



AGENDA

Thursday, April 25, 2013 - 10:00 AM

Board of County Commissioners Business Meeting

Beginning Board Order No. 2013-25

I. CALL TO ORDER

- Roll Call
- Pledge of Allegiance
- Approval of Order of Agenda

II. CITIZEN COMMUNICATION *(The Chair of the Board will call for statements from citizens regarding issues relating to County government. It is the intention that this portion of the agenda shall be limited to items of County business which are properly the object of Board consideration and may not be of a personal nature. Persons wishing to speak shall be allowed to do so after registering on the blue card provided on the table outside of the hearing room prior to the beginning of the hearing. Testimony is limited to three (3) minutes. Comments shall be respectful and courteous to all.)*

III. PRESENTATION *(Following are items of interest to the citizens of the County)*

1. Presentation of the PreventNet System by Northwest Family Services (Rod Cook, Children, Youth and Families)

IV. READING AND ADOPTION OF PREVIOUSLY APPROVED ZDO ORDINANCE

(No public testimony on this item)

1. ZDO-242 – An Ordinance Amending Chapter 4 and Appendix B of the Clackamas County Comprehensive Plan - Relating to Population Forecast (Rhett Tatum, County Counsel) – *Public Hearing was held March 20, 2013*

V. DISCUSSION ITEMS *(The following items will be individually presented by County staff or other appropriate individuals. Citizens who want to comment on a discussion item may do so when called on by the Chair.)*

–NO DISCUSSION ITEMS SCHEDULED

VI. CONSENT AGENDA *(The following items are considered to be routine, and therefore will not be allotted individual discussion time on the agenda. Many of these items have been discussed by the Board in Study Session. The items on the Consent Agenda will be approved in one motion unless a Board member requests, before the vote on the motion, to have an item considered at its regular place on the agenda.)*

A. Health, Housing & Human Services

1. Approval of a Behavioral Health Services Agreement with Lutheran Community Services for Outpatient Substance Abuse Services and Outpatient Mental Health Services - *BH*

B. Department of Transportation & Development

1. Resolution No. _____ Declaring the Public necessity and Purpose of Acquisition of Rights-of-Way and Easements for the Barlow/Zimmerman Intersection Improvement Project and Authorizing Negotiation and Eminent Domain Actions
2. Approval of Amendment No. 3 to the Supplemental Project Agreement No. 25070 between Clackamas County and the Oregon Department of Transportation for Barlow Road – Zimmerman Road Intersection
3. Accepting the Traffic Safety Commission's 2012 Annual Report

C. Elected Officials

1. Approval of Previous Business Meeting Minutes – BCC

VII. WATER ENVIRONMENT SERVICES

1. Approval of a Joint Funding Agreement between Clackamas County Service District No. 1 and the US Geological Survey Department of the Interior for the Hoodland Wastewater Pollution Control Plant Effluent Outfall Alternatives Discharge Study
2. Approval of Amendment No. 1 to the Consultant Services Agreement with KRS Consulting for the Asset Management Program for Clackamas County Service District No. 1, Tri-City Service District and

VIII. COUNTY ADMINISTRATOR UPDATE

IX. COMMISSIONERS COMMUNICATION

NOTE: Regularly scheduled Business Meetings are televised and broadcast on the Clackamas County Government Channel. These programs are also accessible through the County's Internet site. DVD copies of regularly scheduled BCC Thursday Business Meetings are available for checkout at the Clackamas County Library in Oak Grove by the following Saturday. You may also order copies from any library in Clackamas County or the Clackamas County Government Channel.

<http://www.clackamas.us/bcc/business.html>

COPY

Cindy Becker
Director

April 25, 2013

Board of County Commissioner
Clackamas County

Members of the Board:

Presentation by Northwest Family Services

Purpose/Outcomes	To provide the BCC and general public information about PreventNet
Dollar Amount and Fiscal Impact	N/A
Funding Source	N/A
Safety Impact	N/A
Duration	N/A
Previous Board Action	BCC allocated \$100,000 in FY 12-13 to fund PreventNet Sites and a portion of the Drug & Alcohol interventions.
Contact Person	Northwest Family Services- Cindy Bankston Children, Youth & Family Services, Division – Rod Cook 503-650-5677
Contract No.	N/A

BACKGROUND:

Northwest Families Services is one of three local non-profits that Children, Youth & Families Division contracts with to provide PreventNet Services. Northwest Families Services will provide an overview of the services and outcomes it has experienced at the four sites that it implements.

PreventNet History

The Children, Youth & Families Division created the PreventNet System in 2001 as a community/school-based service system designed to improve outcomes for children and their families by creating a web of support among schools, non-profit agencies, community members, local businesses, and local government. These sites identify at risk youth and provide coordinated care for intensive services related to academic and behavioral issues. This support includes evidence-based prevention and early intervention services provided in the school setting aimed at improving protective factors (building nurturing relationships with positive role models, improving attachment to school, building leadership and problem-solving skills, and participation in extra-curricular activities), and reducing risk behaviors (poor school performance, truancy, family management problems, alcohol and other drug use, poverty/homelessness, and negative peer association). These sites also enable the Juvenile Department to build capacity by enhancing services to provide cognitive skill groups. Under the PreventNet model, services are provided both during school hours as well as after-school.

PreventNet Sites

There are currently 10 PreventNet sites in Clackamas County, 9 of which are fully funded by the county through the Children, Youth & Families Division (CYF). The sites fully funded by CYF include 2 elementary school sites (Lot Whitcomb Elementary in Milwaukie and Sandy Grade School in Sandy), 6 middle school sites (Alder Creek MS in Milwaukie, Cedar Ridge MS in Sandy, Estacada Jr. High in Estacada, Gardiner MS in Oregon City, Kraxberger MS in Gladstone, Molalla River MS in Molalla), and 1 high school site (Rex Putnam HS in Milwaukie). The Canby site is currently funded by

another agency. In addition to the State funding for the PreventNet sites, CYF leverages drug and alcohol funds to add Drug/alcohol prevention specialist services at each of the sites.

Each site is the result of collaboration between CYF, the school, and a local non-profit agency. The non-profit delivers the services, and houses the program staff, which includes a program director, a site coordinator, a prevention specialist, and activity leaders.

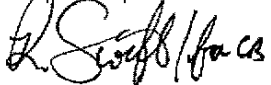
Future of PreventNet

As of June 30, 2013, funding from the State of Oregon's Commission System is being redirected to align with the goals and objectives of the Oregon Education Investment Board (OEIB). The overall annual reduction to the Children Youth & Family Division is \$1,415,052, of which \$434,206 was allocated to support eight of the ten existing PreventNet sites. Negotiations with the Governor's Office and the legislature regarding the future of this funding are occurring.

*Documents provided by Northwest Family Services are attached.

RECOMMENDATION:

Accept the presentation


Respectfully submitted,

Cindy Becker, Director

HOW CAN I BE A PART OF PREVENTNET?

The parents or legal guardian of students can simply fill out a registration form and return it to the PreventNet Site Coordinator or Prevention Specialist.

- CASE COORDINATION
- AFTER SCHOOL PROGRAMS
- PARENTING EDUCATION
- FAMILY EVENTS
- SOCCER TOURNAMENTS
- SUMMER ACTIVITIES, DAY CAMP, AND PHOTO VOICE



ACKNOWLEDGEMENTS:



KRAXBERGER MIDDLE SCHOOL

Thank you to Clackamas County Children, Youth and Families Division for funding and supporting PreventNet sites.



www.nwfs.org
www.itslegit.org

PREVENTNET



Northwest
Family Services

6200 SE King Road
Portland, OR 97222
www.nwfs.org
503-546-6377 (main)
503-546-9397 (fax)

WHAT IS PREVENTNET?



PreventNet is a coalition of social service agencies that are working together to create, enhance, and sustain a seamless system of care, advocacy and supports for the well-being of children, youth, and families in Clackamas County.

PreventNet Community Schools represent a partnership between local schools and community service providers to improve academic success and reduce juvenile delinquency.

Northwest Family Services administers PreventNet sites at Gardiner Middle School in Oregon City, Kraxberger Middle School in Gladstone, and Alder Creek Middle School and Rex Putnam High School in Milwaukie.

Critical components to PreventNet are:

- Improving students' academic success.
- Increasing community collaboration and involvement.
- Increasing family involvement.
- Establishing community engagement among community-based agencies, government and schools.

PreventNet is funded by grants through Clackamas County Children, Youth and Families Division.

UNIVERSAL YOUTH



Case Coordination

Weekly meetings with students throughout the school year to develop a "Person Centered Plan," providing support and advice for academic and social success.

After School Programs

After school activities such as academic help, sports, crafts, robotics, cultural activities, dance, gardening, and more.



Parenting

Education

Classes for parents offered throughout the year on topics such as family connection, family finances management, and drug, alcohol and gang prevention.

CORE YOUTH



Family Events

Family-friendly events promoting family unity and connection with the school.

"Gritale Soccer"

Tournament

A short soccer tournament in late Spring for high school teams. Youth will use their energy and time in a positive way.



Summer Activities



An up to eight week summer program offering fun and positive activities, such as summer recreation programs, field trips, PhotoVoice, Summer

Day Camp and activities during summer lunch programs.

Clackamas County PreventNet System

Intervention Model and Outcomes

PreventNet is modeled after the Extended-Service Schools Initiative, a promising practice endorsed by the Office of Juvenile Justice and Delinquency Prevention. Components of the model include after-school activities, academic skills enhancement, community awareness and mobilization, conflict resolution and interpersonal skill development, leadership and positive youth development, and mentoring. While the model is designed to operate in school buildings, program funding is managed through a partnering organization. A national evaluation of the ESS methodology demonstrated positive outcomes for youth in four key areas: staying out of trouble, improving school attitudes and behavior, strengthening social networks, and improving self-efficacy and self-esteem.

