



Sherwood West

Preliminary Concept Plan

A long range look at our future.

URBAN GROWTH MANAGEMENT DECISION

CITY COUNCIL

MARCH 20TH, 2018

Purpose

- Background of Urban Reserves and Urban Growth Boundary
- Review Sherwood West Preliminary Concept Plan
- Review analysis from area identified for letter of interest
- Review potential alternatives for smaller ask
- Discussion

Background

Pre-reserves – Metro was required by state law to consider soil quality above everything else. The system provided a way to decide where *not* to develop. While protecting high quality farm soils is important, the system didn't provide a method for determining ideal locations and conditions for developing urban communities.

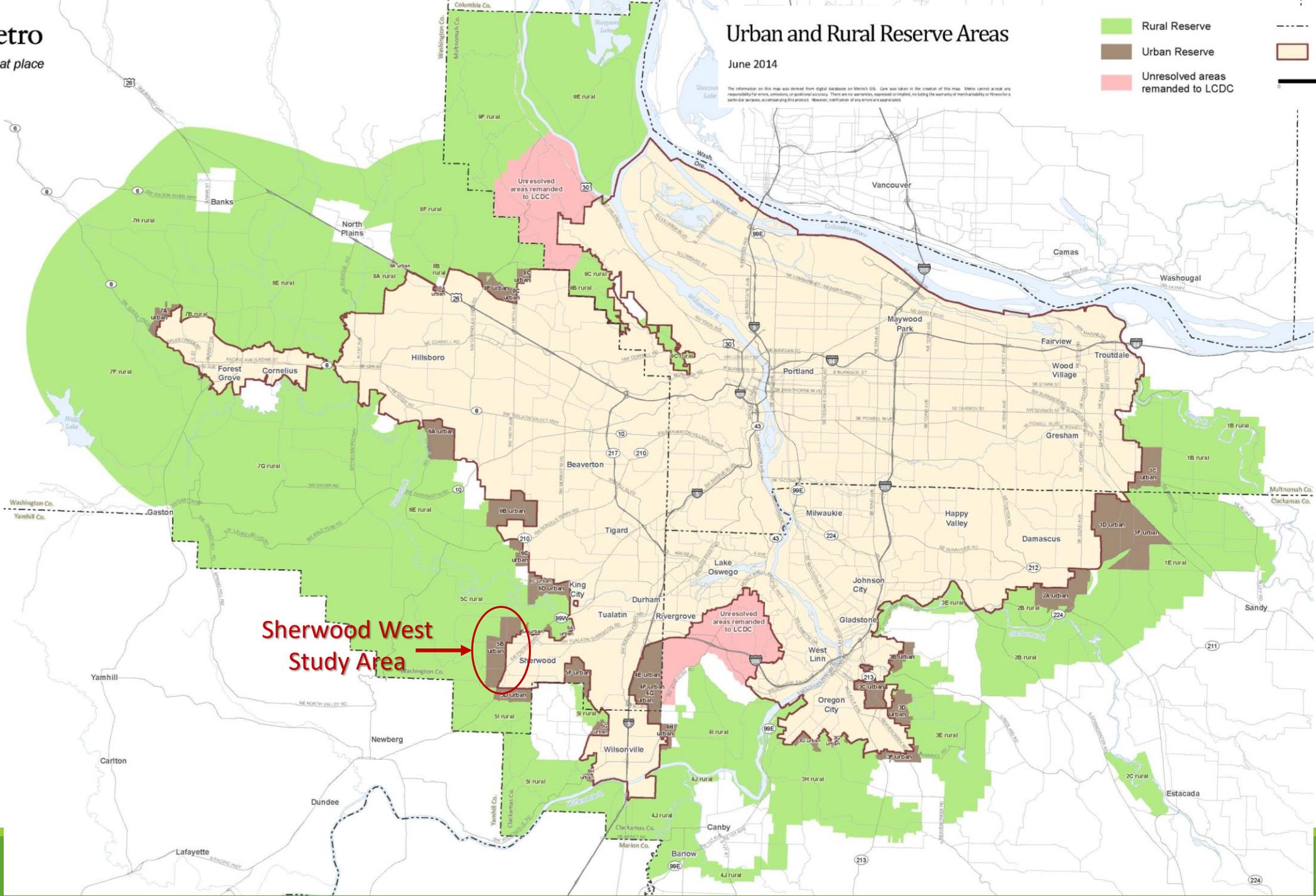
- 2002 – Metro added 18,867 acres to UGB for housing and jobs
- 2007 – State legislature passes SB 1011 establishing a process for designating urban and rural reserves
- 2008-2010 – Metro, Counties and local jurisdictions work together to identify locations for urban and rural reserves
- 2011 –
 - Urban and rural reserves acknowledged for Washington County
 - Metro added 2,015 acres to UGB for housing and jobs;
 - **Sherwood advocated for 276 acres in the Sherwood West UGB but Metro did not include it**
- 2014 – City applied for and received funds from Metro to develop Sherwood West preliminary concept plan
- 2015 – Metro prepared UGR and determined no UGB expansion needed; Commits to look again in 3 years
- 2016 – Sherwood West preliminary concept plan accepted by Council
- 2017 –
 - Metro and local mayors discuss framework for a mid-cycle review of the UGB to meet local needs; 3 year mid-cycle path developed.
 - Metro lays out timeline for 2018 UGB decision; NOT mid-cycle decision

Urban and Rural Reserve Areas

June 2014

The information on this map was derived from digital databases on Metro's GIS. Care was taken in the creation of this map. Metro cannot accept any responsibility for errors, omissions, or positional accuracy. There are no warranties, expressed or implied, including the warranty of merchantability or fitness for a particular purpose, accompanying this product. However, notification of any errors are appreciated.

-  Rural Reserve
 -  Urban Reserve
 -  Unresolved areas remanded to LCDC
 -  County Boundaries
 -  Urban growth boundary
- 0 2.5 5 Miles



