



Sherwood West Preliminary Concept Plan

A long range look at our future.

Technical Advisory Committee Meeting Packet

FOR

**September 17, 2015
3:30 – 5:00 PM**

**City of Sherwood
Community Room
22560 SW Pine Street
Sherwood, Oregon**



Sherwood West Preliminary Concept Plan

A long range look at our future.

**City of Sherwood
SHERWOOD WEST PRE-CONCEPT PLAN TECHNICAL ADVISORY COMMITTEE
City of Sherwood Community Room, City Hall
22560 SW Pine Street
Sherwood, OR 97140**

**September 17, 2015
3:30 – 5:00 PM**

AGENDA

- 1. Welcome and Announcements**
- 2. Agenda, Schedule, and Project Updates**
- 3. Alternatives Analysis Community Feedback**
- 4. Draft Hybrid Preliminary Concept Plan**
- 5. Implementation and Funding Tools**
- 6. Discussion**
- 7. Next Steps**
- 8. Adjourn**

*Meeting documents may be found online at www.sherwoodoregon.gov/sherwoodwest
or by contacting the Planning Department at 503-925-2308.*



Technical Advisory Committee
Meeting #5

September 17, 2015
3:30-5:00pm

Community Room, City Hall
22560 SW Pine Street
Sherwood, OR 97140

WORKING AGENDA

Time	Subject	Lead Presenter	TAC Action
3:30	Welcome, Announcements	Brad Kilby, Planning Manager	
3:35	Agenda, Meeting Objectives, Schedule and Project Updates	Kirstin Greene, Cogan Owens Greene	
3:40	Community Feedback	Anais Mathez, Cogan Owens Greene	
3:50	Draft Hybrid Preliminary Concept Plan	Martin Glastra van Loon, SERA Architects	
4:05	Implementation and Funding Tools	Lorelei Juntunun, ECONorthwest	
4:20	Discussion	Kirstin	Identify any needed changes
4:50	Closing Comments	All	
4:55	Next Steps	Brad	
5:00	Adjourn		

More at www.sherwoodoregon.gov/sherwoodwest.com

Thank you!



DRAFT MEETING SUMMARY

Members Present

Mike Dahlstrom
Captain Daniels (for Jeff Groth and Ty Hanlon)
Bob Galati
Stephanie Millar
Carrie Pak
Craig Sheldon
Kristen Switzer

Jon Wolfe

Members Absent

Seth Brumley
Erin Holmes
Keith Mays
Phil Johanson
Rob Fagliano
Allen Kennedy

Staff Present

Brad Kilby, Planning Manager
Kirstin Greene, Consultant Team
Martin Glastra van Loon, Consultant Team
Anais Mathez, Consultant Team

Conversation summarized by conversation or topic area.

Welcome/Announcements

Brad Kilby welcomed everyone to the meeting and noted the outreach efforts over the past month. He presented a pack of flyers for distribution and copies of the final existing conditions report.

Kirstin Greene, Cogan Owens Greene, conducted a round of introductions and reviewed the agenda, meeting purpose and project timeline.

Brad made two announcements:

- COO of Metro has made a recommendation to not move forward with any expansion. The recommendation is to move forward on another review of the UGB expansion.

- City Council meets on August 4 to discuss proposed annexation of Brookman. People may be more likely to support the annexation, though political will is uncertain.

Draft Alternatives

Kirstin introduced Martin Glastra van Loon, SERA Architects, for a presentation about the three draft alternative concepts. Martin began his presentation by reminding the group of Sherwood's unique landscape and indicated that each alternative was developed with this landform identity in mind.

Alternative A:

- The biggest move and most distinct feature is the transportation system. Elwert Road currently runs straight. Alternative A entertains an idea that came from the CAC – to avoid the confluence of creeks with any new road. An added benefit would be that the realignment could better distribute traffic
- A regional athletic field facility on other side of the powerlines is placed in the northwest quadrant. Neighborhood center which is basically the school site with a park. Roy Rogers retail node.
- The Far West district has a retail node and some hillside residential as the terrain gets steeper.
- The West district is most easily served by existing infrastructure extensions. Another retail node is on Kruger west of the Church. Hillside residential occupies the steeper slopes, with a hill-top park, similar to Snyder Park.
- The South West district is mainly residential.

Alternative B:

- Alternative B shows a school where there was an athletic field in Alternative A. It provides access to the neighborhood to the south with a connected park to the school. Also shows neighborhood retail node near slightly more intensive residential use.
- In this option, both Edy and Elwert roads are left in place, though they would still need to be widened and improved.
- Athletic fields are located in the Far West district along some flatter terrain. The facility is comparable to Mary S. Young State Park along Highway 43 in West Linn, OR.
- A nature preserve exists in the corner of the Far West district.
- A small retail node exists on the end of the West district and another retail node exists on Kruger, following an extension of Sunset Blvd.
- A second school is placed in the southern end up on the hills to provide views down to the neighborhood below.

Alternative C:

- Elwert and Edy stay where they currently are.
- A larger retail node exists along Scholls - Sherwood Road.
- The Northern end is a gateway district.

- The northern neighborhood is centered around a park.
- A greater intensity of housing exists along the edges of Sherwood West as opposed to A and B.
- The western district has a lower intensity residential scheme.
- A school is placed on Elwert between Kruger and Edy.

Community Feedback

Anais Mathez, Cogan Owens Greene, provided a brief overview of the feedback received in the last online survey. Launched in June, the purpose of the survey was to get any remaining comments on the project’s vision, goals and evaluation criteria, as well as to capture feedback on the three concept alternatives. The survey received more than 100 views and 54 completed responses. The survey aimed to gain insight on what elements are most favorable, rather than voting on one particular concept.

City and Consultant Team Alternatives Evaluations

Brad Kilby provided an overview of observations made by city and consultant team members on the three alternatives, including:

Alternative A

- Connectivity – Addresses concerns of reducing or deterring traffic by realigning Elwert; Connects to the far west
- Does well on incorporating nature
- Appears less walkable to schools except for walking to trails and parks
- Keep higher densities along major streets and intersections

Alternative B

- School does not make sense in that location as it is not connected to the community and “school zones” could restrict speeds on Roy Rogers & Scholls-Sherwood roads.
- Connections in the north should consider connecting Conzelman across Elwert
- Athletic field locations may not be good as the area is likely to be annexed in a later phase; concern about lack of density west of creek to justify cost of road improvements and bring it into UGB

Alternative C

- Too much retail - problematic for Town Center/Old Town
- Gateway District too large
- Lacks athletic fields
- Appears to include too much commercial
- Protects steep slopes

Group Discussion

- *Mike Dahlstrom* commented that he would like to keep retail away from 99W and instead encourage walkable communities through smaller neighborhood retail nodes.

- *ODOT* is concerned with the size of the retail nodes in Alternative B and the mixed-use gateway district on the southern end of Alternative C because of the increased traffic pressure along 99W.
- *Kristen Switzer* liked the location and accessibility of athletic fields in Alternative A. She noted that the Parks Board would rather see larger parks than pocket parks, as the latter are more expensive to maintain.
- *Carrie Pak* commented on the wide buffers drawn along the stream corridors. She noted the high impact on creeks through the road crossing on Alternative B and C.
- *Bob Galati* commented on the Edy/Elwert realignment in Alternative A, saying that it was a costly but more sensible approach in terms of the engineering and mitigation of wetland impacts.
- *Mike Dahlstrom* indicated that he will take the transportation information back to the County because some of it differs from the TSP. He also notes that the amount of commercial in Alternative C would lend to greater funding revenue for infrastructure from business (more tax revenue).
- *Jon Wolfe* noted that infrastructure is important and roads must be flat and wide.
- *Mike Daniels* commented that the police are interested in reducing the amount of high speed arteries (long straight roads) and supports Bob's statements about the Edy/Elwert realignment in Alternative A.
- *Carrie Pak* commented that stormwater did not seem to be a driver for the concept plans. She thinks that the drawn up stream corridors can work effectively and in concert with storm water management. This is important because it impacts the wildlife refuge.
- *Bob Galati* responds to say that a project will be in place to work on storm water hydro-modification issues and identify the areas that will need some dedicated facilities to help mitigate the hydro-modification requirements.