PreventNet History

The Children, Youth & Families Division created the PreventNet System in 2001 as a community/school-based service system designed to improve outcomes for children and their families by creating a web of support among schools, non-profit agencies, community members, local businesses, and local government. This support includes evidence-based prevention and early intervention services provided in the school setting aimed at improving protective factors (building nurturing relationships with positive role models, improving attachment to school, building leadership and problem-solving skills, and participation in extra-curricular activities), and reducing risk behaviors (poor school performance, truancy, family management problems, alcohol and other drug use, poverty/homelessness, and negative peer association). *Under the PreventNet model, services are provided both during school hours as well as after-school.*

PreventNet Sites

There are currently 10 PreventNet sites in Clackamas County, 9 of which are fully funded by the county through the Children, Youth & Families Division (CYF). The sites fully funded by CYF include 2 elementary school sites (Lot Whitcomb Elementary in Milwaukie and Sandy Grade School in Sandy), 6 middle school sites (Alder Creek MS in Milwaukie, Cedar Ridge MS in Sandy, Estacada Jr. High in Estacada, Gardiner MS in Oregon City, Kraxberger MS in Gladstone, Molalla River MS in Molalla), and 1 high school site (Rex Putnam HS in Milwaukie). CYF funds drug and alcohol prevention specialist services at a site in Canby that currently receives private funding.

Each site is the result of collaboration between CYF, the school, and a local non-profit agency.

Populations Served

Under the current model, priority intensive services are planned for "core" youth, while "universal" youth receive basic services. At every PreventNet site, a Site Coordinator manages a caseload of 25 "core" youth (average daily population), who receive intensive services related to academic and behavioral issues based on a case management model as well as organizes academic skill building and enrichment activities and events for a minimum of 100 "universal" youth [See PreventNet Programming Structure – see table below].

At all middle and high school sites, a Prevention Specialist organizes drug and alcohol prevention services, curricula, and events for a minimum of 100 "universal" youth, and intensive case management to 15 "core" youth (average daily population) at high risk of drug/alcohol abuse [See PreventNet Programming Structure – see table below].

PreventNet Outcomes

During fiscal year 2011/2012, the PreventNet services were provided to a total of 247 "core" youth (averaging 27 children/youth at each site), with a success rate of 90% as measured by improvement on academic, behavioral, peer issues, etc. Prevention Specialists at the middle and high school sites served a total of 128 "core" youth (averaging 16 youth at each site), with an 89% success rate in terms of reduction of drug and alcohol risk factors and use.

Together, the 2 positions at the 10 sites served over 12,000 participants with "universal" services and activities (these are likely duplicated numbers, as youth participate in multiple activities and events at each site. Family members are also counted in this total, as they participate in many of the events).

PreventNet Budget

CYF currently allocates a total of \$434,206 in State General Funds to contract for PreventNet services at 7 middle and 1 high school sites. Clackamas County provides another \$100,000 to fund early learning services at 2 elementary school sites. The averaging funding per site is \$55,500.

PreventNet Programming Structure			
Clackamas County Children, Youth & Families Division System development and oversight, fidelity to ESS model			
Local Non-Profit Agencies: Metropolitan Family Services, Northwest Family Services, Todos Juntos Program management			
PreventNet Site Coordinator and Prevention Specialist			
CORE		UNIVERSAL	
PreventNet Services	Prevention Specialist Services	PreventNet Services	Prevention Specialist Services
<p>25 ADP</p> <p>“Core” eligibility determined by having 1 or more academic, behavioral, socioeconomic, negative peer association risk factors</p> <p>One-on-one weekly (minimum) check-in with each youth to develop a case plan and set goals for improvement</p> <p>Referral to services and assistance related to academic and/or behavioral risk factors and needs and regular follow-up</p> <p>Participation in universal services and activities</p>	<p>15 ADP</p> <p>“Core” eligibility determined by having 1 or more drug/alcohol risk factors</p> <p>One-on-one weekly (minimum) check-in with each youth to develop a case plan and set goals for improvement</p> <p>Referral to services and assistance related to drug/alcohol risk factors and needs and regular follow-up</p> <p>Participation in universal services and activities</p>	<p>100 served (minimum)</p> <p>No assessment or eligibility necessary – attendance measured by sign in sheets or attendance</p> <p>Typical activities include: Tutoring, homework club, Lego Robotics, sports, art, recreation, family events, school assembly events, cooking classes, girl’s groups, boy’s groups, etc.</p>	<p>100 served (minimum)</p> <p>No assessment or eligibility necessary – attendance measured by sign in sheets or attendance</p> <p>Typical activities include: Family Day, Red Ribbon Week events, Prevention Awareness Day, Health Fairs, Awareness walks, anti-stigma campaigns, Above the Influence, PhotoVoice</p>

Ryan's Story

Male, 13, 8th grade: "Ryan," an only child, has experienced a lot of trauma throughout his young life. Because of his parent's struggle with addiction, Ryan has endured challenges including poverty, family conflict leading to severe domestic violence, neglect, abuse and even homelessness. His school attendance and academic success were seriously compromised. Thankfully, however, his mother who is now largely raising him alone is well along in her recovery process and has taken advantage of many opportunities to learn and grow with the help of a variety of community resources available to her.

Northwest Family Services' (NWFS) PreventNet staff at Ryan's school became aware of his need for support and provide regular case coordination. In addition to setting goals and gaining appropriate referrals for Ryan and his mother, Ryan's case coordinator made sure he was enrolled in various activities and after school programs. Ryan's untapped musical interest was identified and he was enrolled in classes of interest. He participated in several summer activities NWFS provided including PhotoVoice and the Summer Adventure Camp which he indicated were the highlights of his summer.

Ryan's housing situation recently experienced some upheaval resulting in a move for him and his mother. When they went to the school to obtain his records for a school transfer, the school counselor noticed a marked and improved difference in Ryan and attributed it, largely, to his involvement with NWFS PreventNet services. The family was purposeful about trying to find another school so that Ryan could continue receiving services. Ryan was accompanied by his case coordinator to last year's 8th grade recognition to support his friends and was inspired to work diligently to be one of those celebrated this coming spring when he will be cheered on by the individuals, including NWFS staff, who have helped him get there.

Female, 8th grade, age 13: Jada had been a victim of child sexual abuse and so her father was arrested on Christmas Eve for sodomy and other crimes and was removed from the home. Her mother was relatively unengaged with Jada and her siblings. As a result of her father's absence from the home and her mom seeming to not care, Jada's home life was consequently very unstable and chaotic. Jada felt unsupported by most adults and the administration at her middle school became aware of her situation. She was referred to Northwest Family Services' PreventNet staff for case coordination and they began working with her one-on-one. Jada began attending after school programming staffed by our PreventNet staff in her school and seemed happy to have a refuge from her unhappy home life and to get some help with her homework as well. Jada found our PreventNet staff to be very sympathetic, reliable, caring, and safe. She checked in with the PreventNet staff several times a day just to let them know how her day was going.

They have been there to support her during this very tough time and encourage her when things seemed to be going better for her. Jada had become sick with the flu and had missed classes and fallen behind in her school work. This week, Jada told our PreventNet Coordinator that she was struggling to catch up in some of her classes and she felt that some of her grades were likely falling. Our site coordinator was able to pull Jada's grades and see the areas where she possibly needed some extra help. Math seemed to be the biggest area where Jada needed some extra support. Our site coordinator suggested that she go and talk with the teacher about what was necessary for her to do in order to bring up her grades. Jada indicated that she was quite uncomfortable and a little scared to go talk with him by herself. The site coordinator offered to go with her to speak with him, which she did. The teacher was very warm and encouraging and gave some recommendations for what Jada needed to do to improve her grade, and emphasized that she could come talk with him any time about her math studies from his class. Our site coordinator was able to bridge the gap and help support Jada when there was no other adult in her life to support her. By offering this support in the work that NWFS is doing through PreventNet, we were able to help Jada and keep her situation from escalating and becoming more serious.

2

ORDINANCE NO. ZDO-242

**An Ordinance Amending Chapter 4 and Appendix B of the
Clackamas County Comprehensive Plan**

WHEREAS, state law identifies Clackamas County as the coordinating body for its five rural cities of Barlow, Canby, Estacada, Molalla and Sandy and requires the coordinating body to establish and maintain a 20-year coordinated population forecast for the cities; and

WHEREAS, the County's Planning and Zoning Division received a grant in January 2012 from the Department of Land Conservation and Development to complete the 20-year coordinated population forecasts consistent with ORS 195.036 and OAR 660-024-0030; and

WHEREAS, the Planning and Zoning Division completed this coordinated effort in January 2013 and reached agreement with all five cities as to the 20-year forecast results; and

WHEREAS, the Planning Director initiated an amendment to Chapter 4 of the Comprehensive Plan to adopt the 20-year coordinated population forecasts for the five rural cities, and

WHEREAS, the Department of Land Conservation and Development has been duly noticed of the proposed amendments; and

WHEREAS, the proposed amendments are consistent with the Clackamas County Comprehensive Plan, the Statewide Planning Goals and Guidelines and all other applicable state and federal laws and regulations; and

WHEREAS, after a duly-noticed public hearing, the Clackamas County Planning Commission recommended approval of ZDO-242 on February 25, 2013; and

WHEREAS, after a duly-noticed public hearing, the Clackamas County Board of County Commissioners approved ZDO-242 on March 20, 2013;

The Board of Commissioners of Clackamas County ordains as follows:

Section 1: The Clackamas County Rural Cities Population Coordination Background Report and Forecasts, Final: March 12, 2013, hereto attached as Exhibit B, are hereby adopted.

Section 2: Chapter 4 and Appendix B of the Clackamas County Comprehensive Plan are hereby amended as shown in Exhibit A, hereto attached.