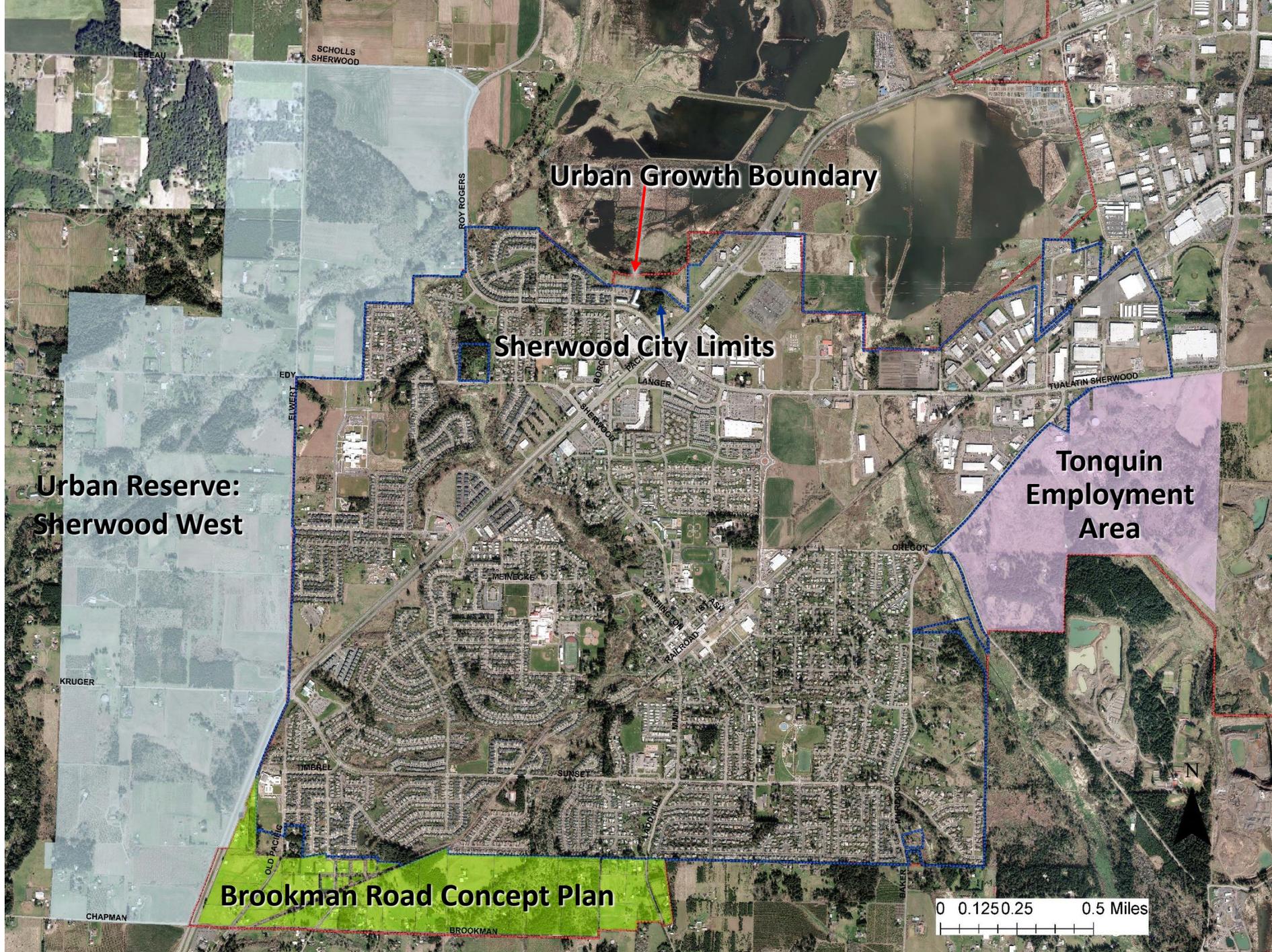
Sherwood West Study Area

Context

- City Limits vs. Urban Growth Boundary
- Urban Reserves
- Annexation Process

Goals

- 50 year look at how and where future development *could* occur
- Roadmap to inform possible future UGB expansion decisions



Sherwood West Preliminary Concept Plan

CITY COUNCIL ACCEPTED BY RESOLUTION 2016-009

FEBRUARY 16, 2016

Vision Statement

“Sherwood West complements the City’s form and small town character through an integrated and continued pattern of the community’s most valued neighborhoods. Through a range of well-designed housing options and protected natural areas, Sherwood West is a great place for families.

It helps satisfy the City’s need for well-planned growth and other community needs. Designed as a complete community, development is orderly, attractive and protects views. The area is well administered and development contributes to the fiscal health of Sherwood.”



Project Website

E-Newsletter Subscription & Social Media

Project Video

Property Owner Meetings (March-April)

Community Workshop (May)

Community Survey – Vision and Values (May-June)

Ice Cream Social & Open House June 2015

Community Survey – Draft Alternatives (July-August)

Music on the Green (July-August)

Movies in the Park (August)

Sherwood Charter School

Sherwood Rotary

Chamber of Commerce

Community Survey – Final Preferred Alternative (October)

Community Open House (October)

COMMUNITY ENGAGEMENT EVENTS

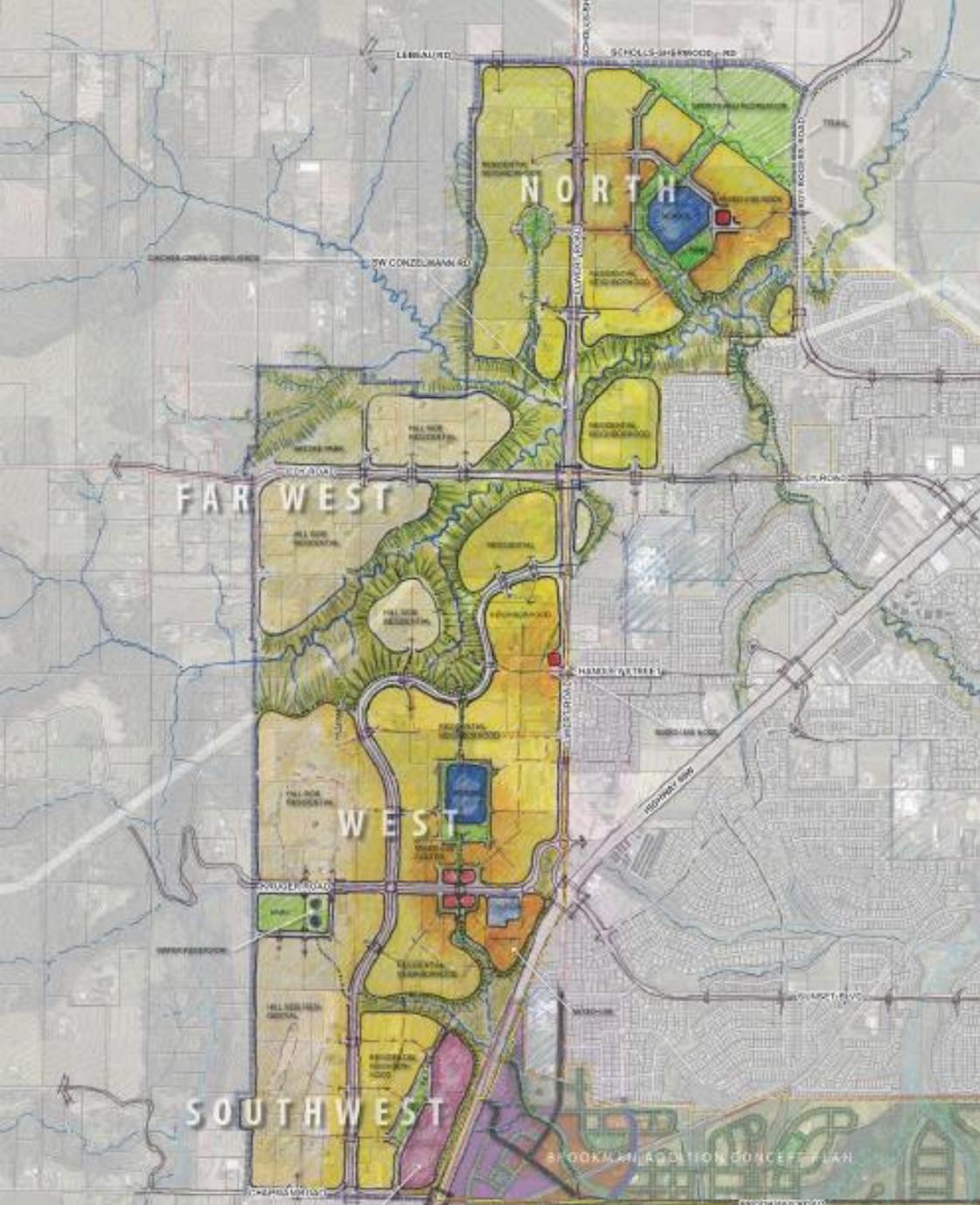
GOAL	EVALUATION CRITERIA
Growth is well-planned	<ul style="list-style-type: none"> • Neighborhoods are phased adjacent to existing development • Well-phased extension of services • Connectivity
Design includes complete community attributes	<ul style="list-style-type: none"> • Incorporates nature • Neighborhood retail • Provides amenities that cannot be located in existing Sherwood
Development respects and recognizes Sherwood pattern, heritage, and small-town feel	<ul style="list-style-type: none"> • Walkable • Integrates with existing Sherwood • View corridors, natural features retained
Concepts promote health	<ul style="list-style-type: none"> • Walking, bicycling easy to access • Access to transportation choice, transit
Development protects and provides access to nature	<ul style="list-style-type: none"> • View corridor, other assets protected • Walking trails along heritage resources
Implementation is pragmatic	<ul style="list-style-type: none"> • Options minimize cost of infrastructure • Balance of benefits and burdens of development

High: Outstanding performance. Plan goes above and beyond the evaluation criteria to meet the goal.