Martin asks the group to put forth the elements of the concept plan alternatives that have consensus.

- Smaller neighborhood retail nodes.
- Gateway in the Southern district as a means to help Sherwood connect to the wine country and support boutique hotels.
- Location of athletic facility in the Northern district, but with road access through study area rather than from the existing intersection.
- Realignment of Edy/Elwert from Alternative A.
- Low intensity residential development along steeper sloped areas.
- Any parks like the size of Woodhaven (3-4 acres) or bigger. There is support for something much larger like Snyder Park.

Closing Comments

- Carrie Pak likes the idea of a big athletic facility as a means to draw regional tournaments.

- Martin asks Carrie if there is any further research that's been done on Chicken Creek since the last report, dated about 15 years ago. Carrie responds that not much has come since then but that she will look into it further.

Next steps and adjourn

Kirstin thanked everyone for their participation and announced that the next TAC meeting is September 17. She reminded the group that Martin will take the ideas from today's activity and incorporate them into a preferred concept alternative to present and discuss at the next meeting. Brad adjourned the meeting at 5pm.

I. Acknowledgements

- A. Community Advisory Committee
- B. Technical Advisory Committee
- C. Planning Commission
- D. City Council
- E. Staff and Consultants

II. Table of Comments

III. Purpose of the Document

- *The purpose of the document will reflect the idea that the Sherwood West Preliminary Concept Plan is a tool for future decision makers to decide what areas make the most sense to expand into given the availability of infrastructure, the costs associated with the extensions of those services into the urbanizing area, and the property owner sentiment as it relates to growth and the expansion of the City into Sherwood West.*

IV. The Process

- *Summary of the project background. Why we did it, how it was funded, and what we hoped to accomplish.*
- *Discussion of the public outreach, the formation of the TAC and the CAC.*
- *Development of vision, goals, and evaluation criteria.*
- *Summary of meetings, workshops, interviews, and community outreach activities.*

V. Sherwood West

- A. Existing Conditions
- B. Housing Needs Analysis
- C. Stakeholder Interviews
- D. Boundaries and Buildable Lands Inventory
- E. Transportation and Utilities
- F. Natural Resources
- G. View Corridors

VI. The Plan

- A. Alternatives Development and Analysis
- B. Preferred Alternative

VII. Phasing and Implementation

- A. Phasing Plan
- B. Funding Sources/Matrix

VIII. Conclusion and Next Steps

- *Discussion of the timeline/process for development, including: UGB expansion (typically every 6 years); refinement plan; annexation request & general election; intergovernmental agreements; land use applications and public hearings; building permits; and construction.*
- *Ideas and concepts to keep in mind during the refinement planning process.*

During the Alternative Analysis phase of the Sherwood West Preliminary Concept Plan, the City of Sherwood launched a second survey between June and August 2015. The aim of the survey was to capture feedback on the project vision, goals and objectives, as well as public opinion on the three draft concept alternatives for Sherwood West.

In addition to a web-based platform, paper versions of the survey were handed out as comment forms at the second community workshop event (Ice Cream Social) on June 18th, 2015. Overall, 77 people were engaged through the survey, with 68 online submissions and 9 completed comment forms.

Of those who provided demographic information, 37% of participants were between 25-44 years old, 41% were between 45-64 years old and 22% were 65 and older (n=46). Overall, 12 participants were property owners in Sherwood West and 26 were property owners within the City. Four participants were renters within the City and 4 participants lived outside the City.

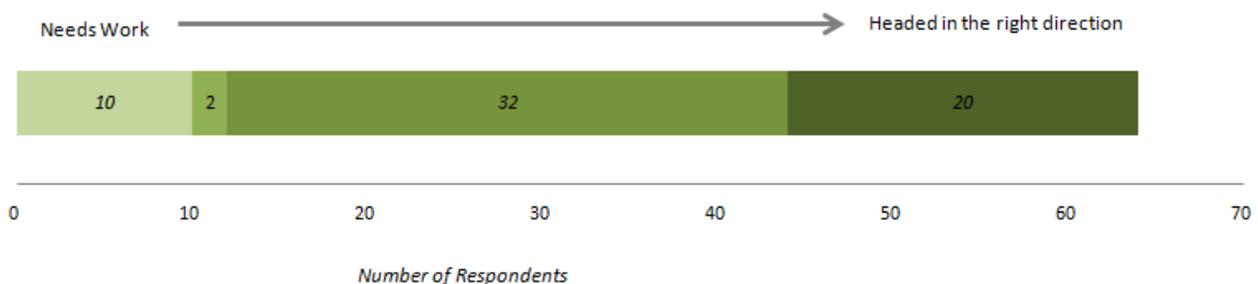
The survey opened on June 17, 2015 and closed on August 26, 2015. The link was available on the City’s project website and promoted through social media. Flyers were available at the front desk of City Hall and handed out at community events and project meetings. Based on the feedback received upon the survey closeout, the following sections summarize the main themes.

I. Vision Statement

Based on community guidance to date, the draft vision statement for Sherwood West states:

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.

The majority of participants are relatively satisfied with the vision statement (n=64), with 52 participants rating the statement as a 3 or higher (1=needs more work, 4=headed in the right direction).



Suggestions for improving the statement include the mention of attracting new businesses that connect to local tourism, emphasis on residential development near existing schools and commercial centers, and consideration for improved transportation corridors.

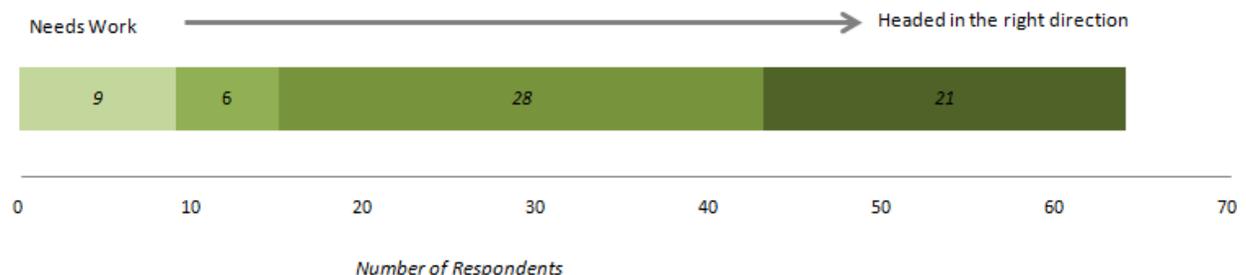
- *“I think there should be some attention to bringing in businesses that will help connect us to the wine country that we are increasingly becoming a part of. [Visitors] from Portland and elsewhere are already driving through Sherwood between Portland and wine country; let’s give them a reason to stop in Sherwood.”*
- *“Protect natural resources, provide recreational areas...[and] account for additional services required for increased population, including groceries, restaurants, parking, entertainment, shopping, schools, fire and police, etc.”*

II. Goals and Evaluation Criteria

Drafted with input from key stakeholders and the community, the following goals and evaluation criteria were established to guide the analysis of the alternative concept plans for Sherwood West:

Goal	Evaluation Criteria for Comparison of Alternatives
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
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

