCs	\$929,004	\$2,516,242	\$817,440	\$1,072,000	\$250,000	\$0	\$0
Transfers from enterprise funds	\$17,000	\$365,000	\$97,560	\$0	\$0	\$0	\$0
Transfers from transp CIP fund	\$0	\$0	\$0	\$0	\$1,174,500	\$0	\$0
Regional Flexible Funds	\$0	\$0	\$1,670,000	\$1,410,000	\$0	\$0	\$0
Transfers from parks capital fund	\$0	\$0	\$857,500	\$604,150	\$0	\$0	\$0
Transfers from other funds (urban forestry)	\$100,000	\$250,000	\$250,000	\$150,000	\$150,000	\$150,000	\$150,000
Transfers from other funds (general fund)	\$20,000	\$0	\$0	\$0	\$0	\$0	\$0
Total Revenues	\$1,066,004	\$3,131,242	\$3,692,500	\$3,236,150	\$1,574,500	\$150,000	\$150,000
Expenses							
Internal Expenses	\$126,004	\$234,500	\$282,500	\$135,900	\$140,600	\$0	\$0
External Expenses	\$940,000	\$2,896,742	\$3,410,000	\$3,100,250	\$1,433,900	\$150,000	\$150,000
Total Expenses	\$1,066,004	\$3,131,242	\$3,692,500	\$3,236,150	\$1,574,500	\$150,000	\$150,000