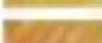
Medium: Good performance. Plan meets the criteria but may need more work to meet the goal.

PLAN ATTRIBUTES

- 10 minute neighborhood
- Resource protection
- Access to nature - trails
- Schools
- Neighborhood serving retail



LEGEND

-  RESIDENTIAL - HILLSIDE
-  RESIDENTIAL - NEIGHBORHOOD
-  RESIDENTIAL - NEIGHBORHOOD
-  RESIDENTIAL - MIXED-USE
-  MIXED USE COMMERCIAL
-  GATEWAY DISTRICT
-  SCHOOL
-  CHURCH
-  PARK/OPEN SPACE
-  CREEK CORRIDOR OPEN SPACE
-  TRAIL



PREFERRED PLAN, Option 2



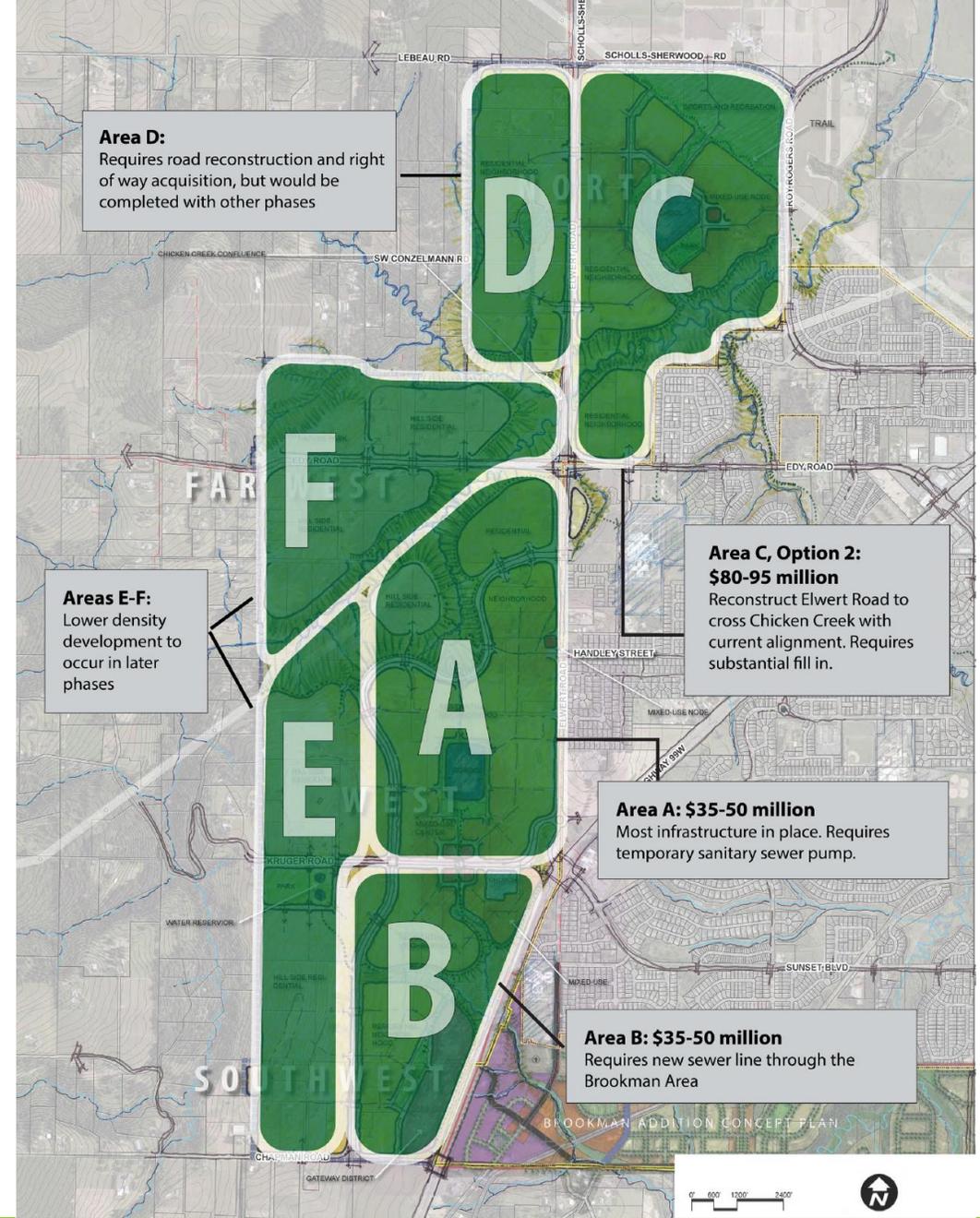
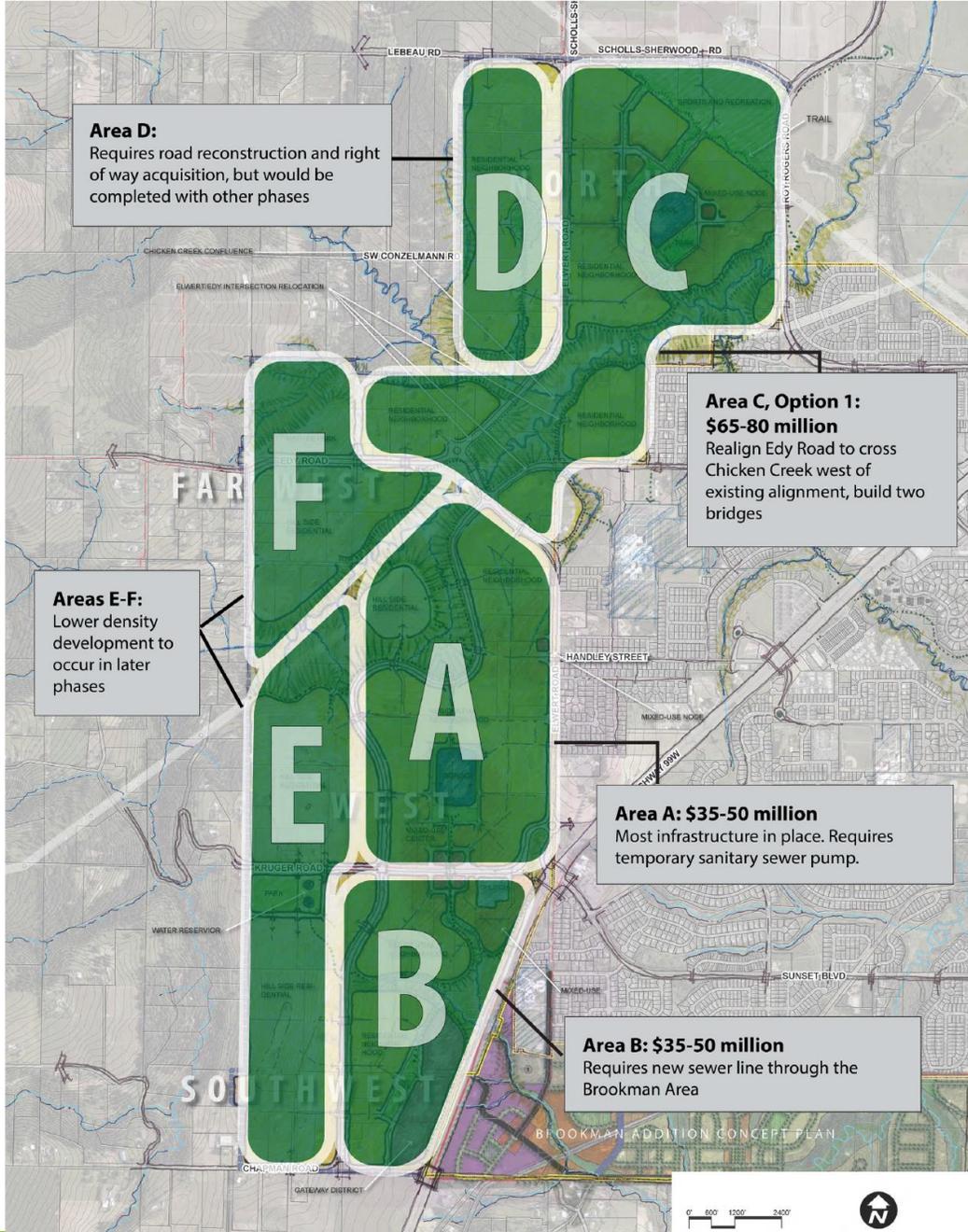
Transportation
(Roads, ROW, other traffic elements)