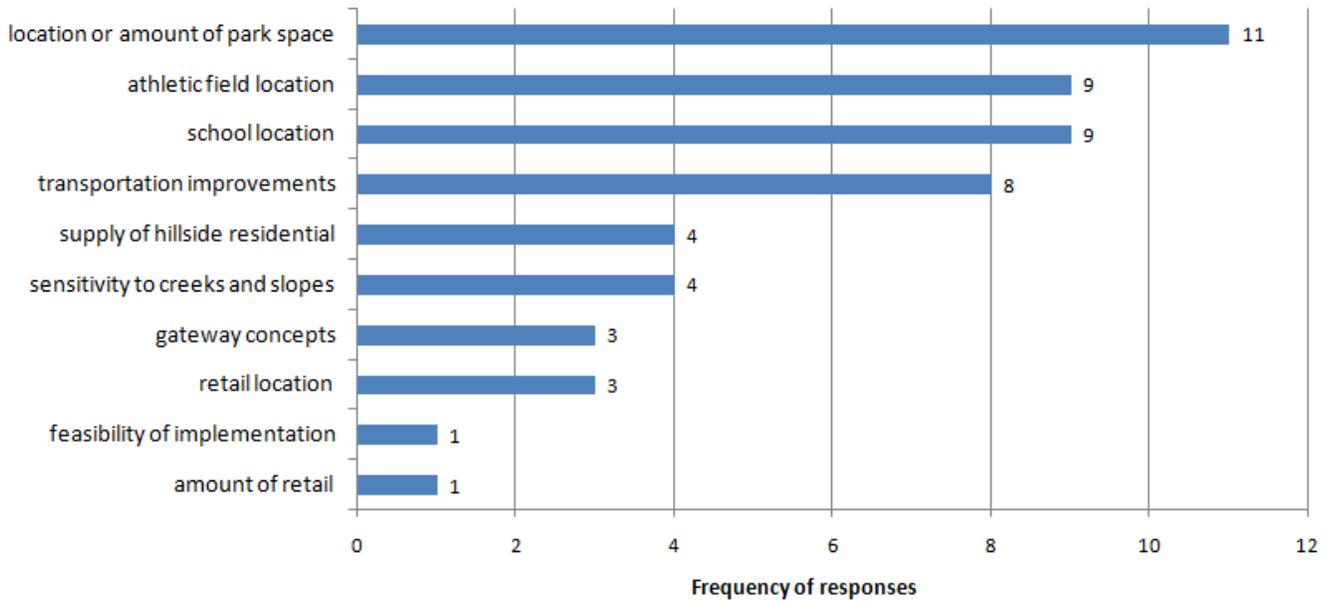
Similar to the vision statement, the proposed goals and evaluation criteria for Sherwood West were well received (n=64). The majority remained supportive of the statements, with 49 of 64 participants rating them as a 3 or higher (1=needs more work, 4=headed in the right direction).



Suggestions for improving the goals and evaluation criteria included explicit mention of expanding existing educational facilities to support the school system. In addition, a desire to see transportation was also emphasized.

III. Draft Alternative A.

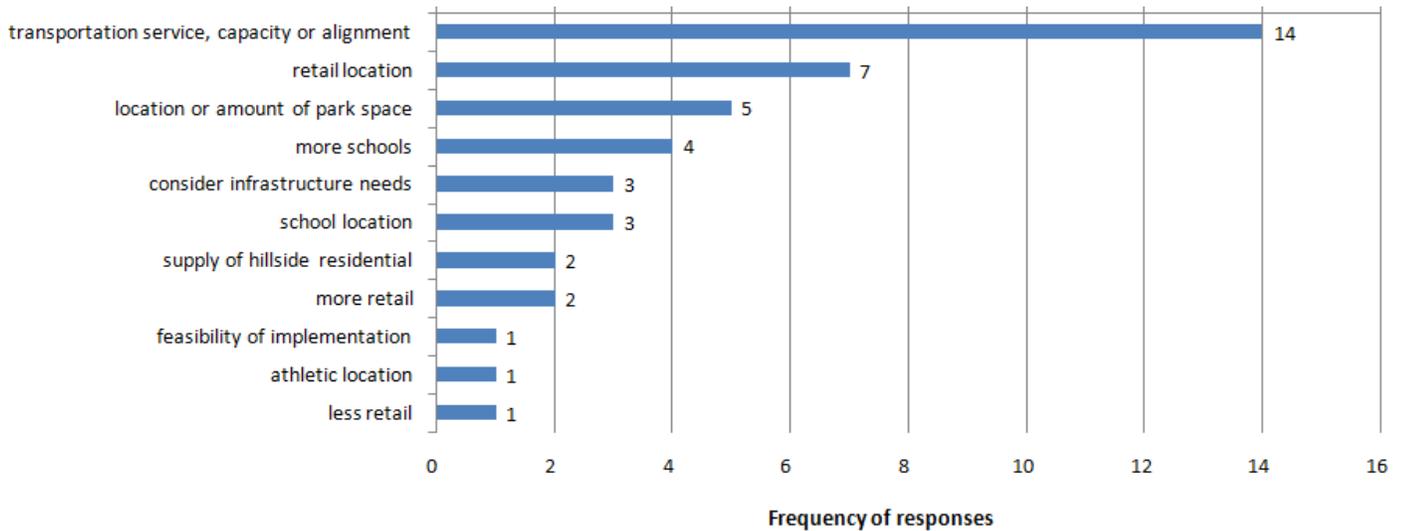
What appeals to you about this option? (N=33)



Alternative A received positive feedback about the large amount of space dedicated to parks and natural areas. The location of the school and athletic facility and their proximity to one another was favored for the flat terrain, road access and opportunity to act a gateway into Sherwood. In addition, the rerouting of Edy and Elwert Rd. to minimize through-traffic and creek crossings were well supported.

- *“Elwert road avoids the confluence of creeks and the curves make it less desirable as a thoroughfare.”*
- *“The athletic fields on the north would be a nice gateway into town.”*
- *“The small retail space could be nice at the Edy and Elwert intersection.”*
- *“I like the Incorporation of parks, walking trails, and athletic fields.”*

What could make it better? (N=33)

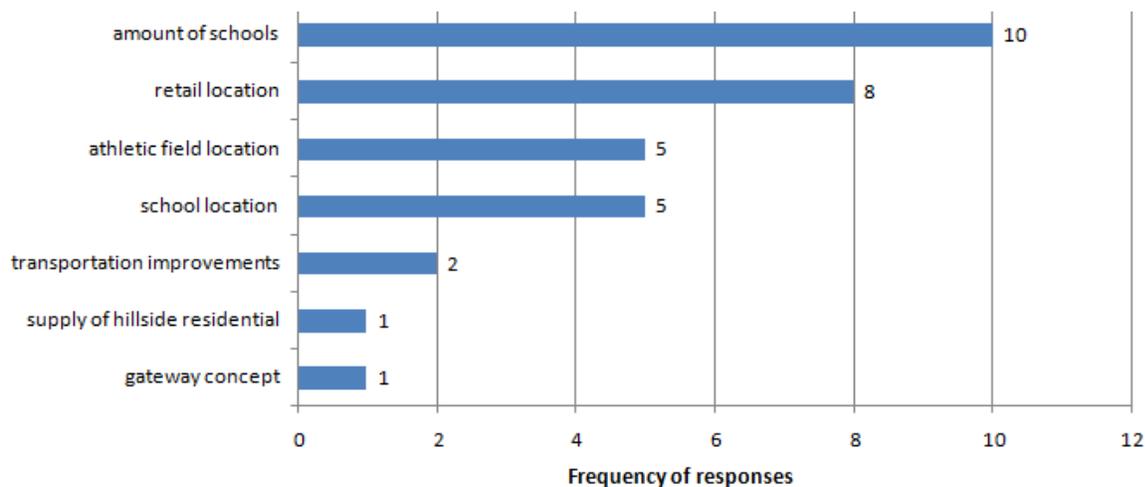


Concerns about Alternative A focused around increased traffic with the new Edy/Elwert interchange, as well as the location of the retail nodes. The marketability of these nodes was raised, and comments suggested clustering them closer to major thoroughfares. The desire to see another school in the area was also expressed.