Source: City of Tigard, compiled by FCS GROUP

**Appendix E3: Development of Current Parks Land Inventory & Addition of New Parks**

	Timing	City Cost for Land	Non-SDC Funded Portion	PARC-Eligible Costs	City Cost for Development	Non-SDC Funded Portion	PARC-Eligible Costs	Scenario 4 Eligible - Dev of Current Parks	Scenario 5 Eligible - Addition of new Parks
<b>Neighborhood/pocket parks:</b>									
<b>Total Land/Development</b>		<b>34.05</b>			<b>57.05</b>			<b>2.28</b>	<b>25.28</b>
Bonita Park	0-10 years	\$0	6.68%	\$0	\$75,000	44.30%	\$33,229	\$33,229	\$0
Metzger Elementary School	5-15 years	\$0	6.68%	\$0	\$437,000	44.30%	\$193,612	\$193,612	\$0
Northview Park	5-15 years	\$0	6.68%	\$0	\$367,000	44.30%	\$162,599	\$162,599	\$0
Proposed Local Park (P12)	5-15 years	\$549,840	6.68%	\$36,754	\$927,000	44.30%	\$410,706	\$0	\$447,460
Proposed Local Park (P9)	5-15 years	\$1,202,775	6.68%	\$80,399	\$927,000	44.30%	\$410,706	\$0	\$491,105
Future Neighborhood Park	10+ years	\$4,811,100	6.68%	\$321,595	\$2,947,800	44.30%	\$1,306,019	\$0	\$1,627,614
River Terrace Parks	1-20 years	\$3,752,000	6.68%	\$250,800	\$2,216,375	44.30%	\$981,962	\$0	\$1,232,762
<b>Total neighborhood/pocket parks</b>								<b>\$389,440</b>	<b>\$3,798,942</b>
<b>Community parks:</b>									
<b>Total Land/Development</b>		<b>42.10</b>			<b>61.10</b>			<b>0.00</b>	<b>0.00</b>
Sunrise Community Park	0-10 years	\$0	0.00%	\$0	\$2,468,000	0.00%	\$0	\$0	\$0
New Community Park (P11)	5-15 years	\$100,000	0.00%	\$0	\$900,000	0.00%	\$0	\$0	\$0
New Community Park Complex	10+ years	\$6,108,325	0.00%	\$0	\$10,084,000	0.00%	\$0	\$0	\$0
Fanno Creek Park: Urban Plaza	0-10 years	\$687,300	0.00%	\$0	\$4,100,000	0.00%	\$0	\$0	\$0
Community parks in River Terrace	1-20 years	\$7,508,000	0.00%	\$0	\$8,386,000	0.00%	\$0	\$0	\$0
<b>Total community parks</b>								<b>\$0</b>	<b>\$0</b>
<b>Linear parks:</b>									
<b>Total Land/Development</b>		<b>37.04</b>			<b>37.04</b>			<b>10.56</b>	<b>10.56</b>
Tigard Triangle Area (P3)	0-10 years	\$0	28.52%	\$0	\$250,000	28.52%	\$71,293	\$71,293	\$0
Commercial Park	5-15 years	\$0	28.52%	\$0	\$545,000	28.52%	\$155,420	\$155,420	\$0
Englewood Park	5-15 years	\$0	28.52%	\$0	\$1,340,000	28.52%	\$382,133	\$382,133	\$0
Fanno Creek Park: Park Gateway	0-10 years	\$0	28.52%	\$0	\$850,000	28.52%	\$242,398	\$242,398	\$0
Fanno Creek Park: Upland Park	0-10 years	\$0	28.52%	\$0	\$1,100,000	28.52%	\$313,691	\$313,691	\$0
Undeveloped Linear Park (P7)	5-15 years	\$0	28.52%	\$0	\$275,000	28.52%	\$78,423	\$78,423	\$0
River Terrace Linear Parks	1-20 years	\$3,128,000	28.52%	\$892,024	\$228,000	28.52%	\$65,020	\$0	\$957,044
<b>Total linear parks</b>								<b>\$1,243,358</b>	<b>\$957,044</b>
<b>Open space:</b>									
<b>Total Land/Development</b>		<b>66.14</b>			<b>66.14</b>			<b>0.00</b>	<b>0.00</b>
Open Space 1	5-15 years	\$412,380	0.00%	\$0	\$0	0.00%	\$0	\$0	\$0
Open Space 2	10+ years	\$567,023	0.00%	\$0	\$0	0.00%	\$0	\$0	\$0
<b>Total open space</b>								<b>\$0</b>	<b>\$0</b>
<b>Trails:</b>									
<b>Total Land/Development</b>		<b>6.75</b>			<b>6.75</b>			<b>0.00</b>	<b>0.00</b>
Fanno Creek (already funded) (trail project )	0-10 years	\$0	0.00%	\$0	\$670,000	0.00%	\$0	\$0	\$0
Westside Trail	0-10 years	\$0	0.00%	\$0	\$0	0.00%	\$0	\$0	\$0
Tigard Street (trail project A)	0-10 years	\$0	0.00%	\$0	\$634,000	0.00%	\$0	\$0	\$0
Fanno Creek (trail project C)	0-10 years	\$0	0.00%	\$0	\$1,040,000	0.00%	\$0	\$0	\$0
Fanno Creek & Tualatin River (trail project D)	0-10 years	\$0	0.00%	\$0	\$1,609,500	0.00%	\$0	\$0	\$0
Summer Creek (trail project F)	0-10 years	\$0	0.00%	\$0	\$742,500	0.00%	\$0	\$0	\$0
Fanno Creek (trail project G)	5-15 years	\$0	0.00%	\$0	\$0	0.00%	\$0	\$0	\$0
Fanno Creek (trail project H)	5-15 years	\$0	0.00%	\$0	\$206,500	0.00%	\$0	\$0	\$0
Tigard Street (trail project I)	5-15 years	\$0	0.00%	\$0	\$0	0.00%	\$0	\$0	\$0
Ascension (trail project N)	10+ years	\$0	0.00%	\$0	\$461,000	0.00%	\$0	\$0	\$0
Krueger Creek & Summer Creek (trail project P)	10+ years	\$0	0.00%	\$0	\$495,500	0.00%	\$0	\$0	\$0
River Terrace Trails	1-20 years	\$690,000	0.00%	\$0	\$764,000	0.00%	\$0	\$0	\$0
<b>Total trails</b>								<b>\$0</b>	<b>\$0</b>
<b>Total Costs</b>		<b>\$29,516,743</b>			<b>\$45,046,175</b>			<b>\$1,632,809</b>	<b>\$4,755,996</b>

Source: Parks SDC Methodology, compiled by FCS GROUP.