Storm, Sanitary, Water

Parks
(Trails and resource lands)

Schools

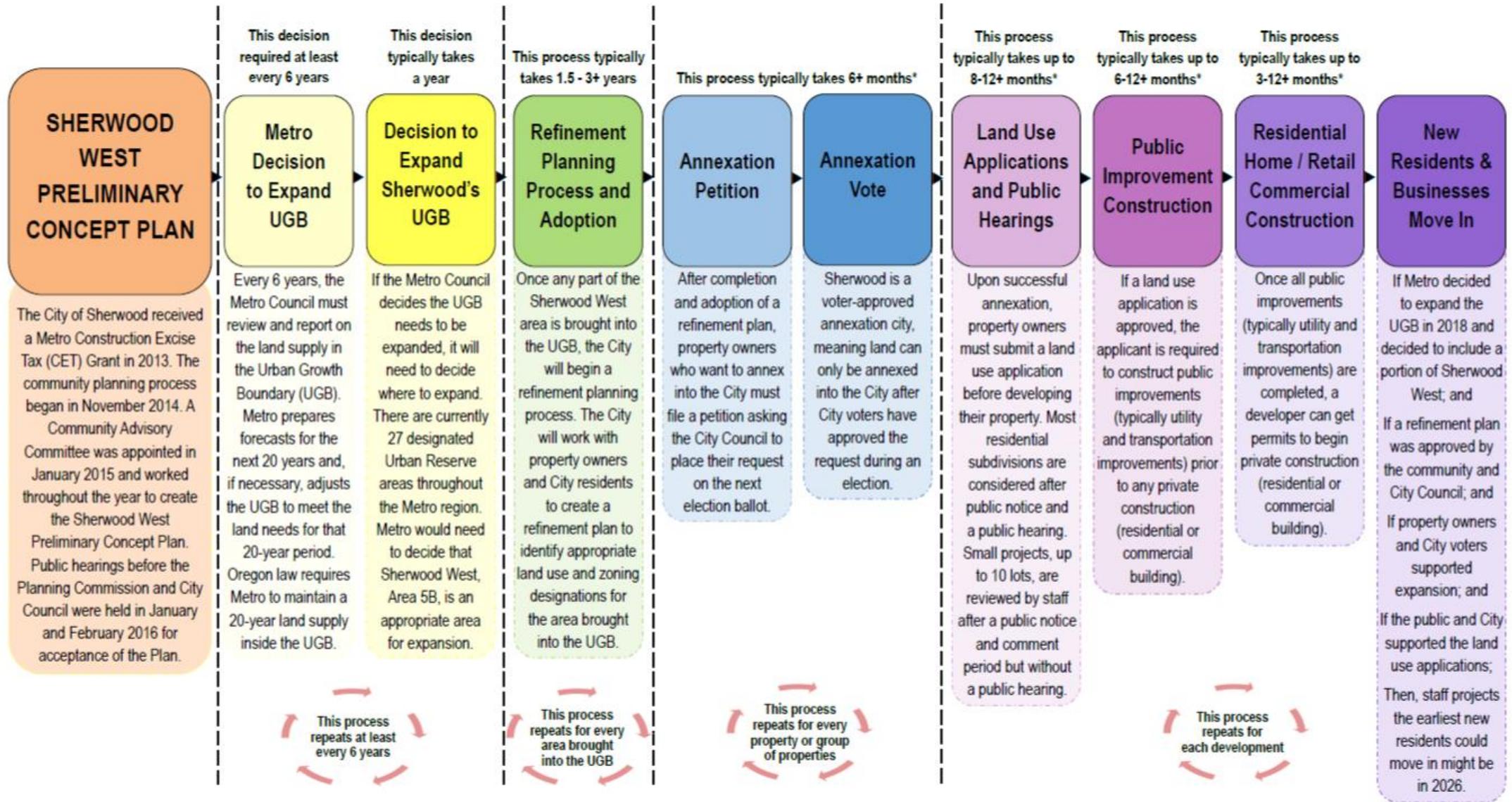




Conceptual Phasing, Option 1

Conceptual Phasing, Option 2

POTENTIAL SHERWOOD WEST PLANNING AND DEVELOPMENT PROCESS 2015-2065



* Estimated time is measured the day applications are made to the City and include City and requisite public and agency review, decisions, and implementation (or construction). The time it takes an applicant to develop plans is EXCLUDED.

URBAN GROWTH MANAGEMENT DECISION 2018

HOW DO WE WANT TO GROW IN THE METRO REGION?

Urban Growth Report

Oregon law requires that every six years the Metro Council evaluate the capacity of the Portland region's urban growth boundary to accommodate a 20-year forecast of housing needs and employment growth. That evaluation results in the Urban Growth Report. The last UGR was adopted in 2015.

Given the potential for changing circumstances ahead as the region climbs further out of the Great Recession, the **council directed staff to update the Urban Growth Report before the end of 2018**. The reforms proposed by the Metro's regional task force, and adopted by the state legislature, made major changes to the Metro's urban growth management process.



Urban Growth Decision Timeline

Dec. 29, 2017: Deadline for cities to submit letters of interest for growth boundary expansion proposals into adjacent urban reserves

May 2018: Cities submit full proposals

June 2018: Metro releases Urban Growth Report, with analysis of the existing growth boundary, growth trends and expansion options

Fall 2018: Metro Council decision on growth boundary expansion

When is the next Urban Growth Management Decision?

The next legally mandated urban growth look would be **2024**

- Urban Growth Report
- Urban Growth Boundary decision based on regional need

In **2021**, Metro will consider the adjustments to the urban growth boundary midway through the 6-year review cycle without needing to do a full urban growth report.

- Metro could make smaller adjustments – up to 900 acres total – to the urban growth boundary.
- This would allow the Metro council to help cities that had a “stars are aligned” opportunity for new housing developments within the region’s urban reserves without waiting the full six years for permission to build.

Why are we considering an expansion?

- We know it takes a long time to plan and see development once inside the UGB
- Historic growth rates predict we could be out of developable land in 4-10 years
- Lack of available land results in:
 - Increase home prices
 - Lack of attainable housing for differing income levels
 - Increased pressure to up-zone/re-zone
 - More likelihood of tear down to infill on older lots
 - More infill
 - Fewer choices
- Opportunity due to Metro 2018 UGR/UGB decision

Input sought on whether, how much and where to ask

Open house 10/25

- Facebook notice/event
- Twitter notice
- Website update
- Individual mailed invitation to all property owners in Sherwood West
- E-notice to Sherwood West and Comprehensive Plan interested parties list