- *“Focus commercial along 99W more, [with retail] that creates a destination related to tourism in the Willamette Valley.”*
- *“I am concerned with increased traffic with the Elwert / Edy intersection change.”*
- *“I don’t like retail next to the Sunset and HWY 99 intersection”*
- *“It seems like the school should go further south but then the athletic fields don’t make as much sense in the north. Maybe add a nature preserve at the confluence of the streams.”*

IV. Draft Alternative B.

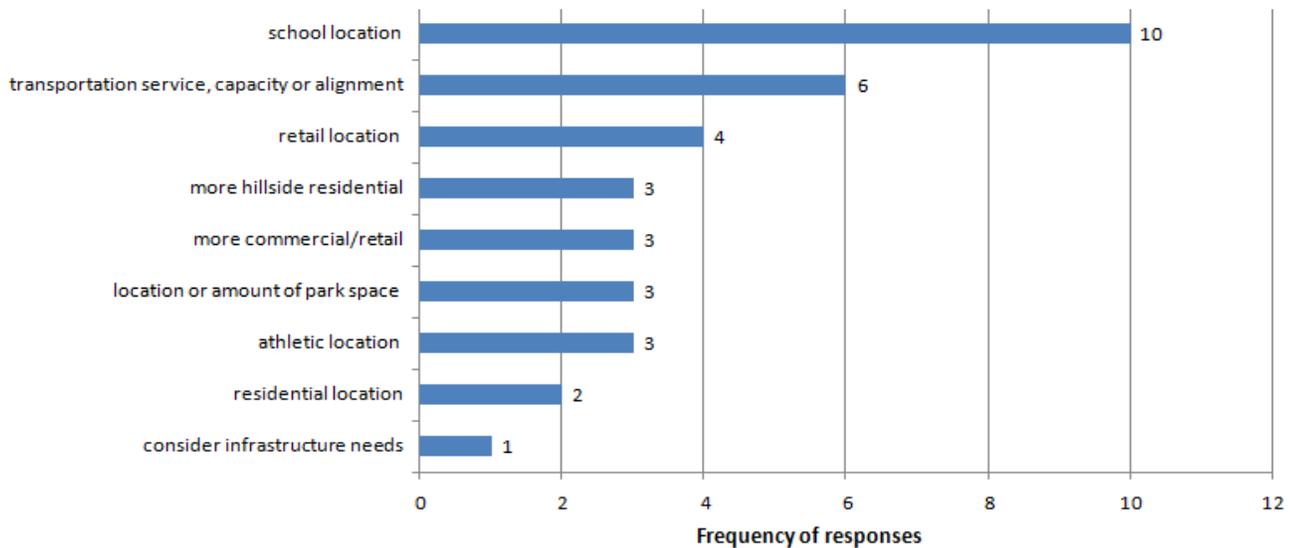
What appeals to you about this option? (N=32)



Respondents were receptive to the idea of accommodated two schools within Sherwood West. In addition, the clustering of retail along major thoroughfares and the location of mixed-use centers received positive feedback.

- *“Much better! Love the 2 school areas, athletic fields next to park makes much more sense, concentrated mixed use and retail is better. I like that each neighborhood has a small park.”*
- *I like the parks in the middle and the two school options; it feels more “family neighborhood-esque”. There is a lot of room to get everyone together to play and meet.”*

What could make it better? (N=27)

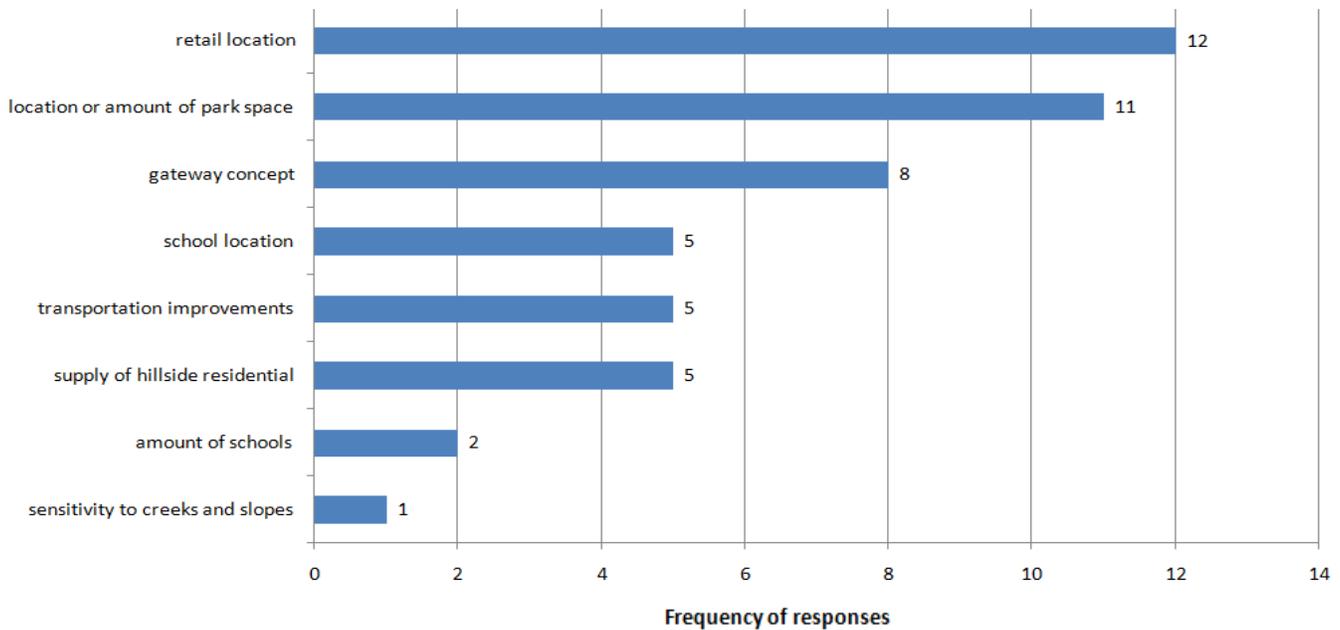


Most of the concern centered on the location of the school along two busy roads and a major intersection. Comments suggested putting retail there instead, allowing for greater interspersing of residential types and having better road access between all four Sherwood West neighborhood quadrants.

- *“Athletic fields would probably be better close to a school [and] one of the schools is by a very busy road.”*
- *“Homes in the southern development that are adjacent to the highway will be a poor investment unless you incorporate a big sound wall or move the park over there.”*
- *“Better placement of schools, a little more mixed use and more intermingling of large lots and smaller lot, like in Alternative A.”*

V. Draft Alternative C.

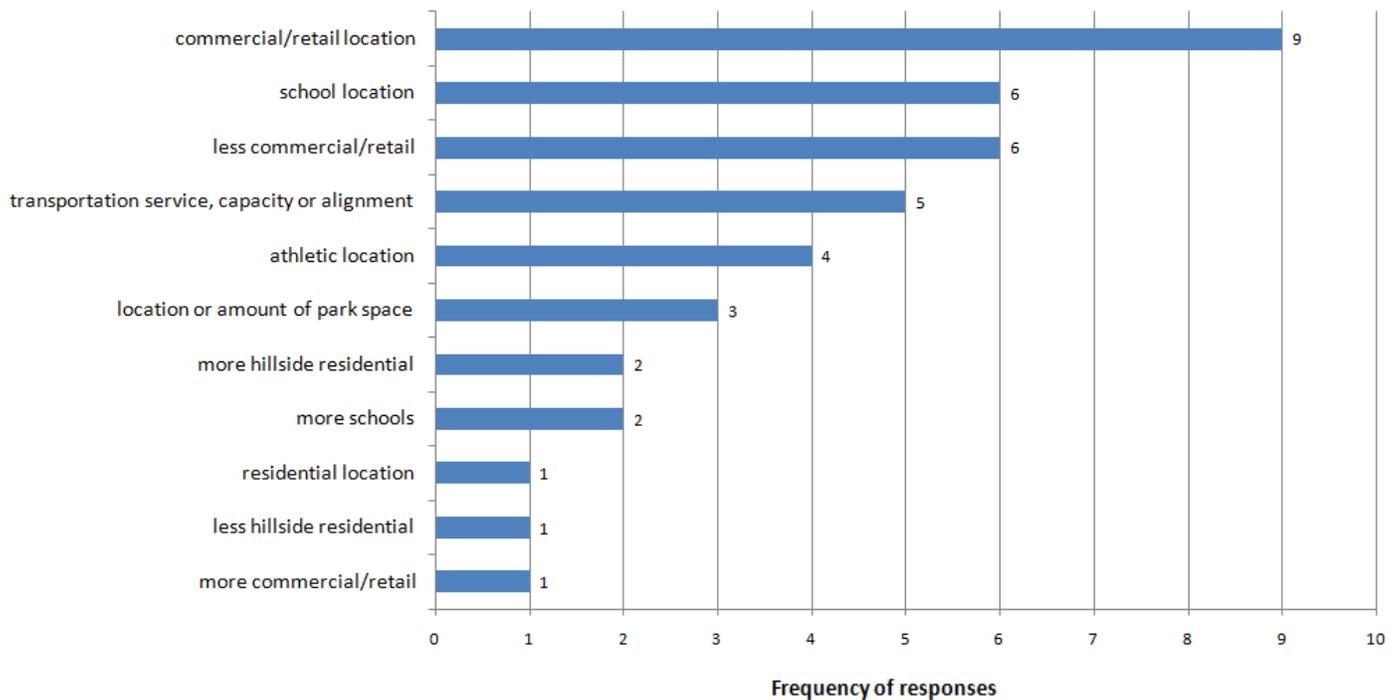
What appeals to you about this option? (N=32)



In Alternative C, the location of retail nodes and mixed-use/commercial centers was most appealing. The park at the confluence of the streams were noted as positive attributes, and comments suggested that the school location closer to the center of the Sherwood West area was a good place if the area was to consider only one school rather than two.