**Appendix E4: Arts and Culture Program Assumptions**

Arts and Culture Program Assumptions			
	Total Costs*	Per Capita Cost	Tigard
Personnel Services	\$20,640	\$0.27	\$13,232
Materials and Services	\$128,720	\$1.68	\$82,522
Capital Outlay	\$0	\$0.00	\$0
Other	\$0	\$0.00	\$0
<b>Total</b>	<b>\$149,360</b>	<b>\$1.95</b>	<b>\$95,754</b>
Population	76,650		49,140

Source: based on similar program in Medford, Oregon.





## **Fiscal Impact**

**Cost:** 298,720  
**Budgeted (yes or no):** yes, draft  
**Where Budgeted (department/program):** City Council

### **Additional Fiscal Notes:**

This is the proposed budget for Council and open to amendments by the group.

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## **Attachments**

Council Budget

Council Workload Measures & Narrative

City Council Budget Details

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# City of Tigard, Oregon

FY 2014	FY 2015	YTD 2016	Revised 2016	Budget Resource Summary	Requested 2017	Assumptions	Chg Pkg	
					0			Approved
					1,980	iPad data package for Mayor Cook, Councilor Woodard and Henderson. Surface Pro Tablet for Council Pres. Snider & Councilor Goodhouse (\$33 mo) Included in stipend for technology	.Base	Approved
					68,805	Mayor Stipend, \$45, 285 and Councilor annual Stipend \$5,880.	Existing Staff	Approved
					16,500	vehicle stipend for Mayor and each Councilor: \$275/month per Resolution #15-26	.Base	Approved
84,971	85,413	29,699	113,694	51001 - Salaries - Management	87,285	Approved only		
84,971	85,413	29,699	113,694	Total Personal Services - Salaries	87,285			

# City of Tigard, Oregon

FY 2014	FY 2015	YTD 2016	Revised 2016	Budget Resource Summary	Requested 2017	Assumptions	Chg Pkg	
					0			Approved
					6,500	Consultant fee for coaching and Council training	.Base	Approved
					400	Interpreter Services for hearing impaired at Council meetings (upon request)	.Base	Approved
					850	Photographer for Council group photo taken at swearing in event	.Base	Approved
					2,640	TVCTV taping of Council workshop meetings	.Base	Approved
9,974	13,766	2,220	9,540	54001 - Professional/Contractual Services	10,390	Approved only		
					0			Approved
					27,651	City Attorney legal support for Council - based on trends (Ramis notified us of a rate increase)	.Base	Approved
21,310	29,023	7,509	27,651	54003 - Legal Fees	27,651	Approved only		
					0			Approved
0	0	17	0	54114 - R & M - Office Equipment	0	Approved only		
					0			Approved
					25	Council's use of pool vehicles for close-in travel.	.Base	Approved
0	0	0	25	54115 - Vehicle Usage	25	Approved only		
					0			Approved
1,815	3,451	600	0	54205 - Utilites - Phone/Pager/Cells	0	Approved only		
					0			Approved
0	450	0	0	54300 - Advertising & Publicity	0	Approved only		
					0			Approved
					32,086	League of Oregon Cities membership (based on what we paid LOC for 2015/16 dues)	.Base	Approved
					4,467	National League of Cities membership (NLC dues are population based, cities over 50,000 pay \$4467)	.Base	Approved
					800	Oregon Ethics Commission filing dues	.Base	Approved
					188	Oregon Mayors Assn dues for Mayor Cook (population based)	.Base	Approved
					100	Other publications for Councilors	.Base	Approved
					120	Tigard Downtown Alliance dues (paid 1/4/16)	.Base	Approved
					3,489	U.S. Conference of Mayors membership	.Base	Approved
					2,500	Vision Action Network membership (Action Member status)	.Base	Approved