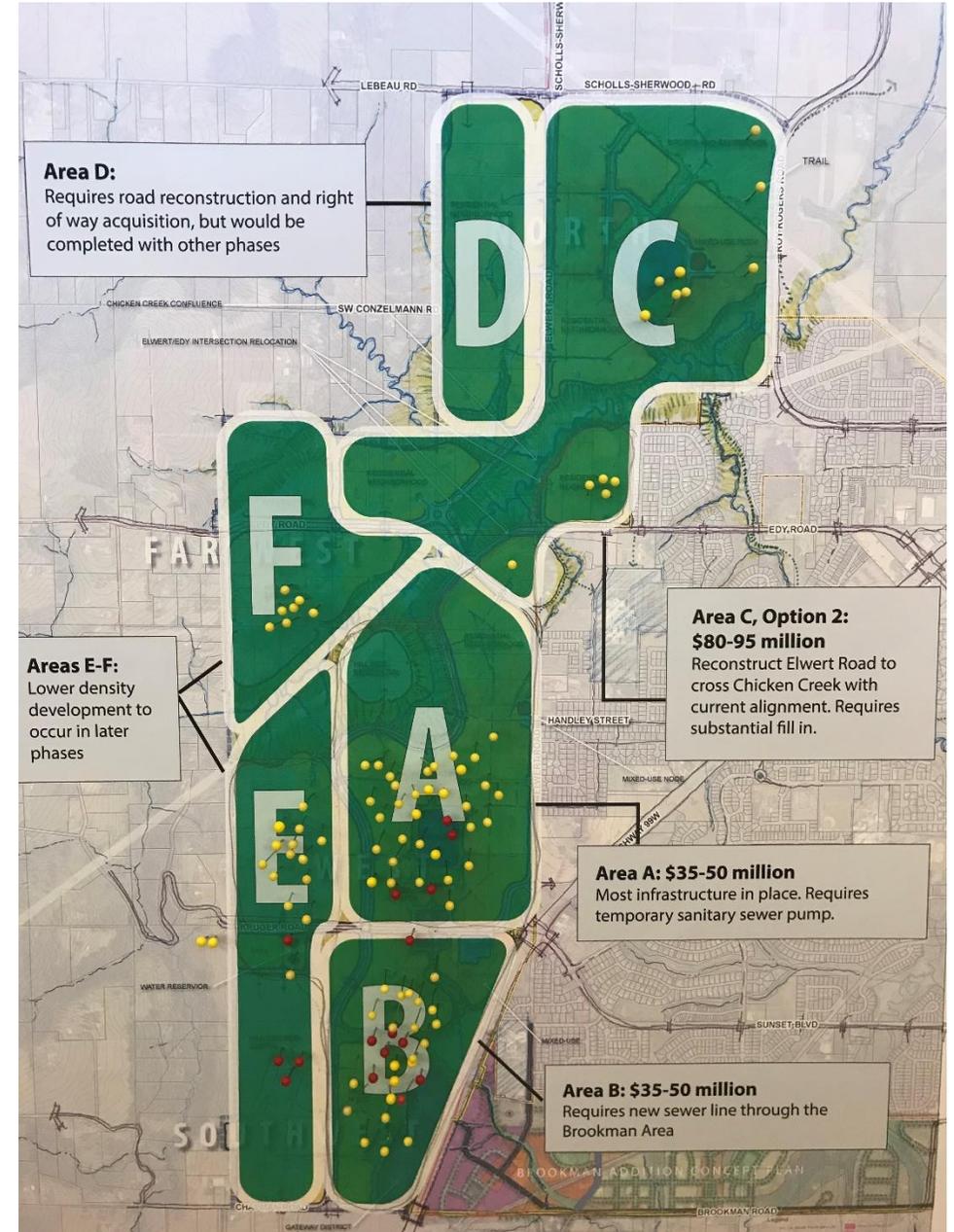
85 + people in attendance

67 written comments received



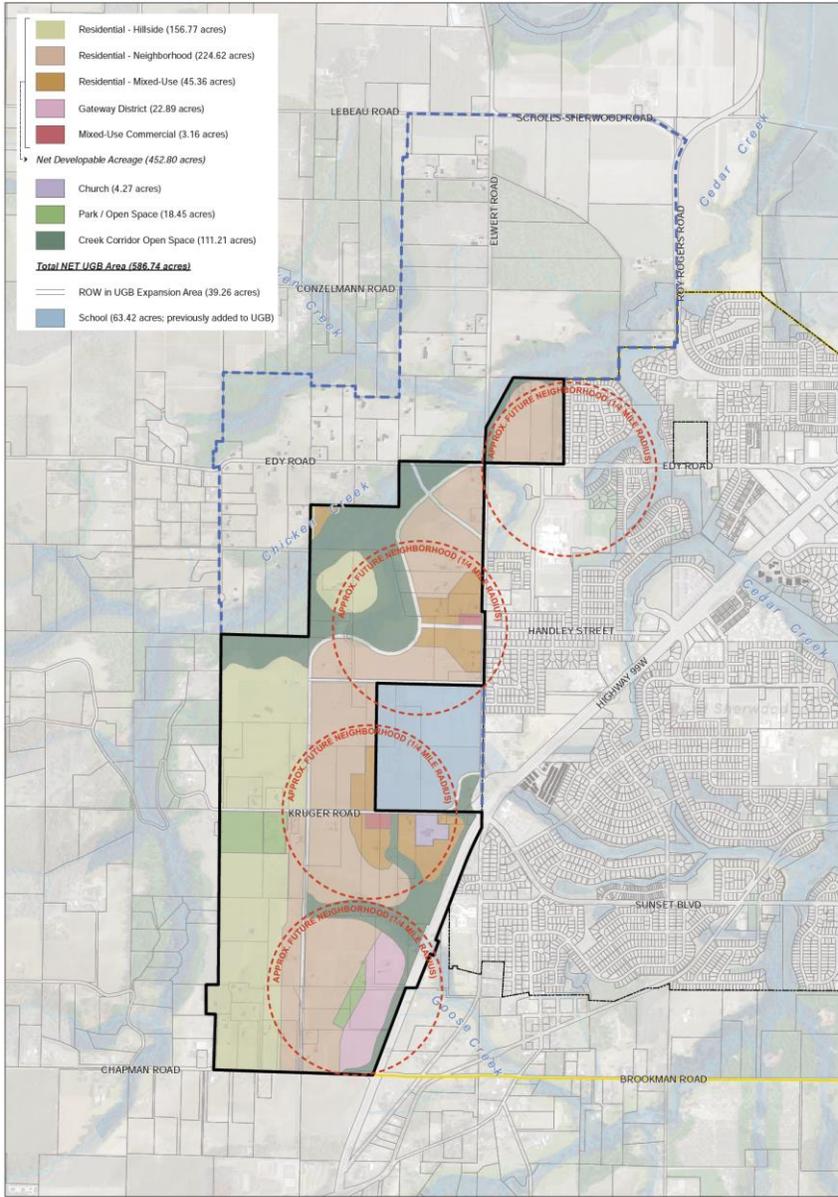
What we heard...

- Growth should be focused around the new high school
- Growth should be focused in areas most readily served with infrastructure
- There are many interested property owners in Phases A and B and portions of C that are requesting to be brought into the UGB
- There is heavy concern the impact of the expansion of the UGB will have to Elwert and Edy Roads and the Elwert/Edy intersection in regards to safety and traffic
- There is concern about the impact of growth on Sherwood's "small town" feel, schools and overall traffic