- *“I like the gateway mixed use in the south, the idea of a new school near Edy and Laurel Ridge, [as well as] the park at the confluence of the streams, but I think it should be expanded and be a preserve.”*
- *“The nature park location, the added park in the Chicken Creek natural area linked to trails, the gateway district and the retail at NE corner. Number of roundabouts on Elwert look about right, except at Edy intersection.”*
- *“I like the location of the mixed use and retail best in this design. I also really like that more of the residential is away from the Hwy, although more of it does face the other high traffic access roads.”*

What could make it better? (N=28)



Respondents felt that Alternative C was the most commercialized of all three, suggesting that overall retail should be reduced, especially in the northern end of Sherwood West, to maintain the “small town” character. Comments suggested that the location of the school be reconsidered, possibly moving it farther north as in the other Alternative concepts.

- *“I don't like the retail on Roy Rogers, though I like that it is surrounded by greenspace. I think the NW neighborhood should be half large lot, with a park. I think the athletic fields from Alternative 2 could be incorporated, along with the Elwert road reroute, small retail near the fields, and mixed use center from Alternative 1.”*
- *“I would move the school location – it seems too close to the other schools.”*
- *“Remove the little neighborhood commercial areas - they do not work efficiently unless a developer creates a special comprehensive community like Orenco Station and Gardens in Hillsboro or Villebois in Wilsonville with the required densities to make it work. Add creative roundabout at Edy and Elwert.”*

VI. Anything missing?

Participants were asked to identify if there was anything missing that could help complete or add to the quality of life in Sherwood. Comments referred to a desire to incorporate the following elements into the concept alternatives: a swimming pool, community spaces, senior housing and a trail or park under

the transmission line. In addition, there was desire for a better alternative than a roundabout at HWY 99 and Elwert/Kruger Road, and to treat Elwert Road as a neighborhood access route.

VII. Limitations and Main Takeaways

The breadth and quality of public feedback on these alternative concept plans was subject to the format and display of the survey content. The alternative concepts are represented through detailed, hand drawn maps. The web platform did not allow for respondents to pan and zoom over the maps, nor display each alternative side by side for comparison purposes. Paper comment forms collected from participants who attended the open house/ice cream social were able to study the maps on large-scale boards, making it easier to identify and compare concept elements.

Overall, survey feedback indicated a mix of viewpoints, revealing no clear preference for one alternative concept over another. The prevailing opinion about development in Sherwood West is that “less is more.” Many comments emphasized the adverse impacts of density on the natural environment and land for agricultural activity and rural living.

In terms of transportation, a general tension exists between treating roads as either neighborhood access routes to minimize through-traffic, or designing roads to improve traffic flow and accommodate increased capacity due to new development.

Across the three alternative concepts, the following themes were identified as important considerations or elements:

- 2 school locations are better than one;
- Include an athletic facility;
- Locate parks and athletic facilities in close proximity to the school(s);
- Cluster retail closer to main thoroughfares;
- Preserve and expand park area, particularly around confluence of local creeks;
- Plan roads to alleviate traffic (and/or) maximize traffic flow.

Sherwood West – Draft Hybrid Preliminary Concept Plan Narrative

Introduction

The draft hybrid preliminary concept plan (hybrid plan) has been crafted in response to input received from stakeholders, including the Community Advisory Committee; the Technical Advisory Committee; citizen surveys and City staff, at various public events. The hybrid plan was developed based on the feedback provided over the past couple of months on three draft plan alternatives.

The alternatives explored a variety of ideas in order to solicit preferences for individual and collective plan elements which have been combined and advanced into a single hybrid alternative. The plan is also based upon the existing conditions analysis and landform analysis that strongly suggests that the unique identity of Sherwood is defined by its walkable neighborhoods, “nestled” into the rich landscape of creeks, hillsides, and valleys. Sherwood’s landscape setting continues to offer direction for future urban growth.

In the Sherwood West Area, four (4) distinct sub-areas are recognized within the dramatic landscape of these creeks, hills and valleys. For the purpose of identification they have been given the following working-titles:

- **The North District:** south of Scholls-Sherwood road, north of Chicken Creek;
- **The West District:** in the middle of the planning area, directly west of Elwert Road and east of Chicken Creek;
- **The Far West District:** west of Chicken Creek and adjacent to Edy Road;
- **The Southwest District:** north of Chapman Road and south of Goose Creek (a tributary to Cedar Creek).

Draft Hybrid Preliminary Concept Plan description

- **The North District** includes a mixed-housing neighborhood organized around a new school, neighborhood park and mixed-use node. Residential density transitions from the center to edge of the neighborhood. The corner of Roy Rogers and Scholls-Sherwood roads is envisioned as athletic fields intended to serve the needs of the entire City. The location on the edge of town offers both local (non-motorized) access from the adjacent neighborhood, as well as vehicular access from the adjacent arterial network. The neighborhood park connects the athletic fields with the school and a branch of Chicken Creek. Residential housing is oriented towards the central open space. West of Elwert Road, residences are organized around a smaller neighborhood park that marks the high point of a topographic ridge and provides the terminus for a second creek branch. Trails connect the parks with the natural features and a larger, city-wide trail system.
- **The Far West District** includes a mixed residential neighborhood with the higher and steeper elevations envisioned to be hillside residential. In response to the property owners’ wishes, and the fact that a large portion of the property is within a nature conservancy, the northeast corner of this district is set aside for a nature park to capitalize on the existing habitat and sensitive topography.
- **The West District** is a mixed-housing district organized around a proposed mixed-use center at the intersection of Kruger Road and a new neighborhood connector street paralleling Elwert



Sherwood West

Preliminary Concept Plan

A long range look at our future.

Road. Housing intensities transition out from this mixed-use center (high to low). A neighborhood park is proposed at the headwaters of an unnamed creek branching off Chicken Creek. The intersection of Elwert and Edy roads has been relocated to reduce the impact of infrastructure improvements (road widening) on sensitive creek confluences, offering the additional benefit of potentially discouraging regional traffic that seeks an alternative north-south route to Highway 99. At its ultimate build-out, Elwert Road is envisioned as a landscaped, multi-modal boulevard and an extension of Sunset Boulevard, east of Highway 99. A secondary and smaller mixed-use node is proposed at the intersection of Elwert Road and Handley Street. This node is intended to serve future residential neighborhoods in Sherwood West, as well as existing neighbors east of Elwert, and is within walking distance of Edy Ridge and Laurel Ridge schools.

- **The Southwest District** is a mostly residential neighborhood with varying intensities. A neighborhood park is envisioned on the top of the hill adjacent the water reservoir, much like the beloved Snyder Park sits on a hilltop on the east side of Sherwood. The higher and steeper elevations are envisioned as hillside residential. This district also includes an area adjacent to Highway 99 that could facilitate “Gateway to Wine Country” opportunities, such as tourism, lodging, a visitor center and wine and agriculture-related commercial uses.

An integral trail system is included to provide safe, convenient and comfortable non-motorized connections between all neighborhoods, the existing Sherwood trail system, and other Sherwood destinations, including historic downtown.