Section 3: This ordinance shall be effective on July 1, 2013.

ADOPTED this 25th day of APRIL, 2013

BOARD OF COUNTY COMMISSIONERS

Chair

Recording Secretary

BOARD OF COUNTY COMMISSIONERS LAND USE HEARING MINUTES

Wednesday, March 20, 2013 – 9:30 AM

Public Services Building – 2051 Kaen Rd., Oregon City, OR 97045

A complete video copy and agenda of this meeting can be viewed at - <http://www.clackamas.us/planning/landuse.html>

Commissioner Present:

Commissioner John Ludlow, Chair
Commissioner Jim Bernard
Commissioner Paul Savas
Commissioner Martha Schrader
Commissioner Tootie Smith

Staff Present:

Martha Fritzie, Planning and Zoning:
Mike McCallister, Planning and Zoning
Rhett Tatum, County Counsel

File No. ZDO-242 – Rural Cities Population Coordination

Chair Ludlow:

Welcome ladies and gentlemen. I now call to order this March 20, 2013 public hearing to consider amendments to the Clackamas County Comprehensive Plan. Before we begin I invite you to rise and join me in the Pledge of Allegiance.

Pledge of Allegiance

Today we will consider ZDO-242, a text amendment to the Comprehensive Plan which would adopt 20-year coordinated population forecasts for Clackamas County's five rural cities, Barlow, Canby, Estacada, Molalla and Sandy. This hearing will proceed as follows: We will first hear the staff presentation from Senior Planner Martha Fritzie. Next I will open the hearing for public testimony, beginning with public officials and will have five minutes each. Then the representatives from recognized community planning organizations and agencies will have five minutes each and finally other people wishing to testify will have three minutes each. If you wish to testify, please complete one of the green cards and give it to Caroline. She will be our clerk today. If you've prepared a written statement, please give a copy to Caroline and use your time to summarize what you have written. Everyone who wishes to speak will have an opportunity to do so. We will now hear from Senior Planner Martha Fritzie.

Martha Fritzie:

Hi, good morning, I'm Martha Fritzie with the Planning and Zoning Division and we're here to discuss Planning File No. ZDO-242. As Chair Ludlow stated, this is a proposed Comprehensive Plan text amendment.

It would adopt 20-year population projections for the cities of Barlow, Canby, Estacada, Molalla and Sandy and it would add the background and forecast report listed up there into Appendix B of the Comprehensive Plan which just lists supporting documents to the Plan. To start out I'm going to give you a little bit of quick background about why we're doing this. State Statute stipulates that the coordinating body establish and maintain 20-year coordinated population forecasts for the cities within its jurisdiction. Clackamas County is the coordinating body only for the rural cities. Metro is the coordinating body for the urban cities within their boundary in the County and today the County has not coordinated forecasts for its rural cities. Why does this matter? Well, the rural cities would like to plan for more growth, for the appropriate amount of growth I guess we should say. This coordinated population number needs to be used in the assessment of the urban growth boundaries and having a realistic forecast allows them to more efficiently invest in their infrastructure and to make the process to expand the urban growth boundary more efficient should they show a need and just in general to better plan for an appropriately sized urban growth boundary to accommodate growth. It also allows us all to be in compliance with state law.

Why are we doing this right now? Well the cities have been asking us to for several years. Absent this forecast to do any urban growth boundary and land use planning they have to use a safe harbor number which is not – it's not a realistic forecast for each of their cities. It doesn't account for anything, any historic growth or anything going on in the cities themselves and over the last two years the County has been working with Metro, their coordinating forecast for their area and we saw the opportunity to use some of the outputs and some of the numbers coming out of there. It's called the Metro Scope Model and we decided rather than having to hire a consultant we could be a little more efficient, cost effective, in doing this process right now using those numbers as a basis and the state also has been encouraging the County to do this for awhile and about a year ago we received a grant to complete all of this work. So, just a few caveats before we move forward and talk about the methodology. In the actual forecast, just bear in mind these are long-range forecasts. They are essentially our best educated guess. Forecasts are not expected to be 100% accurate and in fact in the Administrative Rules, it states that, although it should be based on the best available information, they should not be held to an unreasonably high level of precision. We do try to factor in – consider as many factors as possible to make this best guess and particularly in small areas like the rural cities in the County, forecasts are even less certain because they're more affected by events like a large subdivision coming in or the loss of an employer and some of those things you cannot anticipate and over the long run the hope is that it evens out and you can make your best guess and understand what the city is trying to do and what's been going on in the city to project what may happen in the future.

So, to begin this process, we looked at the forecast numbers coming out of the Metro Scope Model. They projected numbers from 2010 to 2035. That's the forecast that we are using. They split it into urban and rural what we consider control totals and we were using the rural control total as a basis. They further split their forecast down by what's called transportation area zones.

Now these transportation area zones or TAZs don't actually correspond with the boundaries of cities or urban growth boundaries so we first looked at the transportation area zones that encompass each of these cities and an assumption was made that the majority of the growth that it was expected to go into that area would actually occur within the city, mostly out of necessity because rural zoning outside of the cities doesn't allow for very much growth at all. This map is intended to just sort of just be an illustration of – to help you understand this assumption and the transportation area zones, for example, for Canby, are cross-hatched this way. There's five of them and you can see they encompass a much larger area than the city. Well a lot of this area is farmland or rural residential zoning and can't realistically accommodate a whole lot of growth so the assumption is that most of the growth that's projected in these large transportation area zones will actually occur within the city limits. And there's similar maps in your packet for the other cities in the rural area.

Each city's forecast was then evaluated against actually what was happening in the city and looking at historic growth I had a lot of conversations with planners, city managers and/or mayors within these cities to understand infrastructure limitations, if they're aware of any, any current planning efforts that were going on. I was actually fairly impressed by a number of these cities. There were a lot of economic development activities going on. The cities have recognized that they really need to provide for and encourage more jobs growth to be able to accommodate the population growth, that they have both been seeing and would like to see and also any development projects that are on the horizon or business expansions. All of those things were factored into the analysis of the forecasts for each city and some adjustments were made to two of the cities based on this information and also based on looking at the amount of growth that was projected and some of the other transportation area zones in the vicinity of the cities which seemed high, given the zoning that's in that area.

And the final step was to extrapolate the actual 20-year forecast which runs from 2012 to 2032 and that timeframe was stipulated by the grant that we received. We were specifically asked to provide the forecast for that 20-year period. All of this was done while coordinating with the cities. About a year ago it started with a group meeting with the cities. We have given the cities several opportunities to provide feedback on the drafts. I've met individually with the cities and as of January or February they all had either voiced or sent written letters in agreement of these forecasts.

So let's talk about the forecasts. From 2010 to 2035, Metro is projecting an increase of approximately 58,000 households, County-wide. Metro does project households because they're interested in housing units for transportation purposes. This forecast – I don't know if you all are familiar with the urban growth report that came out in 2009 where there was a range forecast and at the time metro was looking – pegging at growth right near the middle of that range I believe. This forecast actually, if you look at the urban household growth versus that one, falls right at the low end of that range so they seem to have backed off of the forecast a little bit from that period of time.

The one thing that is interesting about this forecast is that it's projecting a fair amount of growth in the rural areas and one of the reasons is because there's an assumption made that there will be very little new land in Clackamas County brought into the Metro Urban Growth Boundary and the effect of that is – one of the effects of that is that growth will go out to the cities and, in fact, as housing prices went up over the last decade, we saw this happening because the cities offer more affordable housing stock than the urban cities do and so over the last decade the three cities of Canby, Molalla and Sandy actually captured 25% of the growth in the County and combined those three cities make up only about 8% of the population overall in the County. So, there's evidence that this kind of growth has been happening and given the assumptions that were made for the urban growth boundary and also all the efforts that these cities are making to encourage growth and encourage economic growth, we feel that strong growth will continue in these cities.

So the forecast for the five cities that we're proposing to adopt are listed in the table above. The City of Barlow as you all probably know - is very small. It's limited; it does not have sewer service. It's not expected to become any more dense or grow at any extraordinary rate. Canby, however, has been working very hard. They have undertaken a lot of economic development activities. They are really anticipating a lot of strong growth and they've shown strong growth and so their average annual growth rate for the next – oh, that's still a typo in there. I apologize. That should be 2012 to 2032 at the last column of the table. But their average annual growth rate is projected at 2.3%, which is in line with historic growth. You know, growth in these small cities jumps up and down over the last decades and if you look at overall trends, their growth rates have all been – these last four cities – have all been 2% or above. Some of them even as high as 4% over the last several decades.

Chair Ludlow:

That's a year?

Martha Fritzie:

That's the annual growth rate, yes. That's per year. Estacada is also expecting fairly strong growth although they weren't one of the three cities that experienced really strong growth over the last decade. They were one of the few cities that actually has been issuing more building permits at the end of the last decade than they were during the housing boom and they have a lot of subdivision land and a lot of residential land that's in various stages of being ready to develop and they're seeing a lot more interest from developers in the recent years so we expect that they will post a little bit stronger growth than they had in the last decade. Molalla is looking at about 2% growth, annual growth over the last 20 years, which is in line if not a little bit lower than the rate that they've been experiencing and Molalla is in the middle of trying to update a lot of their plans and have informed us that they are running low of residential land and so their growth – we expect there will be a lot of demand and will be strong but they have a little bit of work to do before they can accommodate this kind of growth. Sandy seems to be going strong and grew at about 6% annually over the last decade and they are expecting to continue that strong growth and again they've been working hard to facilitate more economic development and to accommodate continued strong residential growth.