# City of Tigard, Oregon

FY 2014	FY 2015	YTD 2016	Revised 2016	Budget Resource Summary	Requested 2017	Assumptions	Chg Pkg	
					5,044	Westside Economic Alliance membership (Based on billing from July 2015)	.Base	Approved
39,059	43,782	37,130	50,234	54302 - Dues & Subscriptions	48,794	Approved only		
					0			Approved
					1,100	Business meals that are outside regular council meetings (Mayor only) (WEA forums, meetings with Metro and other jurisdictions, regional Mayor's dinner)	.Base	Approved
					1,400	Council meals before regularly scheduled Council meetings	.Base	Approved
					28,000	Councilors training budget - \$7,000 per councilor	.Base	Approved
					12,600	Mayor's training budget for conferences and meetings	.Base	Approved
					300	New Councilor/swearing in event cake and punch	.Base	Approved
					10,000	Tigard Youth Advisory - Washington DC, sending 2 youth plus chaperone (Was in city management budget previous fiscal year)	.Base	Approved
25,338	27,367	10,291	43,100	54303 - Travel and Training	53,400	Approved only		
					0			Approved
					800	Mayor and City Councilor clothing with city logo & name embroidery (spent this amount in 2015 at direction of Mayor and Councilors)	.	Approved
					600	Recognition, awards, florist (funeral, illness) from Council. Promotional items for visiting dignitaries and school age visitors.	.Base	Approved
					5,000	State of the City Reception	.Base	Approved
1,909	1,525	410	5,600	54311 - Special Department Expenses	6,400	Approved only		
99,405	119,364	58,177	136,150	<b>Total Services</b>	<b>146,660</b>			
240,746	271,509	114,569	322,824	<b>Total Requirements</b>	<b>309,890</b>			
240,746	271,509	114,569	322,824	<b>Total Mayor and Council</b>	<b>309,890</b>			

# City of Tigard, Oregon

FY 2014	FY 2015	YTD 2016	Revised 2016	Budget Resource Summary	Requested 2017	Proposed 2017	Approved 2017	Adopted 2017	Variance to Adopted '16	
	0.00	0.00	0.00	Total FTE	0.00					
84,971	85,413	29,699	113,694	51001 - Salaries - Management	87,285	0	0	0	-26,409	-23.2%
84,971	85,413	29,699	113,694	Total Personal Services - Salaries	87,285	0	0	0	-26,409	-23.2%
1,185	997	149	480	52001 - Unemployment	97	0	0	0	-383	-79.8%
507	585	183	221	52002 - Worker's Compensation	267	0	0	0	46	20.8%
6,620	6,279	2,064	7,288	52003 - Social Security/Medicare	7,364	0	0	0	76	1.0%
611	617	215	690	52004 - Tri-Met Tax	696	0	0	0	6	0.9%
0	0	0	266	52005 - Retirement	0	0	0	0	-266	-100.0%
42,176	51,550	21,209	63,235	52010 - Medical/Dental/Vision	66,721	0	0	0	3,486	5.5%
5,178	6,522	2,721	0	52011 - Dental Benefits	0	0	0	0	0	100.0%
56,277	66,551	26,540	72,180	Total Personal Services - Benefits	75,145	0	0	0	2,965	4.1%
93	182	152	800	53001 - Office Supplies	800	0	0	0	0	0.0%
93	182	152	800	Total Supplies	800	0	0	0	0	0.0%
9,974	13,767	2,220	9,540	54001 - Professional/Contractual Services	10,390	0	0	0	850	8.9%
21,310	29,023	7,509	27,651	54003 - Legal Fees	27,651	0	0	0	0	0.0%
0	0	17	0	54114 - R & M - Office Equipment	0	0	0	0	0	100.0%
0	0	0	25	54115 - Vehicle Usage	25	0	0	0	0	0.0%
1,815	3,451	600	0	54205 - Utilites - Phone/Pager/Cells	0	0	0	0	0	100.0%
0	450	0	0	54300 - Advertising & Publicity	0	0	0	0	0	100.0%
39,059	43,782	37,130	50,234	54302 - Dues & Subscriptions	48,794	0	0	0	-1,440	-2.9%
25,338	27,367	10,291	43,100	54303 - Travel and Training	53,400	0	0	0	10,300	23.9%
1,909	1,525	410	5,600	54311 - Special Department Expenses	6,400	0	0	0	800	14.3%
99,405	119,364	58,177	136,150	Total Services	146,660	0	0	0	10,510	7.7%
240,746	271,510	114,568	322,824	Total Requirements	309,890	0	0	0	-12,934	-4.0%
240,746	271,510	114,568	322,824	Total Mayor and Council	309,890	0	0	0	-12,934	-4.0%