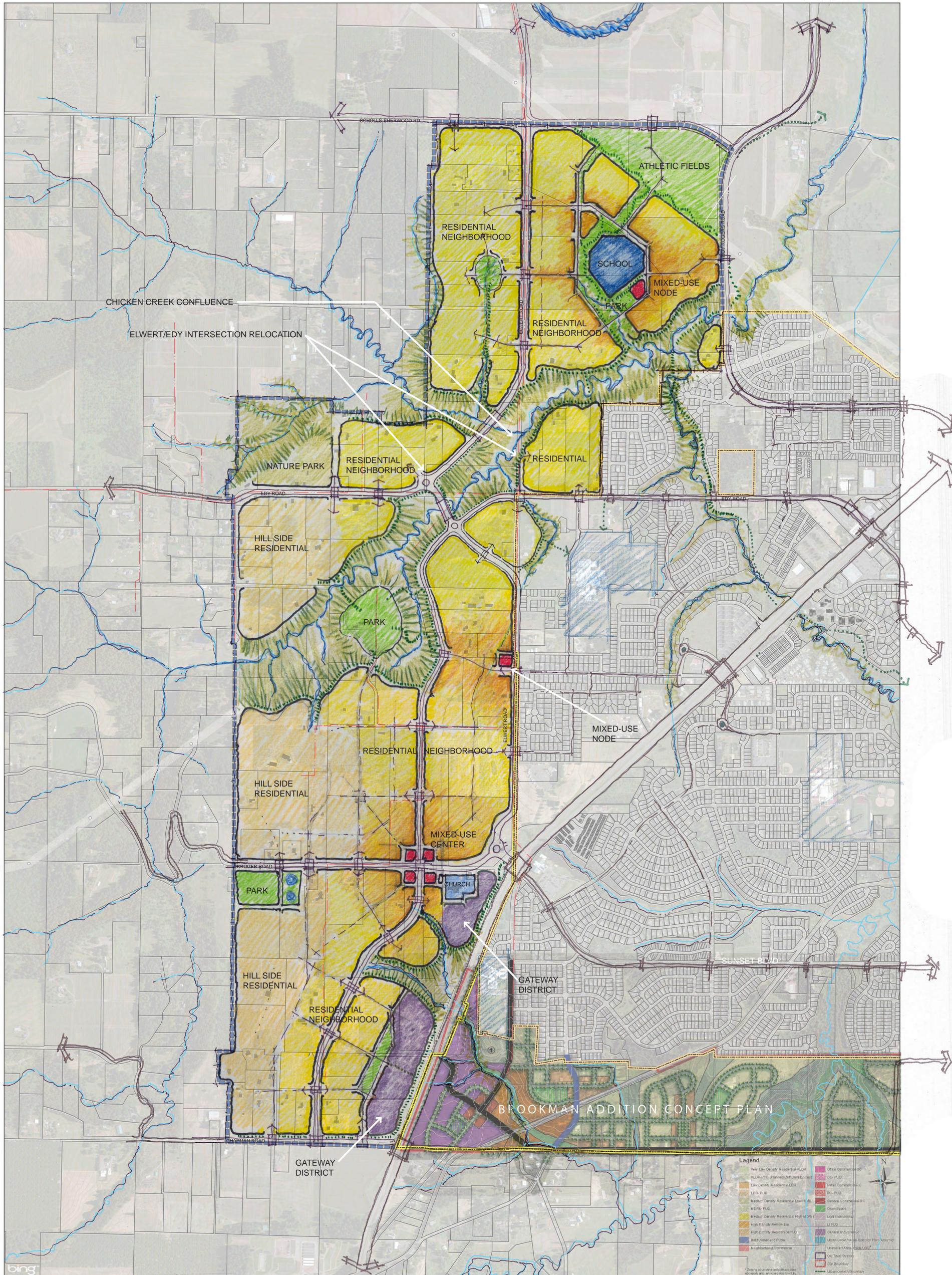
Martin Glastra van Loon

9/10/2015

SERA

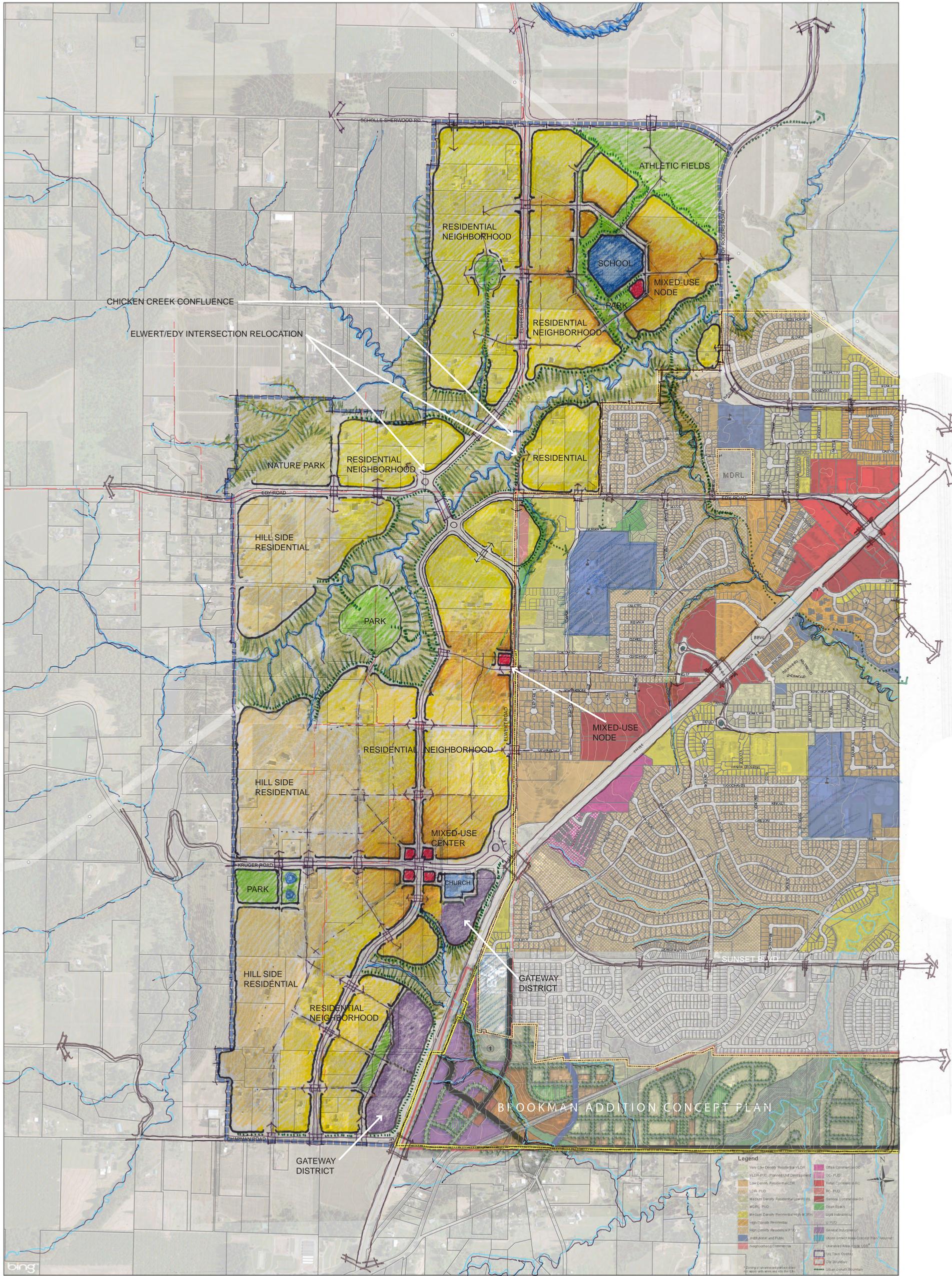
sustainable design for the built environment

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DRAFT PREFERRED PLAN

8 SEPTEMBER 2015



DRAFT PREFERRED PLAN

8 SEPTEMBER 2015

DATE: August 14, 2015
TO: Brad Kilby and Connie Randall, + COG Team
FROM: Lorelei Juntunen
SUBJECT: SHERWOOD WEST PHASING AND FUNDING STRATEGY (ANNOTATED OUTLINE / DISCUSSION DRAFT)

ECONorthwest (ECO) is part of a consulting team led by Cogan Owens Greene (COG) that is assisting the City of Sherwood with development of a Preliminary Concept Plan for Sherwood West. The goal of the Preliminary Concept Plan is to create a roadmap that will help inform future possible urban growth decisions regarding the Urban Reserve Area 5B (Sherwood West). ECONorthwest is charged with, among other tasks, assisting with the development of a phasing and funding strategy for infrastructure and efficient development in the Sherwood West area. This memorandum provides an annotated outline of ECO's final product for that task, for discussion and clarification with the team.