So, these are the forecasts. As I stated, the cities have agreed. We have letters of support which are attached as exhibits to your packet from Canby, Molalla and Sandy. I do have verbal agreement from Barlow and Estacada. I could not manage to get them to write it down for me. As we stated earlier also, this is a legislative comprehensive plan text amendment. As such it needs to meet – it needs to be consistent with the following criteria: The Statewide Planning Goals, the listed County Comprehensive Plans Goals and Policies which are largely procedural and the following State Statutes and Administrative Rules and the State Statutes and Administrative Rules essentially outline or establish that the County needs to do this and that the forecasts need to be developed using commonly accepted practices, need to consider local trends and other, you know, relevant factual information and that they need to be, you know, based on current reliable and objective sources and we feel all of that was done. In fact, we feel that all of the Planning Goals, Comprehensive Plan Goals and relevant State Statutes and Administrative Rules have all been met in this case. We held a public hearing in front of the Planning Commission on February 25 to discuss this. The Planning Commission recommended approval of this proposal in a unanimous vote. There were a few minor edits to the report that they recommended but no substantive changes. Planning Staff also recommends approval as recommended by the Planning Commission and that's the end of my presentation. Any questions?

Chair Ludlow:

Thank you Martha. Any question by Commissioners? Yes, Jim . . .

Commissioner Bernard:

So I have a comment and a question. One is that one of the things that got us stimulated to move forward on this was a proposal by one of our cities for an extremely large population growth, far exceeding anything any of us would ever have imagined, thank goodness, and so they were required to go to safe harbor and this gives communities such as the one that had the application actually something to work towards. My question is, so state law requires a 20-year reserve that the community can expand and must preserve a 20-year supply of land for the community, correct? So does this mean that now, once we adopt this, that our communities, such as Molalla, could actually start expanding their borders to accommodate the potential growth that this plan would demonstrate?

Martha Fritzie:

Yes, it does. This population number is the number that they would have to use to evaluate their urban growth boundary and how much land is needed inside the urban growth boundary, how much exists, and how much the difference is. There's a lot of analysis involved but this is certainly a starting point for them.

Commissioner Bernard:

Okay, thank you.

Commissioner Savas:

You mentioned earlier, as far as maybe one of the reasons speculating one of the reasons about why people are moving more out to the rural areas and – could you elaborate as to maybe any other information or rationale as to why folks are doing that?

I mean I read the January 2010 – I believe it was January 2010 – report from Metro the population forecast and I know that the forecast that they projected then has been adjusted but in there was, you know, really I think, with the market, maybe the market demands are not necessarily locally but nationally and I didn't know if that was a factor. You mentioned that – well why don't you just elaborate as far as to what you think that rationale is, that people are moving, choosing rural at a higher growth rate than urban.

Martha Fritzie:

Well, I think there's several reasons. One of the reasons is the housing price and as housing prices went, rose rapidly over the last decade, the rural cities developed similar housing at lower prices. I think that will probably continue. That's actually one of the factors that goes into Metro's model. There's a lot of market factors and one of them is what happens to housing prices and they're projecting fairly high growth in housing prices if their urban growth boundaries held pretty consistent. And, I mean, I don't know. To some extent it's a personal choice. I think that these communities are spending money and time trying to sort of reinvent themselves from, in some cases, lumber towns, to a little more modern, more jobs, an upgraded downtown, just a more attractive community to live in and I think that some of them have succeeded in that.

Commissioner Bernard:

I just wanted to add of course we have an aging population. I think that one of the gentlemen at the Molalla Town Hall meeting last night said that, when he retired he took advantage and moved out into the country. He had a desire to do that and I've actually spent some time looking at a farm for some day in the future out in the country too 'cause, you know, his roots was at the farm and my roots are at the farm so I mean it's kind of something going back to your roots kind of a thing that I think is true with a lot of the aging population. So I'd say that's a factor too.

Chair Ludlow:

Martha, you know the requirement by law is to maintain a 20-year population forecast and I see that here. But how often does this have to be adjusted. I mean certainly some things, let's say two to three, four years can dramatically change the impact that we see here now and differ from the forecast which we have so are we required, or is anybody required to do an update and at what interval?

Martha Fritzie:

There's no actual requirement to do an update. It would be wise to do an update. You know Metro looks at it every five years. It seems like a reasonable interval. Some of it's dependent upon funding and the situation at the time. I mean we would like to be able to maintain it and look at it every five years or so.

Chair Ludlow:

Everything is dependent upon funding. But we'll look for that grant from DLCD and, you know, do a five-year update and I'm sure we'll get along great. Any more questions from Commissioners?

Commissioner Savas:

I just have one. Maybe you said it earlier. What is the projected growth average inside the UGB?

Martha Fritzie:

Oh, that's a good question. I'll have to look that up. But they may not have that in my report. I know County-wide, it's just under 1 ½% annually, which equated to about 58,000 households.

Commissioner Savas:

58,000?

Martha Fritzie:

Yes, roughly. Bear with me.

Commissioner Bernard:

Well Milwaukie's growth, you know, and all the time I've been there, was around 2% and, you know, it's been pretty steady. You can almost recognize the new people.

Commissioner Savas:

While she's looking that up I think one of the, if it is, let's say 1% or 1 ½% or half of what we project, let's say Sandy is then it's definitely to me put some emphasis on infrastructure and transportation and I'll say that compared to other rural counties like – and I know that we're urban and rural but Hood River County, for example, their rural roads will last dozens of years it seems and – 'cause they don't have the traffic going in and out of the urban area and the jobs and this, if the growth rate is going to be greater on the outside, I would forecast that we need to get a greater investment. It almost reinforces a different act, whether it's an area commission on transportation, a rural area or whether the joint regional area but somehow I think we really need to re-examine how we invest in the road system in this County and not ignore the rural need and whether it's maintenance or capital and frankly I think it's both, but we really need to address that and other infrastructure 'cause Estacada is having, you know, an issue with their waste water treatment and as if they grow at this rate from the water standpoint, wastewater standpoint, all that, I think it's really incumbent upon us to really take a greater look at all that infrastructure and how we manage that.

Commissioner Schrader:

Yeah, and actually this isn't new for me in particular because I remember having this conversation years ago with what we call the satellite cities and the fact that with the Metro UGB, this normally would happen that we'd start seeing satellite cities starting to expand and I agree with Commissioner Savas that the emphasis on infrastructure so they can grow appropriately. We have a role in that, particularly rural transportation and I think it's one of the great limiters these cities have because you don't just want, you know, the 20-year buildable land supply is only for residential growth am I correct or is for commercial industrial?

Martha Fritzie:

For jobs also.

Commissioner Schrader:

So it includes industrial and commercial land.

Martha Fritzie:

Yes.

Commissioner Schrader:

Okay. So as they need those lands to maintain a stable tax base, then it's incumbent upon us to work with them on the infrastructure that they need.

Commissioner Bernard:

I think actually Paul's comment is a great one because when we're talking about the creation of the Act within these areas, Commission on Transportation, this is actually a very good argument for why that area should have one because this is an area unserved by an Act so I think that's something we ought to make sure that Kennemer I believe has a Bill to create an Act, along with Chuck Thompson, Senator Thompson. We ought to make sure they get this information so that they could use that to get that hearing we're waiting for.

Commissioner Savas:

Did you ever find a number?

Martha Fritzie:

So I'm told we think it's around 1.7% inside the UGB, total. And just, if I can throw out there, I am also involved in the TSP update, the Transportation System Plan update. These numbers are the same numbers that will be used for those purposes.

Chair Ludlow:

All right, I'm going to open the public testimony portion of the hearing. Are there any public officials who wish to testify? You'll be given five minutes each. Are there any representatives from CPO or agencies that wish to testify? I will call the names of the people who submitted a green card – no green cards. I'm going to close the public testimony portion of the hearing. Any further discussion by the Commission? Call for a motion.

MOTION:

Commissioner Bernard:

I move we approve ZDO-242 as recommended by the Planning Commission and staff.

Commissioner Schrader:

I second.

Chair Ludlow:

It's been moved by Commissioner Bernard, seconded by Commissioner Schrader that we approve ZDO-242 as recommended by the Planning Commission and Staff. The motion is open to further discussion. Any further discussion? I'll ask the Clerk to take the roll.

Commissioner Bernard: Aye.
Commissioner Smith: Aye.
Commissioner Savas: Aye.
Commissioner Schrader: Aye.
Chair Ludlow: Aye.

Passes unanimously 5-0. Now that the amendments have been approved, I will direct staff to draft an ordinance reflecting today's decision and include it on the agenda for this Board's adoption at a future business meeting. Oh, yes – yes, please have a seat and tell us who you are.

Mike McCallister:

Mike McCallister, I'm the Planning Director and I just want to take a couple minutes to acknowledge the kind of success of this project. Martha has been working on this very hard for about a year. We appreciate the grant we got from DLCD and all the cities I think Martha would agree have been very sort of helpful in participating and engaging in this process but mostly I just want to acknowledge Martha's work it's a phenomenal body of work. The report is a combination of taking a whole bunch of technical information, massaging it, figuring out how it works and making it dependable and I think, you know, the Planning Commission made a comment that it's one of the best reports they've ever seen come out of a public body so it's just a great work that I wanted to acknowledge her and I could go on and on about it but I think the success of the project is best measured by the fact that five cities, a Thousand Friends of Oregon and a county have to be agreed, all agreed and that in itself says a lot, so I just want to acknowledge that.

Chair Ludlow:

Thank you Martha, well done. All the Marthas work hard.

Commissioner Schrader:

There you go.

Chair Ludlow:

All right, we're going to close the hearing on ZDO-242. The meeting's adjourned.

Ordinance ZDO-242
Comprehensive Plan Amendments

Text to be added is underlined. Text to be deleted is ~~struck through~~.