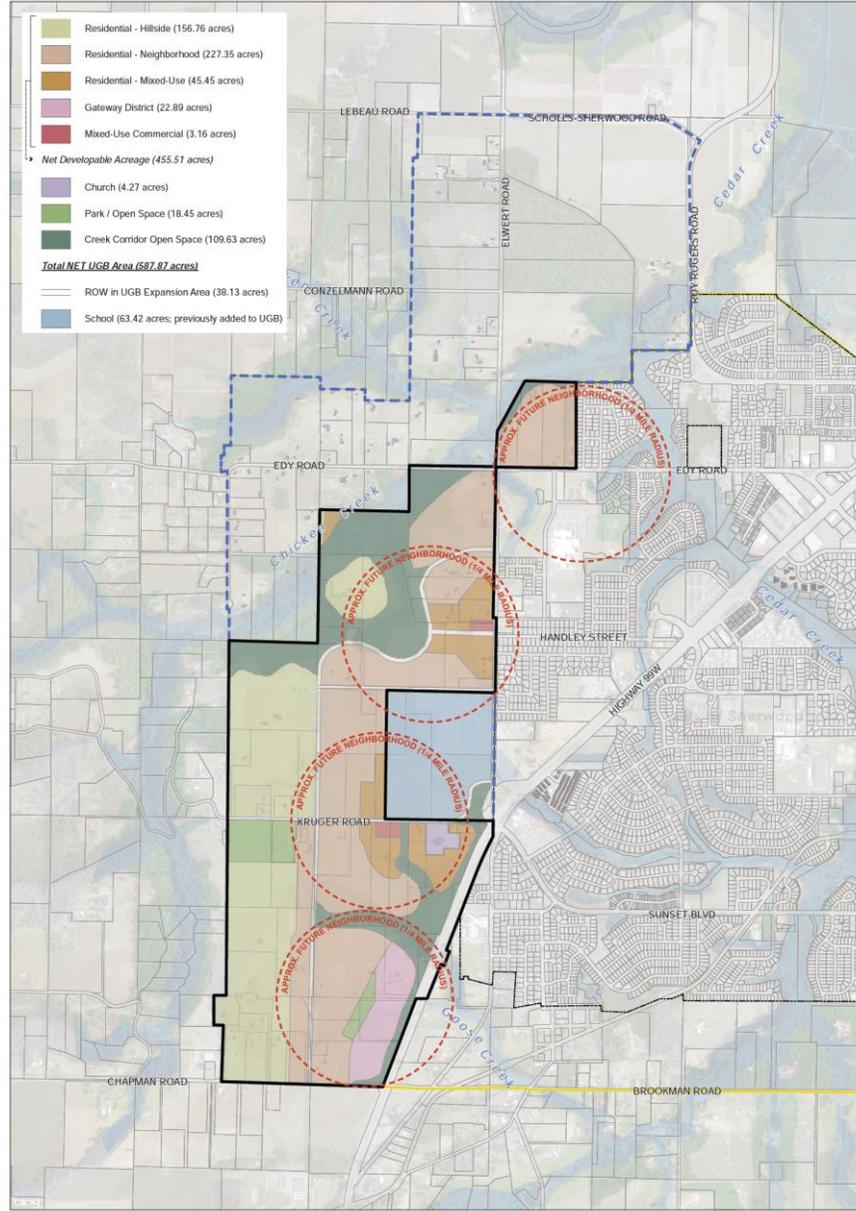
Letter of Interest

- From the input received, planning staff prepared a recommendation for the City Council which included a map showing the recommend expansion area in Sherwood West.
- The City Council held a work session on November 7, 2017 where they modified staff's recommendation for the proposed expansion area and directed staff to proceed with the Letter of Interest to Metro.
- The proposed area of expansion underwent minor modifications based off of additional citizen and property owner comment and City Council direction in early December.



- Proposed UGB Expansion
- Sherwood West Study Area
- Existing UGB
- City of Sherwood Boundary

**Draft Proposed Sherwood West Urban Growth Boundary Expansion:
Option 1 - Area Calculations (626 Gross Acres)**



- Proposed UGB Expansion
- Sherwood West Study Area
- Existing UGB
- City of Sherwood Boundary

**Draft Proposed Sherwood West Urban Growth Boundary Expansion:
Option 2 - Area Calculations (626 Gross Acres)**

Caveat slide

No zoning identified or assumed!!

- Average of approximately 8.5 homes per acre; but different areas have different number of units assumed

Assumptions made based on descriptions in Sherwood West Preliminary Concept Plan

- Informed SDC estimates
- Informed dwelling unit/commercial square footage estimates
- Informed annual tax revenue estimates

Capital costs are high level and best professional judgement

Details will be refined when additional planning is completed once inside the UGB

Estimates are only to provide comparative analysis

Letter of Interest Proposed Expansion Area

Estimated Capital Costs

Public Facility	Option 1 Capital Costs	Option 2 Capital Costs
Water	\$6,132,000	\$9,510,500
Sanitary Sewer	\$6,195,155	\$6,195,155
Stormwater	\$4,717,820	\$4,717,820
Parks*	\$16,804,976	\$16,804,976
Transportation**	\$54,418,826	\$84,272,263
Other (fees/planning)	\$4,707,671	\$6,828,858
Construction Contingency (30% of construction costs)	\$20,765,757	\$30,735,338
Total	\$113,742,205	\$159,064,910

*Note: Includes land acquisition costs and trails-related costs

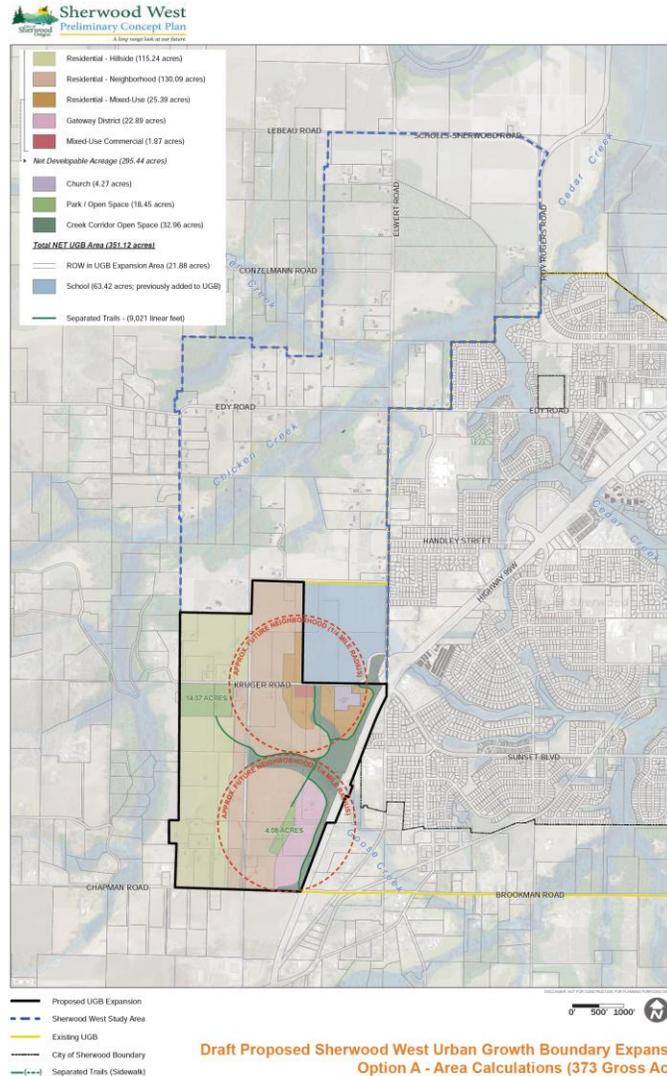
**Note: Includes all costs for site preparation, including land acquisition

Construction cost estimating for providing public infrastructure for roads, public utilities mainlines to area within UGB expansion area request. Includes, the construction of **two** parks (one neighborhood, one community) and separated hard surface multi-use trails. Option 1 reconstructs Elwert/Edy intersection as a relocated roundabout with bridges crossing stream corridor. Option 2 reconstructs Elwert/Edy intersection as an elevated roadway crossing regulated wetlands. Estimates include land and ROW acquisition costs and site preparation costs.