PROGRAM DESCRIPTION:

The Mayor and four City Councilors provide legislative and policy leadership for city government. The Mayor and Councilors are elected by citizens for four-year terms on a non-partisan basis and serve part-time. The Council hires the City Manager to run day-to-day operations. The City Council reviews, revises and adopts city laws and policies and sets the overall direction of the city.

PROGRAM RESULTS:

- Basic city services provided to citizens are cost-effective and are delivered without interruption.
- Tigard's interest in regional and statewide activities is coordinated with appropriate agencies and jurisdictions.
- Tigard citizens are involved in the community and participate effectively.
- Programs and activities are available in the community to meet the needs of a diverse population.
- External and internal city assets are well managed and utilized.
- Master plans, management and fiscal policies are adopted; resources are allocated to position Tigard for the future.
- The community is engaged and connected to the city's strategic vision.

ACCOMPLISHMENTS:

FY 2015-2016:

**1. Provide Recreation Opportunities for the People of Tigard**

Accomplishments:

The city hired a recreation coordinator in December and a Park and Recreation Charge study is underway. Staff updated the Recreation Finder tool and Council placed a ballot title for a community center building on the November 2015 ballot. It was defeated by voters.

City continue to talk with recreation providers (THPRD & TTSD) about possible partnership opportunities.

**2. Make Downtown Tigard a Place Where People Want to Be**

Accomplishments:

The Ash/Burnham site was cleared, building permits issued and construction has begun on this mixed use redevelopment project.

The downtown Saxony property mixed-use public space design study got underway, complementing the installation of Gateway improvements which were completed.

The downtown's first Strolling Street is under construction at Maki/Wine Crafter/Elvia Hair Salon businesses, the Tigard Downtown Assn. Produced a successful Street Fair.

The Sidewalk Gap technical group finished its preliminary inventory and presented results at the October 20 Council Workshop. Tigard Street trail was paved as a temporary measure to allow pedestrian use and easier access to downtown.

### **3. Adopt Tigard Triangle Strategic Plan and Enable Future Development Capacity**

#### **Accomplishments:**

A Tigard Triangle Lean Code workshop was held September 14-17 to begin drafting code and zoning changes for the Tigard Triangle. The workshop provided an opportunity for the city leaders, Triangle landowners, business leaders, and developers to work with the PlaceMakers/DPZ/Crabtree consultant team to establish a framework for the new Lean Code to implement the Triangle Strategic Plan. Three public meetings were held. Drafts of the following documents received two rounds of public input and staff review: zoning map, street network plan, thoroughfare plan (which designates street classification and section requirements such as width, on-street parking, number of lanes, etc) and frontage types, which illustrates how different types of development will look on the sites.

The city was awarded a \$145,000 Metro Community Planning & Development Grant to investigate the feasibility of walkable mixed-use development and tools to facilitate such development.

A new section of sidewalk was completed to fill the gap between 68th Ave and the I-5 Bridge on Haines/Atlanta Streets, and a seating area at the "overlook" at 68th and Dartmouth using the Lighter, Quicker, Cheaper project funds.

Community Development held an ice cream social in the Tigard Triangle to promote the completion of the Dartmouth Overlook project and walkability in the Triangle.

### **4. Enable Groundbreaking in River Terrace by Summer 2015**

#### **Accomplishments:**

##### **Infrastructure Financing Project**

Discussions continue with HBA regarding their legal challenge of our residential transportation SDCs. Discussions are on hold with business community regarding proposed non-residential transportation SDCs due to HBA legal challenge. Citywide park utility fee of \$1.11/month is on track for adoption. River Terrace transportation and stormwater utility fee adoption schedule TBD.