LAND USE

When the pioneers settled Clackamas County, the land resource appeared infinite. They cleared forest, carved towns from the wilderness, and used waterways as the arterials of commerce. Some lands were valued for certain uses. The alluvial valley of the Willamette River was among the first areas to be cleared for agriculture. The falls at Oregon City was one of the first industrial sites. From the earliest days, the value of strategic location for various uses of the land was recognized and exploited for man's benefit. The best sites were usually used first.

Now we realize that not only is land finite, but also that sites with desirable characteristics for certain types of development are scarce. A growing population is increasing demand for land of all types. It is increasingly important to evaluate characteristics of remaining sites to determine their optimum use.

The Oregon Legislature has provided for land use to be determined at the local level through a rational process of balancing state and local goals, human needs, and the site characteristics of land. Generally, the factors for designating land use categories in this plan include the following:

- Physical site conditions such as soils, slope, and drainage
- Present and projected needs of the people
- Character of existing development
- Financial impacts on the County and its residents
- Community livability
- Capacities of streets, sewers, water systems, and other facilities
- Estimated market demand
- Parcel sizes
- Availability of transit
- Proximity to jobs, shopping and cultural activities
- Providing an adequate balance between various uses

The above factors alone are insufficient for planning a community. A planning process reflecting community values is needed to weigh various factors. This systematic approach involves identifying issues, developing alternative ways of dealing with the issues and choosing the most desirable alternative.

ISSUES

The major issues affecting future development in the County are:

1. Supply and location of land for urban uses
2. Density of residential uses
3. Intensity of commercial and industrial uses
4. Proximity of mutually supporting land uses
5. The cost impacts of various land uses
6. Compatibility or conflict between land uses
7. Competing demands for land having certain characteristics
8. Compatibility of city and County plans
9. Supply and location of land for rural uses
10. Preservation of land for agricultural and forestry uses
11. The character and appearance of neighborhoods
12. Compatibility of land use with supportive systems such as transportation and sewerage
13. Protection of natural features and waterways from the impact of development
14. Provision of open spaces within the urban environment.

LAND USE DEFINITIONS

This Plan divides the County into six principal land use categories: Urban, Urban Reserve, Unincorporated Communities, Rural, Agriculture, and Forest. This plan also establishes one or more land use plan designations within each of these categories.

Urban

Urban areas include all land inside urban growth boundaries. Urban areas are either developed or planned to be developed with adequate supportive public services provided by cities or by special districts. Urban areas have concentrations of people, jobs, housing, and commercial activity.

Urban Growth Boundaries: Urban growth boundaries are designated on the land use plan maps. They separate Urban areas from Urban Reserve areas, Unincorporated Communities, and Rural, Agriculture, and Forest areas. An urban growth boundary encompasses existing urban development and lands to accommodate urban growth forecasted for a 20-year horizon.

Immediate Urban Areas: Immediate urban areas are lands that are within urban growth boundaries, are planned and zoned for urban uses, and meet at least one of the following conditions:

1. Served by public facilities, including sanitary sewage treatment, water, storm drainage, and transportation facilities;
2. Included within boundaries of cities or within special districts capable of providing public facilities and planned to be served in the near future; or

3. Substantially developed or surrounded by development at urban densities.

Future Urban Areas: Future urban areas are lands within urban growth boundaries but outside immediate urban areas. Future urban areas are planned to be provided with public facilities, but currently lack providers of those facilities. Future urban areas are substantially underdeveloped and will be retained in their current use to ensure future availability for urban needs. Future urban areas are planned for urban uses but zoned for large-lot, limited development.

Future Urban Study Areas: Future urban study areas are lands that have been brought into an urban growth boundary but for which urban plan designations have not been applied. Planning will be conducted to determine urban plan designations and apply future urban zoning.

Urban Reserve

Urban Reserve areas lie outside an urban growth boundary and have been designated as highest priority for inclusion in an urban growth boundary when additional urban land is needed. Urban Reserve areas may be established pursuant to OAR Chapter 660, Division 21, or pursuant to OAR 660, Division 27. Metro designates Urban Reserve areas in the Portland metropolitan area. The cities of Sandy, Molalla, Estacada, and Canby, in coordination with the County, may designate other Urban Reserve areas.

Rural Reserve

Rural Reserve areas are intended to provide long-term protection for large blocks of agricultural land and forest land, and for important natural landscape features that limit urban development or define natural boundaries of urbanization. Rural Reserve areas shall not be included in an urban growth boundary or Urban Reserve area. Rural Reserves may be established pursuant to OAR Chapter 660, Division 27.

Unincorporated Communities

Unincorporated Communities, as defined in Chapter 660, Division 22 of the Oregon Administrative Rules, are settlements located outside urban growth boundaries in which concentrated residential development is combined with limited commercial, industrial, or public uses. Unincorporated Communities may have limited public facilities and services.

Rural

Rural lands are exception lands, as defined in Oregon Administrative Rules 660-004-0005(1), that are outside urban growth boundaries and Unincorporated Communities and are suitable for sparse settlement such as small farms, wood lots or acreage home sites. They lack public facilities or have limited facilities and are not suitable, necessary,

or intended for urban, agricultural, or forest use.

Agriculture

Agriculture areas are those of predominantly Class I through IV soils as identified by the United States Natural Resources Conservation Service or as identified in more detailed data; and other lands that are suitable for farm use due to soil fertility, suitability for grazing, climatic conditions, existing or future potential for irrigation, land use patterns, or accepted farming practices or are necessary to permit farming practices to be undertaken on adjacent or nearby lands.

Forest

Forest areas are composed of existing and potential forestlands that are suitable for commercial forest uses. Also included are other forested lands needed for watershed protection, wildlife and fish habitat, and recreation, lands where extreme conditions of climate, soil, and topography require maintenance of vegetative cover, and forested lands in urban and agricultural areas which provide urban buffers, wind breaks, wildlife habitat, scenic corridors, and recreational use.

Land Use Maps Section

Map IV-1 displays the unincorporated land within the Portland Metropolitan Urban Growth Boundary. Map IV-2 provides an index for the land use plan maps. Maps IV-3, IV-4, and IV-5 are land use plan maps for areas where the county has adopted land use plan designations by agreement with adjoining cities. As these cities adopt amendments to their maps, the county will consider adoption. County land use plan designations are shown on Maps IV-6 and IV-7. Land use plan maps adopted as part of a Community Plan or Design Plan in Chapter 10 automatically amend Maps IV-6 and IV-7. Map IV-9 displays urban and rural reserves designated pursuant to OAR 660, Division 27, and urban and rural reserves are also illustrated in greater detail on Map IV-7.

URBANIZATION

The goals and policies in the following section address the designation of lands for urban uses, conversion of lands from Urban Reserve to Future Urban plan designations, and County actions regarding Future Urban Study areas and Urban Reserve areas.

GOALS

- Clearly distinguish Urban and Urban Reserve areas from non-urban areas.
- Encourage development in areas where adequate public services and facilities can be provided in an orderly and economic way.
- Insure an adequate supply of land to meet immediate and future urban needs.
- Provide for an orderly and efficient transition to urban land use.
- Distinguish lands immediately available for urban uses from Future Urban areas within Urban Growth Boundaries.

POLICIES

- 1.0 Coordinate with Metro in designating urban areas within Metro's jurisdiction. Recognize the statutory role of Metro in maintenance of and amendments to the Portland Metropolitan Urban Growth Boundary.
- 2.0 Coordinate with affected cities in designating urban areas outside of Metro. Land designated as a Rural Reserve, as shown on Map IV-9, shall not be designated as an Urban Reserve or added to an urban growth boundary. The following areas may be designated as Urban:
 - a. Land needed to accommodate 20 years of future urban population growth.
 - b. Land needed for increased housing, employment opportunities and livability from both a regional and subregional view.
 - c. Land to which public facilities and services can be provided in an orderly and economic way.
 - d. Land which insures efficient utilization of land within existing urban areas.
 - e. Land which is best suited for urban uses based on consideration of the environmental, energy, economic and social consequences.

- f. Agricultural land only after considering retention of agricultural land as defined, with Class I having the highest priority for retention and Class VI the lowest priority.
 - g. Land needed after considering compatibility of proposed urban uses with nearby agriculture activities.
 - h. Land where the strategic location of employment and living opportunities can minimize commuting distance, traffic congestion, pollution and energy needs.
- 3.0 Land use planning for urban areas shall integrate all applicable policies found throughout the Plan including the following:
- a. Locate land uses of higher density or intensity to increase the effectiveness of transportation and other public facility investments.
 - b. Encourage infilling of Immediate Urban Areas with a minimum of disruption of existing neighborhoods (see infill policies in the Housing Chapter).
 - c. Enhance energy conservation and transportation system efficiency by locating opportunities for housing near work and shopping areas.
 - d. Integrate developments combining retailing, office, and medium and high density housing at places with frequent transit service and pedestrian facilities.
- 4.0 Establish Urban Growth Management Areas and Urban Growth Management Agreements to clarify planning responsibilities between the County and cities for areas of mutual interest.
- 5.0 Establish agreements with cities and service districts to clarify service and infrastructure responsibilities for areas of mutual interest.

Immediate Urban Policies

- 6.0 An area may be designated Immediate Urban consistent with the definition. The following policies apply to Immediate Urban areas:
- 6.1 Use the following guidelines when evaluating proposed changes in zoning designations that convert an area from Future Urban to Immediate Urban status:
 - a. Capital improvement programs, sewer and water master plans, and regional public facility plans shall be reviewed to ensure that orderly, economic provision of public facilities and services can be provided.

- b. Sufficient vacant Immediate Urban land should be permitted to ensure choices in the market place.
- 6.2 Apply urban zoning districts that implement the Plan through a legislative or quasi-judicial zone change process consistent with applicable state, Metro and local requirements.
- 6.3 Control land uses in Immediate Urban areas through the Zoning and Development Ordinance.
- 6.4 Place conditions on development to ensure adequate services and facilities prior to or concurrent with development.