ALTERNATIVES

COSTS, REVENUES, FUNDING GAPS

Alternative A Proposed Expansion Area



Total Acreage: 373 acres

Net Developable Acreage: 295 acres

Estimated Dwelling Units: 2,800

Estimated Commercial: 86,500 square feet

\$17.7 million in taxes to all taxing districts

\$86 million in SDC revenues

Alternative A Proposed Expansion Area

Estimated Capital Costs

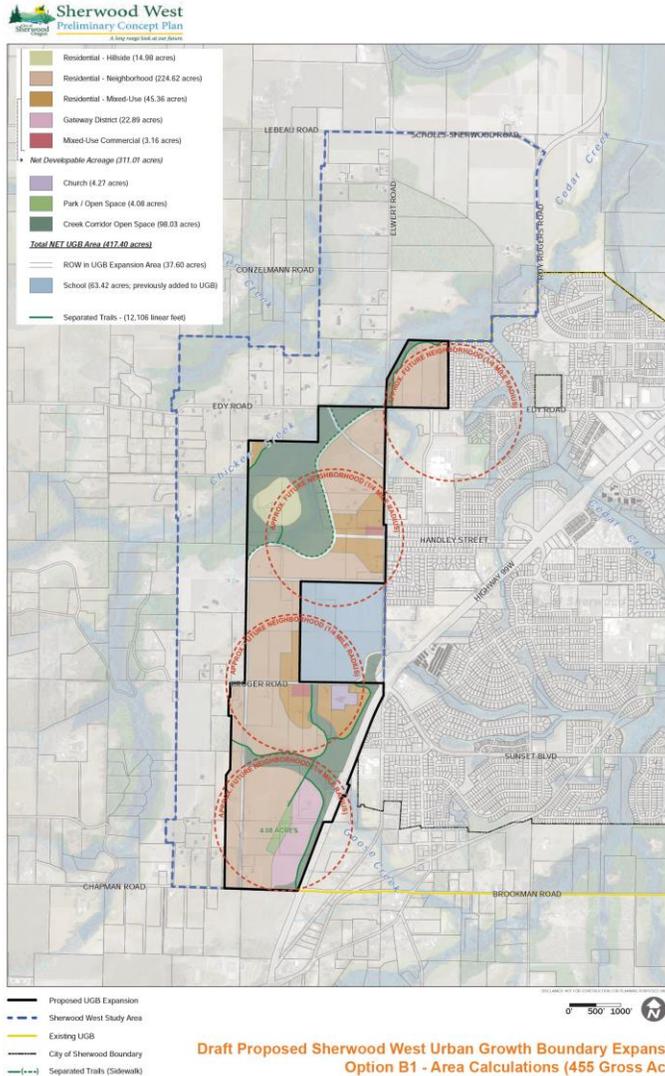
Public Facility	Option A1 Capital Costs	Option A2 Capital Costs
Water	\$2,821,250	\$2,821,250
Sanitary Sewer	\$2,651,125	\$2,651,125
Stormwater	\$3,907,540	\$3,836,817
Parks*	\$4,546,798	\$4,546,798
Transportation**	\$48,839,731	\$81,223,532
Other (fees/planning)	\$4,642,789	\$6,789,954
Construction Contingency (30% of construction costs)	\$19,935,189	\$28,523,856
Total	\$87,344,422	\$130,393,332

*Note: Includes land acquisition costs and trails-related costs

**Note: Includes all costs for site preparation, including land acquisition

Description: The estimate includes construction costs of public infrastructure (Storm Drainage, Sanitary Sewer, Water and Streets). Includes costs for **one** neighborhood park and multi-use trails. Re-construction of Elwert Road through the Elwert Road/Edy Road intersection is seen as a requirement of the proposed UGB defined area development. In Option A1, Elwert Road is realigned to bypass the existing road alignment, installation of two bridges for crossing the wetlands, and sized for meeting future needs of overall development area. In Option A2, Elwert Road is reconstructed to follow the existing road alignment, elevated for crossing the wetlands, and sized for meeting future needs of overall development area.

Alternative B Proposed Expansion Area



Total Acreage: 455 acres

Net Developable Acreage: 314 acres

Estimated Dwelling Units: 2,100

Estimated Commercial: 97,500 square feet

\$10.2 million in taxes to all taxing districts

\$61 million in SDC revenues

Alternative B Proposed Expansion Area

Estimated Costs

Public Facility	Option B1 Capital Costs	Option B2 Capital Costs
Water	\$3,792,500	\$3,792,500
Sanitary Sewer	\$2,651,125	\$2,651,125
Stormwater	\$3,907,540	\$4,471,367
Parks*	\$5,681,110	\$5,681,110
Transportation**	\$66,097,351	\$96,418,391
Other (fees/planning)	\$5,456,181	\$7,597,393
Construction Contingency (30% of construction costs)	\$23,529,057	\$32,093,905
Total	\$111,114,864	\$152,705,791

*Note: Includes land acquisition costs and trails-related costs

**Note: Includes all costs for site preparation, including land acquisition

Description: The estimate includes construction costs of public infrastructure (Storm Drainage, Sanitary Sewer, Water and Streets). Includes costs for **one** neighborhood park and multi-use trails. Re-construction of Elwert Road through the Elwert Road/Edy Road intersection is seen as a requirement of the proposed UGB defined area development. In Option A1, Elwert Road is realigned to bypass the existing road alignment, installation of two bridges for crossing the wetlands, and sized for meeting future needs of overall development area. In Option A2, Elwert Road is reconstructed to follow the existing road alignment, elevated for crossing the wetlands, and sized for meeting future needs of overall development area.

Capital Cost Comparisons

	Capital Costs	
	Option 1	Option 2
Letter of Intent	\$113,742,205	\$159,064,910
Alternative A	\$87,344,422	\$130,393,332
Alternative B	\$111,114,864	\$152,705,791

Funding Strategies

In addition to Citywide established System Development Charges (SDC)

- Increase Citywide SDC rates
- Apply a sole source SDC in Sherwood West
- Consider local improvement district, reimbursement district, or other kinds of public-private partnership
- Consider local improvement districts (LIDs)
- Consider developer-build approaches
- Consider a financial management approach
- Find opportunities to reduce infrastructure costs
- Provide general fund contributions
- Apply for state or grant funding

Comparison of Costs, SDC Revenues and Funding Gaps

	Capital Costs		Potential SDC Revenue at Build-Out	Potential Funding Gaps	
	Option 1	Option 2		Option 1	Option 2
Letter of Intent	\$113,742,205	\$159,064,910	\$110,253,924	\$3,488,281	\$48,810,986
Alternative A	\$87,344,422	\$130,393,332	\$85,975,506	\$1,368,916	\$44,417,826
Alternative B	\$111,114,864	\$152,705,791	\$61,117,256	\$49,997,608	\$91,588,535

Comparison of Estimated Annual Tax Revenues

<i>Estimate</i>	<i>Estimate</i>	<i>Estimate</i>	<i>Estimate</i>	<i>Estimate</i>	<i>Estimate</i>
	Net acres	Estimated DU	Estimated Pop	Estimated commercial sq. ft	total taxes
Full area	455.51	3770	9576	97500	\$ 21,918,047.80
Alternative A	294.44	2883	7323	86500	\$ 17,691,279.05
Alternative B	313.76	2132	5415	97500	\$ 10,271,882.44

Comparison of Estimated Tax Revenues

	<i>Estimate</i>	<i>Estimate</i>	<i>Estimate</i>	<i>Estimate</i>	<i>Estimate</i>	<i>Estimate</i>
	Sherwood School tax revenues	Sherwood School Bond tax revenues	TVFR revenues	TVFR bond revenues	Combined Sherwood and URA revenues	Sherwood Bond revenues
Full area	\$ 3,982,806.13	\$ 3,584,228.26	\$ 1,683,048.00	\$ 84,700.15	\$ 4,636,544.39	\$ 139,121.47
Alternative A	\$ 3,214,744.76	\$ 2,893,028.99	\$ 1,358,482.85	\$ 68,366.25	\$ 3,742,413.68	\$ 112,294.70
Alternative B	\$ 1,866,540.54	\$ 1,679,749.88	\$ 788,757.64	\$ 39,695.20	\$ 2,172,913.77	\$ 65,195.26

How do we control growth?