From ECO's Scope, identifying purpose of analysis (for context):

Conduct research and analysis through interviews with key City staff to develop financing strategies and funding scenarios. Identify amendments to the Comprehensive Plan and Zoning Code. Assist in developing a phasing and funding strategy.

Introduction

Intro will cover process for developing strategy (service provider interviews, TAC and CAC process). Should also describe the purpose of the Phasing and Funding Strategy in the context of a pre-concept plan: the Strategy is not prescriptive and specific, but instead: (1) identifies a starting place for a more detailed implementation strategy when a concept / master plan is developed; (2) identifies financial and other barriers or challenges to implementation and preliminary approaches to overcome them; (3) identifies the implications of the pre-concept plan for comprehensive plan updates, zoning code, capital improvements plans, and funding priorities; (4) provides a set of near-term actions to prepare for more detailed planning and, eventually, for development.

Phasing

Key questions addressed:

How should growth in the area be sequenced to improve cost efficient infrastructure provision?

Approach notes:

Build upon service provider memo to identify the most logical area in Sherwood West to initiate development. Include map that indicates phasing strategy in conceptual way (overlaid over the final concept plan). Include rough, order of magnitude costs provided by the City for each type of infrastructure, ideally broken down by geography, to provide an overview of likely costs associated with phasing plan. Categories of infrastructure considered are:

- Water, sanitary sewer, stormwater

-
- Transportation (assuming that local roads are developer responsibilities)
 - Schools
 - Public safety and fire

Preferred Funding Tools

Key questions addressed:

Given the rough, first look at costs by phase, what funding tools should the City be considering?

Approach notes:

Build on service provider conversations to identify funding sources appropriate to the phased costs and development situation in Sherwood West. Include the wide range to tools appropriate to all categories of infrastructure and other costs (including local option levies for schools, utility rates for utilities, etc), an evaluation of those tools against criteria, and a list of a handful of “preferred tools” that deserve a closer look during concept / master planning, for each category of infrastructure and phase.

We propose the following criteria for evaluation of funding tools:

- **Capacity.** Can the tool generate sufficient revenue to serve as a cornerstone for an infrastructure funding plan?
- **Timing.** Can the tool provide up-front revenues to cover infrastructure, even before development occurs?
- **Administrative ease.** How much administrative burden does the tool impose on City staff and resources?
- **Stability/predictability.** Does the tool provide a consistent and reliable source of funds over time?
- **Flexibility.** Does the tool have limitations on its use that reduce its utility for the area?
- **Legality.** Can the tool legally be used for the projects identified?
- **Fairness.** A “who pays” criterion. Are costs imposed proportionate to benefits received?
- **Political acceptability.** How controversial is the tool? Will the public and regional and local elected leaders support its use for the area?

Retail/Commercial Implementation

Key questions:

The pre-concept plan contains several small, neighborhood-scale commercial nodes. What factors will make these nodes more or less successful? What lessons should shape the approach to refining these nodes in the concept / master plan phase of work? Are there funding or financing implications for approaches to making retail successful?

Approach notes: Literature review; rules of thumb around households per square foot of retail; evaluation of demographic and other trends that suggest increasing demand for small-scale, walkable retail (pull data projections from Claritas); implications of research for refined planning and for funding / finance priorities and tools.

Implications and near-term actions?

Key question:

What does all of this mean for the City's comprehensive plan updates, zoning code, capital improvements plans, and funding priorities?

Approach notes:

Identify near-term actions to prepare for implementation, especially in Phase I geography, to set the stage for eventual successful UGB expansion process. Focus is on ensuring that infrastructure provision is cost effective, and on setting the stage for more detailed funding planning.

Sherwood West Pre-Concept Plan

Discussion Draft: Initial Evaluation of Funding Tools

Sherwood West will need to access a range of funding tools to cover infrastructure (sewer, water, roads, etc.) costs to support urban development. To initiate that conversation, ECONorthwest considered a comprehensive list of funding tools against set criteria to arrive at an initial list of preferred tools for discussion.

CRITERIA DEFINED		
CAPACITY Can the tool generate sufficient revenue to serve as a cornerstone for an infrastructure funding plan? (Note that some tools that perform well on other criteria but generate relatively small amounts of revenue may still be included as one component of a larger funding plan even though they are not selected here as a "preferred" tool.)	ADMINISTRATIVE EASE How much administrative burden does the tool impose on City staff and resources?	FAIRNESS: Who pays? Are costs imposed proportionate to benefits received?
TIMING Can the tool provide up-front revenues to cover infrastructure, even before development occurs?	STABILITY/PREDICTABILITY Does the tool provide a consistent and reliable source of funds over time?	LEGALITY Can the tool legally be used for the projects identified on the site?
	FLEXIBILITY Does the tool have limitations on its use that reduce its utility for the Sherwood West site?	POLITICAL ACCEPTABILITY How controversial is the tool? Will the public and regional and local elected leaders support its use for the Sherwood West site?

The following matrix provides an assessment of a comprehensive list of funding tools against the criteria, and identifies the **four preferred tools** that have been selected for further evaluation.

		Efficiency					Fairness	Legality	Political Acceptability
		Capacity	Timing	Administrative Ease	Stability/Predictability	Flexibility			
Citywide Tools	Property Tax: GO bonds	+	+	+	+	+	✓	✓	✓
	Income Tax	+	+	✓	-	+	-	✓	-
	Sales Tax	+	+	-	✓	+	✓	✓	-
	Payroll Tax	+	+	-	-	-	-	-	-
Transportation Related	Toll	✓	✓	-	✓	✓	+	✓	-
	Local Gas Tax	-	✓	-	✓	✓	✓	✓	✓
	VMT Tax	-	✓	-	✓	✓	✓	-	-
	Local Weight-Mile Tax	-	✓	-	-	✓	✓	-	-
	Vehicle Registration Fee	-	✓	-	✓	-	✓	-	✓
Development Derived	Sole Source SDC	✓	-	+	-	✓	+	✓	+
	Supplemental SDC	+	-	✓	-	+	+	✓	✓
	LID	✓	✓	✓	✓	+	+	✓	+
	Urban Renewal	+	-	✓	✓	+	✓	✓	-
	Income Tax Sequestration	-	-	-	-	?	-	-	-
	Construction Excise Tax	✓	-	✓	-	?	+	-	+
	Permit/Record Surcharge	-	-	✓	-	✓	+	✓	-
Other	Utility Fee	+	✓	+	+	+	✓	✓	✓
	Transient Lodging Tax	-	-	✓	✓	✓	-	✓	+
	Business License Fee	-	-	✓	-	+	-	✓	✓
	Real Estate Transfer Tax	✓	-	-	-	?	+	-	-

Legend			
Good	+	Bad	-
OK	✓	Fatal Flaw	-
Unknown	?	Preferred Tool	+

Sherwood West Pre-Concept Plan

Tool Definitions

Citywide Tools		Notes
Property Tax: General Obligation (GO) Bonds	Local property taxes are committed to pay debt service on a city-issued GO Bond. GO bond levies typically last for 15 to 30 years for capital projects, and must be approved by a public vote. The effective property tax levied to support GO bond obligations can vary over time, based on the total assessed value of property within the jurisdiction that issued the bonds and the scheduled GO bond payment obligations.	Identified as a preferred tool because it can generate large amounts of up-front funding for infrastructure to support development.
Income Tax	A tax on income, typically calculated as a surcharge on state income tax. Could apply to people, corporations, or both. Relatively low rates (1-3%) have potential to generate substantial levels of revenue.	Fatal flaw: Income tax is controlled at the state level and is not typically used to cover local government costs.
Sales Tax	A tax on retail sales, typically added to the price at the point of sale. Sales taxes are generally considered regressive because low-income people pay a higher percentage of their income than high-income people. There is no state sales tax in Oregon, but local governments could adopt a local sales tax. Essential goods like food, medicine, and housing are typically exempt from a sales tax.	Fatal flaw: Low likelihood of political acceptability for adopting a sales tax to fund growth.
Payroll Tax	A tax on wages and salaries paid by employers or by employees as a payroll deduction. A payroll tax generates revenue from people who work inside, but live outside of the area in which the tax is applied. Low rates (<1%) have potential to generate substantial levels of revenue.	Fatal flaw: Payroll tax revenue is used for operations and maintenance expenses associated with the transit systems, and would require significant effort to transfer to use for funding infrastructure.