Future Urban Policies

7.0 The following policies apply to Future Urban lands:

- 7.1 Control premature development (before services are available) by:
 - a. Applying a future urban zone with a 10 acre minimum lot size within the Portland Metropolitan UGB except those lands identified in Subsection 7.1.b.
 - b. Applying a future urban zone with a 20 acre minimum lot size or greater for areas planned for employment, industrial and commercial uses within the Portland Metropolitan UGB.
 - c. Applying within the urban growth boundaries of Canby, Estacada, Sandy or Molalla, a 5 acre lot size or larger in rural, agricultural or forest zones.
- 7.2 Prohibit subdivisions, as defined in the Zoning and Development Ordinance, until the land qualifies as Immediate Urban.
- 7.3 Review partition requests to ensure that the location of proposed easements and road dedications, structures, wells, and septic drainfields are consistent with the orderly future development of the property at urban densities.
- 7.4 For land within the urban growth boundaries of Canby, Estacada, Sandy or Molalla, require annexation to a city as a requirement for conversion to Immediate Urban unless otherwise agreed to by the City and County.

Future Urban Study Area Policies

8.0 The following policies apply to Future Urban Study Areas:

- 8.1 Conduct a planning process consistent with the policies of Chapter 11 of this Plan, that coordinates with affected service providers, agencies, and jurisdictions, and meets pertinent state, regional and local requirements.
- 8.2 In the Portland Metropolitan Urban Area, develop Comprehensive Plan designations that are consistent with Regional Urban Growth Goals and Objectives and the Regional Urban Growth Management Functional Plan, including Title 11, and the following.

When areas are brought into the Urban Growth Boundary, the following actions shall be undertaken:

- a. Control premature development (before services are available) within the Portland Metropolitan Urban Growth Boundary by applying a 20-acre minimum lot size to lands within the boundary that have the following plan designations: Unincorporated Community Residential, Rural Commercial, Rural Industrial, and Rural.
- b. The County shall enter into discussion with nearby cities, agencies that provide public facilities and services, and area citizens, to determine how services and governance will be provided for the area.
- c. Agreements shall be developed with affected cities and service providers to cooperate in development of a Concept Plan for the area, and to consider the Concept Plan in development of future Plans.
- d. A Concept Plan shall be developed meeting state and regional requirements. Opportunity shall be provided to citizens and affected public agencies to participate in the development of the Concept Plan. In the Damascus area, the Damascus Concept Planning Study Report shall be used to provide background information and guidance for the Concept Planning process.
- e. A request shall be made to revise state and regional transportation plans to reflect the Concept Plan.
- f. Public facilities plans shall be developed or revised to accommodate the Concept Plan.
- g. The Comprehensive Plan, Comprehensive Plan Maps, Zoning and Development Ordinance and zoning maps shall be revised according to the Concept Plan.

- 8.3 Develop and adopt urban comprehensive plan designations that meet applicable state planning requirements and balance County planning goals adopted in the Comprehensive Plan. This will convert Future Urban Study Areas to Future Urban or Immediate Urban areas.
- 8.4 During development of Comprehensive Plan provisions pursuant to Title 11 of the Urban Growth Management Functional Plan, consider the feasibility of providing and funding adequate infrastructure.

Urban Reserve Area Policies

- 9.0 The following policies apply to Urban Reserve areas established pursuant to OAR 660, Division 21:
 - 9.1 Clackamas County shall recommend to Metro land in Clackamas County which should be designated Urban Reserve, when Urban Reserve amendments to the Region 2040 Urban Growth Management Functional Plan are considered by Metro. The cities of Sandy, Molalla, Estacada and Canby, in coordination with Clackamas County, may designate and adopt other urban reserve areas in a manner consistent with OAR 660-021-0000.
 - 9.2 Clackamas County will consider the following characteristics of each area when recommending Urban Reserve areas to Metro: potential for providing jobs within near proximity to housing; the feasibility and cost effectiveness of extending urban infrastructure; the suitability of an area to accommodate urban level densities; and, the relationship and implications to existing areas designated urban.
 - 9.3 When considering the designation of Urban Reserve areas near Sandy, Molalla, Estacada and Canby, the County, in cooperation with the City, shall make findings and conclusions based on the requirements of OAR 660-021-0030.
 - 9.4 Urban Reserve areas designated by Metro will be depicted on Metro's Region 2040 Growth Concept map. Designated Urban Reserve areas near Sandy, Molalla, Estacada and Canby shall be defined within the Urban Growth Management agreements with each city.
 - 9.5 Lands within a designated Urban Reserve area shall continue to be planned and zoned for rural uses in a manner that ensures a range of opportunities for the orderly, economic and efficient provision of urban services when these lands are included in the Urban Growth Boundary. Planning and zoning shall be done in a manner consistent with OAR 660-021-0000 and the Metro Code, in areas where Metro has jurisdiction.

10.0 The following policies apply to Urban Reserve areas established pursuant to OAR 660, Division 27, as shown on Map IV-9:

10.1 The County will review the designation of Urban Reserve areas, in coordination with Metro, Multnomah and Washington Counties, within 20 years after the initial designation of these Urban Reserve Areas.

10.2 The County will participate in the development of concept plans for areas within Urban Reserve areas that are being considered for addition to the Portland Metropolitan Urban Growth Boundary.

10.3 The County shall not amend the Comprehensive Plan or Zoning and Development Ordinance or the Comprehensive Plan Map or zoning designations:

a. To allow within Urban Reserve areas, new uses that were not allowed on the date the Urban Reserve areas were designated, except those uses authorized by amendments to the Oregon Revised Statutes or Oregon Administrative Rules enacted after designation of Urban Reserve areas.

b. To allow within Urban Reserve areas, the creation of new lots or parcels smaller than allowed on the date Urban Reserve areas were designated, except as authorized by amendments to the Oregon Revised Statutes or Oregon Administrative Rules enacted after designation of Urban Reserve areas.

Rural Reserve Area Policies

11.0 The following policies apply to Rural Reserve areas established pursuant to OAR 660, Division 27, as shown on Map IV-9:

11.1 Land established as a Rural Reserve area shall not be included in an urban growth boundary.

11.2 Land established as a Rural Reserve area shall not be included in an Urban Reserve area established pursuant to either OAR 660, Division 21, or OAR 660, Division 27.

11.3 The County shall not amend the Comprehensive Plan or Zoning and Development Ordinance, or the Comprehensive Plan Map or zoning designations:

a. To allow within the Rural Reserve areas, new uses that were not allowed on the date Rural Reserve areas were designated, except as authorized by amendments to the Oregon Revised Statutes or Oregon Administrative Rules enacted after the designation of Rural Reserve

areas.

- b. To allow within Rural Reserve areas, the creation of new lots or parcels smaller than allowed on the date Rural Reserve areas were designated, except as authorized by amendments to the Oregon Revised Statutes or Oregon Administrative Rules enacted after designation of Rural Reserve areas.

Population Coordination

12.0 The following policies apply to population planning and coordination.

12.1 Pursuant to OAR 660-024-0030, counties are required to adopt and maintain a coordinated 20-year population forecast for each urban area within the county and consistent with the applicable statutory requirements of ORS 195.025 to 195.036. The cities within the county are required to adopt a 20-year population forecast for the urban area consistent and with the coordinated with the county's 20-year population forecast, except for those urban areas located within the Metropolitan Service District (Metro) jurisdiction that must also coordinate with Metro's the metropolitan service district's 20-year population forecast.

12.2 The County and its cities located inside the Metro boundary shall coordinate with Metro in establishing 20-year population projections in order to evaluate and provide sufficient lands necessary for housing and employment needs within each jurisdiction's planning boundary.

12.32 The County and its cities located outside the Metro boundary shall coordinate in establishing 20-year population projections in order to evaluate and provide sufficient lands necessary for housing and employment needs within each the individual city's urban growth boundary.

12.4 Clackamas County adopts the following population forecasts, as identified in the "Clackamas County Rural Cities Population Coordination Background Report and Forecasts, Final: March 12, 2013," adopted by Ordinance ZDO-242 and found in Appendix B. These projections have been coordinated with the identified cities.

<u>City</u>	<u>2012 population</u>	<u>2032 population</u>	<u>Net growth 2012-2032</u>	<u>Avg. Annual Growth Rate (AAGR) 2012-2032</u>
<u>Barlow</u>	136	146	10	0.4%
<u>Canby</u>	16,820	26,730	9,910	2.3%
<u>Estacada</u>	2,845	4,345	1,500	2.1%
<u>Molalla</u>	8,532	12,760	4,228	2.0%

Sandy	10,322	17,960	7,628	2.8%
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~~12.3 The County adopts the City of Sandy 20-year population projection identified in the ECONorthwest Report dated July 22, 2008 into the Land Use Section of Appendix B of the Clackamas County Comprehensive Plan. This population projection is adopted in File No. Z0471-08 CP under the Safe Harbor provisions under ORS 195.034 and OAR 660-024-0030.~~

~~12.4 The County adopts the City of Estacada 20-year population projection identified in the City of Estacada's Economic Opportunity Analysis (EOA) dated June 15, 2009 into the Land Use Section of Appendix B of the Clackamas County Comprehensive Plan. This population projection is adopted in File No. ZDO-227 under the Safe Harbor provisions under ORS 195.034 and OAR 660-024-0030.~~

*No additional changes are proposed to Chapter IV.

Ordinance ZDO-242
Comprehensive Plan Amendments

Text to be added is underlined. Text to be deleted is ~~struck through~~.

Appendix B

SUMMARY OF SUPPORTING DOCUMENTS

LAND USE

Comprehensive Plan, Clackamas County, Oregon, Planning Dept., Clackamas County, August, 1974.

Comprehensive Plan, Clackamas County, Oregon, Planning Dept., Clackamas County, June, 1980.