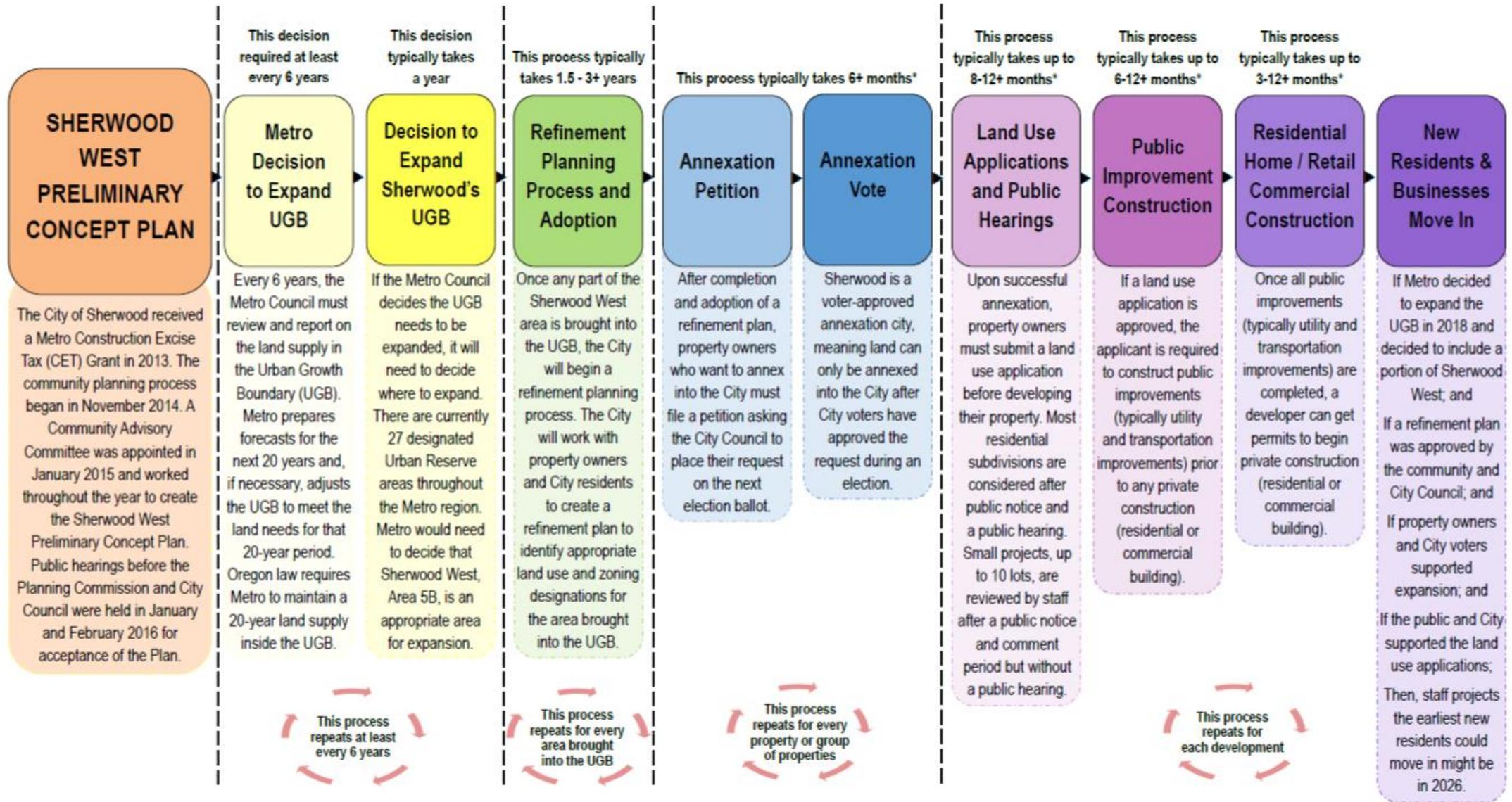
Through careful planning!

Development of the comprehensive plan and zoning for this area 2-3 years+

- Phasing
- Overlay/design standards
- Annexation criteria
- Funding

Annexation criteria to ensure adequate planning and funding prior to annexation

POTENTIAL SHERWOOD WEST PLANNING AND DEVELOPMENT PROCESS 2015-2065



* Estimated time is measured the day applications are made to the City and include City and requisite public and agency review, decisions, and implementation (or construction). The time it takes an applicant to develop plans is EXCLUDED.

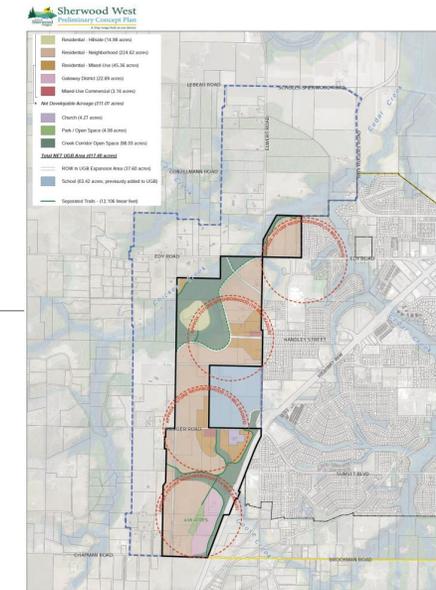
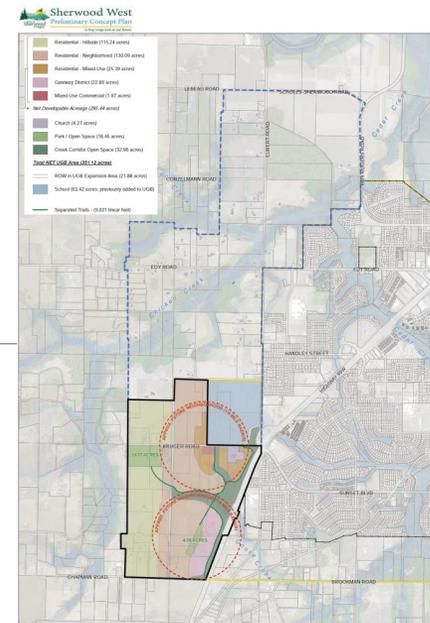
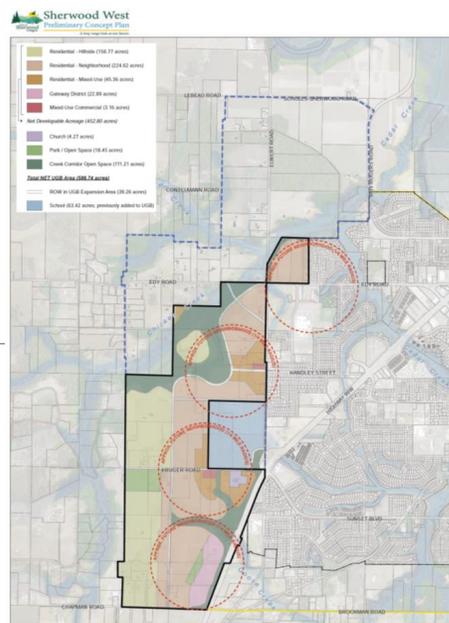
Next Steps and Council Decisions

City Council Actions:

- Ordinance to adopt the Housing Needs Analysis (HNA) and associated Comprehensive Plan text amendment (March 20th, April 3rd)
- Resolution accepting the Sherwood West Refinement Plan/Title 11 Report (May 2nd)
- Resolution supporting the City's UGB expansion proposal (May 2nd)
- Resolution supporting an IGA with Washington County for 'Transportation Planning in Proposed Urban Growth Boundary Expansion Areas' (May 2nd)

Metro Actions:

- Metro preliminary Urban Growth Management decision – September 2018
- Metro final Urban Growth Management decision – December 2018



	Letter of Interest	Alternative A	Alternative B
Net Dev. Acres	455	295	314
Homes	3700	2800	2100
Commercial sq. ft	97500	86500	97500
Population	9576	7323	5415
SDC revenue	\$110 million	\$86 million	\$61 million
Capital costs	\$113-159 million	\$87-130 million	\$111-152 million
Funding gap	\$3.5-49 million (\$925-12,947/du)	\$1.4-44 million (\$474-15,406/du)	\$50-91.5 million (\$23,451-42,958/du)
Annual tax revenues	\$21,918,047	\$17,691,279	\$10,271,882

Council discussion and direction request

What does Council want to see brought forward for their May 2nd decision?

- Full area of original letter of interest
- Alternative A (south of High School)
- Alternative B (Eastern portion)
- No ask at this time