River Terrace Community Plan Implementation:

A downstream analysis of River Terrace drainageways is complete; the final report is being prepared. An interdepartmental design review committee meets regularly to review park, stormwater facility and River Terrace Blvd design proposals. A consultant was hired to evaluate and make recommendations for optimal ped/bike connections, streetscape and intersection treatments, and wayfinding signage, while the city sent a letter to Metro requesting that the southern Urban Reserve Area be added to the UGB.

Permitting:

Six subdivision applications approved by the city for a total of over 1,000 homes; One subdivision application reviewed at a pre-application conference; Four demolition permits and three grading permits issued; Eight model home permits under review; One public facility improvement permit issued and another under review.

Public Facilities:

The Clean Water Services sewer pump station application was deemed complete and the public hearing before the Hearings Office happened on November 9.

A draft MSTIP IGA for funding Roy Rogers Rd reviewed by the city, awaiting county's comments.

River Terrace webpages revamped to reflect the project's shift from planning to development and to provide more background information ([FAQ](#)) and up-to-date development information

## 5. Expand Opportunities to Engage People in the Community

Accomplishments:

City Council hosted two events to talk about issues with residents: a Picnic in Summerlake Park (July) and a Tigard Tailgate at Tigard High (October). City staff completed a series of Community Ice Cream Visits to gain feedback on issues relevant to neighborhoods.

A Voters Forum was held at Twality Middle School on October 8 in service to three measures on the November ballot.

Open Budget Portal was deployed (<http://budget.tigard-or.gov/#!/year/default>) and went live with the new fiscal year. Staff added the CIP in August and had over 750 page views in one month. Finance staff worked with Socrata to add unaudited year-to-date actuals with the budget and explored the Open Checkbook application which would provide full detailed multi-year history on line.

Thirteen Tigard Walks events were held between January and December. In three instances walks supported community events planned to bring people outside.

The communications plan was completed in June with key messages to be used by all staff in external communications. The Communications Strategist and the Goal 3 Team for the

**Mayor and Council**

**BUDGET UNIT 0500**

Strategic Plan are using the plan’s three strategies to strengthen communications internally and externally and build public involvement with the Strategic Plan, including dynamic community engagement outside of City Hall.

Successful National Night Out neighborhood events were held throughout the city, with visits by the City Manager, Chief Orr, Asst. Chief deSulley, Mayor Cook and the City Councilors.

City Council received an award from the Oregon Chapter of the American Planning Assn. for leadership in adoption of strategic plan.

A plan to reboot the Neighborhood Network Program has been submitted to the City Manager.

**GOALS & OBJECTIVES:**

FY 2016-2017:

Council Goal Setting is scheduled for January 5, 2016.

**WORKLOAD MEASURES**

	2013-2014	2014-2015	2015-2016	2016-2017
Number of regional committees requiring elected official attendance	9	9	9	9
Number of City Council meetings	38	38	38	38
Average length (hours) of council meetings	3	3	3	3
Number of Resolutions adopted	78	78	78	78
Number of Ordinances adopted	20	20	20	20
Population served	48,695	49,135	50,444	50,750
Number of opportunities for residents to interact with elected officials (12 Fireside Chats, 16 1x10 events, 2 Town Halls)	NA	16	30	30

**EFFECTIVENESS MEASURES**

	2013-2014	2014-2015	2015-2016	2016-2017
Survey is conducted every other year.	Yes	No	Yes	No
Average rating on citizens' highest service priorities	8.5	8.5	8.5	8.5
Citizens rating overall city services as good or better	85%	0	93%	95%
Citizens who feel that Tigard will be a better place to live and work in the future	85%	0	85%	85%
Citizens rating overall city services as good or better	87%	0	87%	87%

**Mayor and Council**

**BUDGET UNIT 0500**

Citizens who say the city's long-term strategic vision represents their long-term vision (as measured in biennial survey)	49%*	0	55%	60%
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\*average of phone & web responses

*FULL-TIME EQUIVALENT POSITIONS*

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BUDGET UNIT 0500

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FY 2016-2017:

Council Goal Setting is scheduled for January 5, 2016.