Comprehensive Plan Update, The Sunnyside United Neighbors, June 30, 1988, Revised August 22, 1988.

Comprehensive Plan, Clackamas County, Oregon, Planning Dept., Clackamas County, June 1992.

Let's Build A Revised Comprehensive Plan for Clackamas County, Dept. of Environmental Services, Clackamas County, January, 1979.

Sunrise Center Task Force, Clackamas County, December, 1987.

~~City of Sandy Safe Harbor Population Forecast, EGONorthwest, City of Sandy, July 22, 2008.~~

~~City of Estacada Economic Opportunity Analysis; Cogan Owens Cogan, LLC and Marketek, Inc., June 16, 2009~~

Clackamas County Rural Cities Population Coordination Background Report and Forecasts, Clackamas County, Final: March 12, 2013.

*Changes are proposed only for the LAND USE section of Appendix B.



**Clackamas County
Rural Cities Population Coordination
Background Report and Forecasts**

Final: March 12, 2013

Prepared by: Clackamas County Planning & Zoning Division, in coordination with the cities of Barlow, Canby, Estacada, Molalla and Sandy and with contributions from the Metro data resource center.

This project is funded by Oregon general fund dollars through the Department of Land Conservation and Development. The contents of this document do not necessarily reflect the views of policies of the State of Oregon.

EXECUTIVE SUMMARY

State law requires that forecasts be managed by a “coordinating body” that establishes and maintains a 20-year population forecast for the entire area within its boundary (ORS 195.036). Metro is the coordinating body for the urban areas of Clackamas County, Washington County, and Multnomah County within the Metro boundary. Clackamas County is the coordinating body for the rural area of the County (the area outside the Metro boundary), including the five rural-area cities. To date, the County has not coordinated forecasts for its rural cities.

Clackamas County has five rural cities: Barlow, Canby, Estacada, Molalla and Sandy. Combined, these cities comprise less than 10% of the county’s total population. Several of these cities have been growing very rapidly, however. Between 2000 and 2010, the cities of Canby, Molalla and Sandy captured 25% of the County’s total population growth.

- Canby increased by 3,039 people (8% of County growth).
- Molalla increased by 2,374 people (6% of County growth).
- Sandy increased by 4,065 people (11% of County growth).

Barlow and Estacada posted slower growth over the last decade:

- Barlow has and will continue to have very limited growth due primarily to the fact that there is not sewer service available in the city and the city is largely built-out.
- Estacada posted slow growth over the last decade but recent permit activity and interest by developers indicated this city should experience stronger growth in the future.

As a result of recent trends, Canby, Estacada, Molalla and Sandy have been working hard to position themselves to attract more economic and population growth moving into the future by undertaking such activities as creating urban renewal districts, downtown redevelopment plans and economic marketing strategies, and preparing industrial land to be “shovel-ready” for development. These cities also continue to provide a more affordable housing alternative than in the urban cities (inside the Metro UGB).

Strong growth is expected to continue in these cities (with the exception of Barlow, for reasons noted in the report and in Appendix A). The table below summarizes the 20-year coordinated population projections that have resulted from the collaborative efforts of the county, Metro and the five rural cities. Each of the rural cities was provided several opportunities to review and provide feedback on these forecasts and this report in general.

These projections were completed to be consistent with OAR 660-024-0030 and meet the statutory requirements of ORS 195.025 and ORS 195.036 and will be presented to the Board of County of Commissioners for adoption into Clackamas County’s Comprehensive Plan in March 2013.

City	2012 population	2032 population	<i>Net growth 2012-2032</i>	Avg. Annual Growth Rate (AAGR) 2012-2032
Barlow	136	146	<i>10</i>	0.4%
Canby	16,820	26,730	<i>9,910</i>	2.3%
Estacada	2,845	4,345	<i>1,500</i>	2.1%
Molalla	8,532	12,760	<i>4,228</i>	2.0%
Sandy	10,322	17,960	<i>7,628</i>	2.8%

Source: US Census, Metro, Clackamas County

INTRODUCTION

In January 2012, Clackamas County’s Planning Division received a grant to complete a coordinated population forecast for its rural cities, per ORS 195.036.¹ The goal of the Rural Cities Population Coordination project is to establish coordinated population forecasts for rural unincorporated Clackamas County and its five rural cities: Barlow, Canby, Estacada, Molalla and Sandy. These forecasts will be appropriate for and useful to each city as they continue to plan for urban development within their jurisdictions.

This report summarizes the project; reviews the historic demographic trends and current conditions in Clackamas County and its rural cities; and presents the 20-year forecast for each of the rural cities that are proposed for adoption by the county in March 2013.

Evaluating past demographic trends provides clues about what the forecast will look like and helps determine the realm of likely possibilities. Past trends explain the dynamics of population growth particular to local areas. Relating recent and historical population change to events that influenced the change serves as a gauge for what might realistically occur in a given area over the long term.

The forecasts in this report draw on household and employment forecasts developed by the Metropolitan Service District, Metro, but focuses on the unincorporated areas and jurisdictions beyond the Metro boundary, the rural area of Clackamas County. It utilizes the “control total” forecasts developed by Metro as well as allocations to the rural areas of the county and attempts to show how the final forecasts resulting from this process are reasonable in light of historic growth trends in the cities and commensurate with analyses completed by individual cities.

This report is organized into the following sections:

Background Report	Section I:	Background and Context (Clackamas County setting; data sources and methodology; population growth assumptions)
	Section II:	Demographic Trends (General overview of State and Clackamas County; characteristics of the rural area cities including historic population growth, current conditions, building permits, etc.)
Forecast	Section III:	Methodology and Factors Affecting Population Growth (regional and local)
	Section IV:	Forecasts (State and Metro forecasts; countywide; inside & outside Metro boundary; draft cities’ forecasts)
Appendices	Appendix A:	Information considered in assessment of city forecasts
	Appendix B:	Documentation of coordination with rural cities
	Appendix C:	Summary of Metro forecasting methodology
	Appendix D:	Maps of TAZ groups and city boundaries
	Appendix E:	Supporting data and additional demographic tables
	Appendix F:	Excerpts from Statewide Economic & Demographic Reports

¹ The urban cities in Clackamas County are part of Metro (the Metropolitan Service District), which is responsible for coordinating population forecasts within its boundary.

BACKGROUND REPORT

SECTION I: BACKGROUND AND CONTEXT

Background of Population Forecasts

Local governments in Oregon have developed and adopted population forecasts for planning purposes since the inception of the statewide planning program in the late 1970's. The forecasts are used to determine the size of Urban Growth Boundaries (UGBs), guide capital improvement planning, and meet other planning requirements. For example, State laws require cities with populations greater than 25,000 to plan for sufficient buildable lands inside their urban growth boundaries for housing needed to accommodate population growth (ORS 197.295 – 197.296) and for industrial and commercial development to support economic growth (ORS 197.712).

To achieve consistency through the forecasting process and results, the Oregon legislature designated the state Office of Economic Analysis (OEA), a division of the Department of Administrative Services, as the primary forecasting agency for the state. The OEA prepares population and employment forecasts for the state and each county. The most recently adopted OEA forecast was completed in 2004 but a draft of the current (2012) forecast was released for review in late 2012.

State law requires that forecasts be managed by a “coordinating body” that establishes and maintains a 20-year population forecast for the entire area within its boundary (ORS 195.036). Metro is the coordinating body for the urban areas of Clackamas County, Washington County, and Multnomah County within the Metro boundary. Clackamas County is the coordinating body for the rural area of the County (the area outside the Metro boundary), including the five rural-area cities. To date, the County has not coordinated forecasts for its rural cities. Because Metro is currently coordinating regional households forecasts that include planning areas beyond the Metro boundary in its model, Clackamas County has the opportunity to use forecasts developed by this agency as a basis for its rural cities’ population coordination.

Data Sources

Information in this population report is based on data obtained from a number of sources, including:

- **Metro**

As the metropolitan region’s planning agency, Metro (<http://www.oregonmetro.gov/>) provides the technical analysis to produce population and employment forecasts for the Portland-Vancouver metropolitan region, including Multnomah County, Washington County, Clackamas County in Oregon and Clark County in Washington. The agency manages “an integrated land use and transportation model” called Metroscope. These data also are integral to a regional economic/population model and the “travel demand model.”

Metroscope comprises the databases to forecast changes in population, household and employment, and these forecasts “result in an equilibrium growth allocation which balances residential or employment capacity against regional population or employment growth trends.”

Data from the Metroscope and many of the assumptions going into Metroscope were provided to the local jurisdictions (cities and counties) for review prior to the completion of the 2025 and 2035 forecasts.

- **Oregon Office of Economic Analysis (OEA)**

OEA (<http://www.oea.das.state.or.us/DAS/OEA/demographic.shtml>) provides long-term population forecasts and historic population trends on a county-wide level. These data were used to compare with Metro forecasts.

- **Rural cities**

The cities in Clackamas County's rural area provided data from past population studies and projections (completed by individual cities), with estimates of buildable lands and capacity for various land uses. The cities were also asked to provide information about current conditions and any known future conditions or changes that could positively or negatively affect population growth into the future (see Appendix A).

- **Portland State University, Population Research Center (PRC)**

Annual population estimates for cities and counties of Oregon are prepared by the Population Research Center at Portland State University (<http://pdx.edu/prc/>) as part of its Population Estimates Program. Data on State income tax returns, births, deaths, Medicare, school enrollment, and city annexations, and information about changes in housing stock and group quarters population are utilized in developing the population estimates. Population estimates for Clackamas County, its cities and its unincorporated area from 2000 to 2011 are used in this study to help to understand growth trends throughout the county.