Transportation Related		Notes
Toll	Tolls (e.g. on highways and bridges) are the most familiar form of a transportation access charge. Transportation access charges are most appropriate for high-speed limited access corridors, service in high-demand corridors, and bypass facilities to avoid congested areas.	Fatal flaw: Tolls lack political acceptability and are difficult to administer.
Local Gas Tax	A tax on the sale of gasoline and other fuels, levied as a fixed dollar amount per gallon. Typically, the use of local gas tax revenues is limited to transportation projects.	Fatal flaw: Gas tax is not likely to generate significant amounts of revenue, and could be difficult to administer.
Local Weight-Mile Tax	Heavy vehicles pay the weight-mile tax instead of the gas tax. The tax rate increases with the weight of the truck, and is assessed per mile traveled in Oregon.	Fatal flaw: Administration relies on self-reporting, which limits the accuracy and may require additional staffing to audit self-reported weights. Capacity is limited.
Vehicle Registration Fee	In Oregon, counties (but not cities) can implement a local vehicle registration fee. Fees are limited to \$43 per vehicle, charged every two years. A portion of a county's fee could be allocated to local jurisdictions.	Fatal flaw: The vehicle registration fee generates limited funds.

Sherwood West Pre-Concept Plan

Tool Definitions

Development Derived		Notes
Sole Source Systems Development Charge (SDC)	SDC's are one-time fees based on proposed new use or increase in use of a property. Sole Source SDCs retains SDCs paid by developers within the limited geographic area that directly benefits from new development.	Could be one component of a funding strategy, but lacks ability to generate sufficient revenue to cover costs.
Supplemental SDC	Supplemental SDCs are additional SDCs charged on a specific sub-area of a city and are supplemental to the city's existing SDC.	Commonly used in expansion areas as one component of a funding plan.
Local Improvement District (LID)	An LID is a special assessment district where property owners are assessed a fee to pay for capital improvements, such as streetscape enhancements, underground utilities, or shared open space. LIDs must be supported by a majority of affected property owners.	Commonly used in expansion areas as one component of a funding plan. More analysis regarding property owner willingness to pay is required.
Urban Renewal	Tax increment finance revenues are generated by the increase in total assessed value in an urban renewal district from the time the district is first established. The governing body, usually acting on the recommendation of Technical and Advisory Committees, creates an urban renewal district with specific boundaries and identifies improvements to be funded within the district. Bonds may be issued to fund improvements. As property values increase in the district, the increase in total property taxes (e.g., city, county, school portions) is used to pay off the bonds. When the bonds are paid off, the entire valuation is returned to the general property tax rolls. Urban renewal funds can be invested in the form of low-interest loans and/or grants for a variety of capital investments: redevelopment projects, economic development strategies, streetscape improvements, land assembly, transportation enhancements, historic preservation projects, and parks and open spaces.	Urban renewal is not typically used in greenfield development areas that are not perceived as "blighted." However, they can be powerful tools for funding infrastructure and the city is legally able to use this tool in Sherwood West.
Income Tax Sequestration	A variation on a local income tax is income tax sequestration. This concept identifies some group of income tax payers and diverts some or all of their state income tax revenues to a specific project.	Fatal flaw: Administering this tool could be expensive and complicated. There is currently no State-sanctioned program in Oregon that would allow income tax sequestration, so a new program would need to be created.
Construction Excise Tax	A construction excise tax is a tax levied on the value of new construction.	Key limitation: Only school districts may levy a new excise tax. This source could potentially be used to fund school capital projects in Sherwood West, but it could not be used for infrastructure.
Permit/Record Surcharge	Building permits are fees charged to property owners for new construction, additions, or remodeling property. The amount of the building permit fee typically depends on the value of the construction.	Fatal flaw: This source generates very limited amounts of funding.

Sherwood West Pre-Concept Plan

Tool Definitions

Other Tools		Notes
Utility Fee	A utility fee is a fee assessed to all businesses and households in the jurisdiction for use of specified types of infrastructure or public utilities, based on the amount of use (either measured or estimated). Most jurisdictions charge water and sewer utility fees, but utility fees can be applied to other types of government activities as well (both capital projects and operations and maintenance). A utility fee could be applied citywide or in a smaller area within a city.	Utility fees are increasingly used to fund infrastructure projects.
Transient Lodging Tax	A transient lodging tax is a fee charged to customers for overnight lodging, generally for periods of less than 30 consecutive days. The fee is a percentage of lodging charges incurred by the customer, though some jurisdictions levy a flat fee per room night. Typical tax rates range between 3% and 9%. These local tax rates are in addition to the State transient lodging tax of 1%. Although local jurisdictions use transient lodging tax revenues to fund a wide variety of programs, the State enacted new legislation in 2003 that requires new or increased local transient lodging taxes to dedicate at least 70% of net revenue to fund tourism promotion or tourism-related.	This could be used as one component of a funding plan, but lacks the capacity that bonds and other preferred tools carry.
Business License Fee	There are a variety of ways that jurisdictions could choose to charge fees on businesses, including a flat one-time fee, to an annual fee based on sales, number of employees, size of building, amount of parking, or other factors. License fees can apply to all businesses or only certain businesses such as automobile dealers or service stations.	Fatal flaw: This source generates very limited amounts of funding.
Real Estate Transfer Tax (RETT)	A RETT is a tax levied on the sale price of real property transfers. In other words, a sales tax on the value of homes, applied whenever there is a transfer of title for real property.	Fatal flaw: It is now illegal to adopt a new real estate transfer tax in Oregon.

ASSESSMENT OF DRAFT HYBRID PRELIMINARY CONCEPT PLAN

VISION: 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.

Goals and Evaluation Criteria

Goal	Evaluation Criteria	High	Med	Low	Comments
1. Growth is well-planned	<ul style="list-style-type: none"> • Neighborhoods are phased adjacent to existing development • Well phased extension of services • Connectivity 		X		<ul style="list-style-type: none"> • Neighborhoods are well connected and build upon adjacent development, yet will rely on a coordinated extension of infrastructure services.
2. Design includes complete community attributes	<ul style="list-style-type: none"> • Incorporates nature • Neighborhood retail • Provides amenities that cannot be located in existing Sherwood 	X			<ul style="list-style-type: none"> • A “Gateway to Wine Country” could help facilitate tourism opportunities through lodging, a visitor center and wine-related commercial uses. • Small scale retail serves neighborhoods within walking distance • An integral trail system provides safe, convenient and comfortable non-motorized connections between all districts, the existing Sherwood trail system and historic downtown.
3. 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 	X			<ul style="list-style-type: none"> • Development is “nestled” into the rich landscape of creeks, valleys and hillsides. • Neighborhoods are walkable and accessible.
4. Concepts promote health	<ul style="list-style-type: none"> • Walking, bicycling easy to access • Access to transportation choice, transit 	X			<ul style="list-style-type: none"> • Walking trails connect neighborhoods to parks, schools and the Athletic Field. • Neighborhoods are organized around nature. • Roads are multimodal boulevards serving pedestrians, cyclists and motorists.
5. Development protects and provides access to nature	<ul style="list-style-type: none"> • View corridor, other assets protected • Walking trails along heritage resources 	X			<ul style="list-style-type: none"> • Edy/Elwert realignment avoids the sensitive confluence of streams. • Development respects topography and wide riparian buffers.
6. Implementation is pragmatic	<ul style="list-style-type: none"> • Options minimize cost of infrastructure • Balance of benefits and burdens of development 		X		<ul style="list-style-type: none"> • Reduced commercial may yield less revenue for infrastructure. • Realignment Edy/Elwert appears to be less costly than bringing the current facilities up to urban standards.

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.

Low: Satisfactory performance. Plan must incorporate additional considerations to meet the goal.