WORKLOAD MEASURES

	2013-2014	2014-2015	2015-2016	2016-2017
Number of regional committees requiring elected official attendance	9	9	9	9
Number of City Council meetings	38	38	38	38
Average length (hours) of council meetings	3	3	3	3
Number of Resolutions adopted	78	78	78	78
Number of Ordinances adopted	20	20	20	20
Population served	48,695	49,135	50,444	51,000
Number of opportunities for residents to interact with elected officials (12 Fireside Chats, 16 1x10 events, 2 Town Halls)	NA	16	30	30

EFFECTIVENESS MEASURES

	2013-2014	2014-2015	2015-2016	2016-2017
Survey is conducted every other year.	Yes	No	Yes	No
Average rating on citizens' highest service priorities	8.5	8.5	8.5	8.5
Citizens rating overall city services as good or better	85%	0	93%	95%
Citizens who feel that Tigard will be a better place to live and work in the future	85%	0	85%	85%
Citizens rating overall city services as good or better	87%	0	87%	87%
Citizens who say the city's long-term strategic vision represents their long-term vision (as measured in biennial survey)	49%*	0	55%	60%

\*average of phone & web responses

FULL-TIME EQUIVALENT POSITIONS

FUND: 100  
General Fund

# City of Tigard, Oregon

DIVISION: 0500  
Mayor and Council

FY 2014	FY 2015	YTD 2016	Revised 2016	Budget Resource Summary	Requested 2017	Assumptions	Chg Pkg	
					0			Approved
					1,980	iPad data package for Mayor Cook, Councilor Woodard and Henderson. Surface Pro Tablet for Council Pres. Snider & Councilor Goodhouse (\$33 mo) Included in stipend for technology	.Base	Approved
					68,805	Mayor Stipend, \$45, 285 and Councilor annual Stipend \$5,880.	Existing Staff Alloc	Approved
					16,500	vehicle stipend for Mayor and each Councilor: \$275/month per Resolution #15-26	.Base	Approved
84,971	85,413	29,699	113,694	<b>51001 - Salaries - Management</b>	87,285	<b>Approved only</b>		
84,971	85,413	29,699	113,694	<b>Total Personal Services - Salaries</b>	<b>87,285</b>			

FUND: 100  
General Fund

# City of Tigard, Oregon

DIVISION: 0500  
Mayor and Council

FY 2014	FY 2015	YTD 2016	Revised 2016	Budget Resource Summary	Requested 2017	Assumptions	Chg Pkg
					0		Approved
					97		Existing Staff Alloc
1,185	997	149	480	<b>52001 - Unemployment</b>	97	Approved only	Approved
					0		Approved
					267		Existing Staff Alloc
507	585	183	221	<b>52002 - Worker's Compensation</b>	267	Approved only	Approved
					0		Approved
					7,364		Existing Staff Alloc
6,620	6,279	2,064	7,288	<b>52003 - Social Security/Medicare</b>	7,364	Approved only	Approved
					696		Existing Staff Alloc
					0		Approved
611	617	215	690	<b>52004 - Tri-Met Tax</b>	696	Approved only	Approved
					0		Approved
0	0	0	266	<b>52005 - Retirement</b>	0	Approved only	Approved
					66,721		Existing Staff Alloc
					0		Approved
42,176	51,550	21,209	63,235	<b>52010 - Medical/Dental/Vision</b>	66,721	Approved only	Approved
					0		Approved
5,178	6,522	2,721	0	<b>52011 - Dental Benefits</b>	0	Approved only	Approved
56,277	66,550	26,541	72,180	<b>Total Personal Services - Benefits</b>	<b>75,145</b>		
					0		Approved
					800	meeting supplies (cups, coffee, filters, clorox wipes, plates) paper, pens, etc.	.Base
93	182	152	800	<b>53001 - Office Supplies</b>	800	Approved only	Approved
93	182	152	800	<b>Total Supplies</b>	<b>800</b>		

# City of Tigard, Oregon

FY 2014	FY 2015	YTD 2016	Revised 2016	Budget Resource Summary	Requested 2017	Assumptions	Chg Pkg	
					0			Approved
					6,500	Consultant fee for Council training	.Base	Approved
					400	Interpreter Services for hearing impaired at Council meetings (upon request)	.Base	Approved
					850	Photographer for Council group photo	.Base	Approved
					2,640	TVCTV taping of Council workshop meetings	.Base	Approved
9,974	13,766	2,220	9,540	<b>54001 - Professional/Contractual Services</b>	10,390	<b>Approved only</b>		
					0			Approved
					27,651	City Attorney legal support for Council - based on trends	.Base	Approved
21,310	29,023	7,509	27,651	<b>54003 - Legal Fees</b>	27,651	<b>Approved only</b>		
					0			Approved
0	0	17	0	<b>54114 - R &amp; M - Office Equipment</b>	0	<b>Approved only</b>		
					0			Approved
					25	Council's use of pool vehicles for close-in travel.	.Base	Approved
0	0	0	25	<b>54115 - Vehicle Usage</b>	25	<b>Approved only</b>		
					0			Approved
1,815	3,451	600	0	<b>54205 - Utilites - Phone/Pager/Cells</b>	0	<b>Approved only</b>		
					0			Approved
0	450	0	0	<b>54300 - Advertising &amp; Publicity</b>	0	<b>Approved only</b>		
					0			Approved
					32,086	League of Oregon Cities membership (based on what we paid LOC for 2015/16 dues)	.Base	Approved
					4,467	National League of Cities membership (NLC dues are population based, cities over 50,000 pay \$4467)	.Base	Approved
					800	Oregon Ethics Commission filing dues	.Base	Approved
					188	Oregon Mayors Assn dues for Mayor Cook (population based)	.Base	Approved
					100	Other publications for Councilors	.Base	Approved
					120	Tigard Downtown Alliance dues	.Base	Approved
					3,489	U.S. Conference of Mayors membership	.Base	Approved
					2,500	Vision Action Network membership (Action Member status)	.Base	Approved
					5,044	Westside Economic Alliance membership (Based on billing from July 2015)	.Base	Approved

FUND: 100  
General Fund

# City of Tigard, Oregon

DIVISION: 0500  
Mayor and Council

FY 2014	FY 2015	YTD 2016	Revised 2016	Budget Resource Summary	Requested 2017	Assumptions	Chg Pkg
39,059	43,782	37,130	50,234	54302 - Dues & Subscriptions	48,794	Approved only	
					0		Approved
					1,100	Business meals that are outside regular council meetings (Mayor only) (WEA forums, meetings with Metro and other jurisdictions, regional Mayor's dinner)	.Base Approved
					1,400	Council meals before regularly scheduled Council meetings	.Base Approved
					28,000	Councilors training budget - \$7,000 per councilor	.Base Approved
					12,600	Mayor's training budget for conferences and meetings	.Base Approved
					300	New Councilor/swearing in event	.Base Approved
					10,000	Tigard Youth Advisory - Washington DC, sending 2 youth plus chaperone	.Base Approved
25,338	27,367	10,291	43,100	54303 - Travel and Training	53,400	Approved only	
					0		Approved
					800	Mayor and City Councilor clothing with city logo & name embroidery	. Approved
					600	Recognition, awards, florist (funeral, illness) from Council. Promotional items for visiting dignitaries and school age visitors.	.Base Approved
					5,000	State of the City Reception	.Base Approved
1,909	1,525	410	5,600	54311 - Special Department Expenses	6,400	Approved only	
99,405	119,364	58,177	136,150	<b>Total Services</b>	<b>146,660</b>		
<b>240,746</b>	<b>271,509</b>	<b>114,569</b>	<b>322,824</b>	<b>Total Requirements</b>	<b>309,890</b>		
<b>240,746</b>	<b>271,509</b>	<b>114,569</b>	<b>322,824</b>	<b>Total Mayor and Council</b>	<b>309,890</b>		