- **US Census**

The decennial census (<http://www.census.gov/>) is the only source of data collected for small areas across the nation. The 2000 Census and 2010 Census data were used to obtain the population by age and sex, of those residing in the County's cities and unincorporated areas. Historic data from past decennial census was used to look at longer term growth trends.

Clackamas County Setting

Clackamas County, Oregon is located within the northwest tier of the state and is the third-most populated population county in the state with 375,922 residents after Multnomah County (735,334 residents) and Washington County (529,710 residents).² The County land area is approximately 1,880 square miles, about half of which is in National forest lands located in the eastern and southern reaches of the county.

Regional land use and transportation planning for the urban areas of these three counties is overseen and managed by the Metropolitan Service District, Metro. The Metro Board and elected officials of participating jurisdictions set policy direction for long range planning, coordinate population forecasts for the region, and agree on a range of services for the urban area. Metro also maintains the "Metro Boundary" and the metro area's Urban Growth Boundary (UGB) which delineate the lands for urban development from rural areas.

Clackamas County's densely populated urban area is focused in the northwest quadrant of the county; the urban area, with about 72% of the county's population, has nine cities, portions of three cities shared with other counties, and a sizeable population in unincorporated communities. The rural area supports five cities, unincorporated resort communities near Mt. Hood, and a rural population involved in farming and forestry.

² 2010 US Census

Table 1 lists the populations of the cities and unincorporated areas in Clackamas County by location either inside the Metro UGB (urban area) or outside the Metro UGB (rural area). As noted earlier, the area outside the Metro UGB (rural area) will be the focus of this report.

Table 1. 2010 Population for Clackamas County Cities and Unincorporated Areas

	2010 Population*	Percent of Total Population
RURAL AREA		
Barlow	135	0.04%
Canby	15,830	4.20%
Estacada	2,730	0.72%
Molalla	8,110	2.15%
Sandy	9,655	2.56%
Total Rural Cities	36,460	9.68%
Rural Unincorporated Area**	68,345	18.14%
Total Rural Area Population	104,805	27.82%
URBAN AREA		
Damascus	10,540	2.80%
Gladstone	11,495	3.05%
Happy Valley	14,100	3.74%
Johnson City	565	0.15%
Lake Oswego	34,067	9.04%
Milwaukie	20,290	5.39%
Oregon City	31,995	8.49%
West Linn	25,150	6.67%
Wilsonville	17,385	4.61%
Rivergrove***	258	0.07%
Portland***	744	0.20%
Tualatin***	2,869	0.76%
Total Urban Cities	169,458	44.98%
Urban Unincorporated Area**	102,517	27.21%
Total Urban Area Population	271,975	72.18%
Total County Population	376,780	

* July 1, 2010 revised Estimates, prepared by Population Research Center, PSU, March 2012. Numbers may differ slightly from 2010 Census numbers due to methodology and estimate dates (US Census reports April 1, 2010).

** Estimated population of unincorporated areas based on Census data (CCD and Census Tract) and from Metro's allocation of households to Transportation Analysis Zones (TAZ).

*** Includes only the portions of these cities that are within Clackamas County.

SECTION II: HISTORIC DEMOGRAPHIC TRENDS

Historic Population Growth

Table 2 (next page) shows the population of the State of Oregon, Clackamas County and the county's rural cities for the decades from 1960 to 2010. During this 50-year period, the nation's population increased by 72%, the State of Oregon's population increased by 117% and Clackamas County's population by 233%.

Population changes by decade largely reflect the expansion and contraction of the US economy during those fifty years. Oregon's population increase in the 1960's and 1970's outpaced that of the nation growing by 18% and 26% respectively, compared to 13% and 11% for the nation. Clackamas County itself experienced significant increases, posting a 47% increase in the 1960's and 46% increase in the 1970's.

The recession of the 1980's slowed Oregon's growth to 8%, lagging behind the 10% growth in the United States; although Clackamas County's growth managed a higher rate of 15%. During the 1990's, the population of Oregon and Clackamas County increased at higher rates (20% and 21% respectively) than the nation's. From 2000 to 2010, the rates of population increase for Oregon and Clackamas County (12% and 11% respectively) were again higher than the rate for the nation, but this decade's growth was significantly less than that experienced during the boom years of the 1990's.

A recent report from the state Office of Economic Analysis³ provides a perspective of how the economy affects the state's population, in particular how changes in the economy affect migration. The protracted recession starting in about 2007 has greatly decreased the share that migration plays in population change:

Oregon's economic condition heavily influences the state's population growth. Its economy determines the ability to retain local work force as well as attract job seekers from national and international labor market. As Oregon's total fertility rate remains below the replacement level and deaths continue to rise due to ageing population, long-term growth comes mainly from net in-migration. Working-age adults come to Oregon as long as we have favorable economic and employment environments. During the 1980s, which included a major recession and a net loss of population, net migration contributed to 22 percent of the population change. On the other extreme, net migration accounted for 73 percent of the population change during the booming economy of 1990s. This share of migration to population change declined to 56 percent in 2002 and it was further down to 32 percent in 2010. (p. 9)

³ Oregon Economic and Revenue Forecast" June 2012. Volume XXXII, No. 1. Release Date: May 22, 2012 (See Appendix F)

Table 2. Population Change by Decade, 1960 to 2010. State of Oregon, Clackamas County and Rural Cities

	1960	1970 10-yr change % Change			1980 10-yr change % Change			1990 10-yr change % Change			2000 10-yr change % Change			2010 10-yr change % Change		
OREGON	1,768,687	2,091,533	322,846	18%	2,633,105	541,572	26%	2,842,337	209,232	8%	3,421,437	579,100	20%	3,831,074	409,637	12%
		Avg Annual Rate:		1.69%		Avg Annual Rate:		2.33%		Avg Annual Rate:		0.77%		Avg Annual Rate:		1.87%
Clackamas County																
	113,038	166,088	53,050	47%	241,919	75,831	46%	278,850	36,931	15%	338,387	59,537	21%	375,992	37,605	11%
		Avg Annual Rate:		3.92%		Avg Annual Rate:		3.83%		Avg Annual Rate:		1.43%		Avg Annual Rate:		1.95%
Barlow																
	85	105	20	24%	105	-	0%	115	10	10%	140	25	22%	135	(5)	-4%
		Avg Annual Rate:		2.14%		Avg Annual Rate:		0.00%		Avg Annual Rate:		0.91%		Avg Annual Rate:		1.99%
Canby																
	2,178	3,813	1,635	75%	7,659	3,846	101%	9,115	1,456	19%	12,790	3,675	40%	15,829	3,039	24%
		Avg Annual Rate:		5.76%		Avg Annual Rate:		7.22%		Avg Annual Rate:		1.76%		Avg Annual Rate:		3.45%
Estacada																
	957	1,164	207	22%	1,419	255	22%	1,983	564	40%	2,475	492	25%	2,695	220	9%
		Avg Annual Rate:		1.98%		Avg Annual Rate:		2.00%		Avg Annual Rate:		3.40%		Avg Annual Rate:		2.24%
Molalla																
	1,501	2,005	504	34%	2,992	987	49%	3,683	691	23%	5,734	2,051	56%	8,108	2,374	41%
		Avg Annual Rate:		2.94%		Avg Annual Rate:		4.08%		Avg Annual Rate:		2.10%		Avg Annual Rate:		4.53%
Sandy																
	1,147	1,554	407	35%	2,862	1,308	84%	4,210	1,348	47%	5,505	1,295	31%	9,570	4,065	74%
		Avg Annual Rate:		3.08%		Avg Annual Rate:		6.30%		Avg Annual Rate:		3.93%		Avg Annual Rate:		2.72%

Source: US Census

Rural Area Population Changes (2000 to 2010)

Table 3 focuses on the 2000 to 2010 demographic trends of Clackamas County’s rural area, covering the five cities and unincorporated communities. The table shows the population growth and percentage of change for the last decade.

Table 3. Population Changes, 2000-2010. Clackamas County Rural Cities

Jurisdiction	Year 2000	% of County 2000	Population Change 2000 to 2010			Year 2010	% of County 2010
			Amount	Percent	AAGR		
Oregon	3,421,437		409,637	12%	1.14%	3,831,074	
Clackamas County	338,387		37,605	11%	1.06%	375,992	
Barlow	140	0.04%	-5	-3.6%	-0.36%	135	0.04%
Canby	12,790	3.78%	3,039	23.8%	2.15%	15,829	4.21%
Estacada	2,371	0.70%	324	13.7%	1.29%	2,695	0.72%
Molalla	5,734	1.69%	2,374	41.4%	3.53%	8,108	2.16%
Sandy	5,505	1.63%	4,065	73.8%	5.69%	9,570	2.55%
Rural Uninc.*	65,185	19.26%	3,051	4.7%	0.46%	68,236	18.15%
Total Rural Area	91,725	27.11%	12,848	14.0%	1.32%	104,573	27.81%

* The rural unincorporated population for 2000 was estimated as 40% of the County’s total unincorporated population. The 40% figure was Metro’s allocation to rural unincorporated areas in 2010 and accounted for the incorporation of Damascus in 2004. Source: US Census

At 375,992, the 2010 population of Clackamas County was 11.1% higher than the 2000 population. The County’s average annual growth rate in this decade was 1.06%, slightly lower than the State’s rate of 1.14%. Even with this lower rate, Clackamas County retained close to 10% of the State population between 2000 and 2010 (9.9% and 9.8% respectively), although the county’s population as a percentage of the Portland-Vancouver-Hillsboro MSA population decreased slightly between 2000 and 2010 (17.55% in 2000 and 16.89% in 2010).

Because of the small population base for the rural cities, the percent of population change over the 2000 to 2010 time period is higher than the population change for the county as a whole. Still, the cities of Canby, Molalla and Sandy all increased their share of the total population in the county, meaning that these cities are growing faster than the county in real terms. The portion in Estacada dropped slightly during this period.

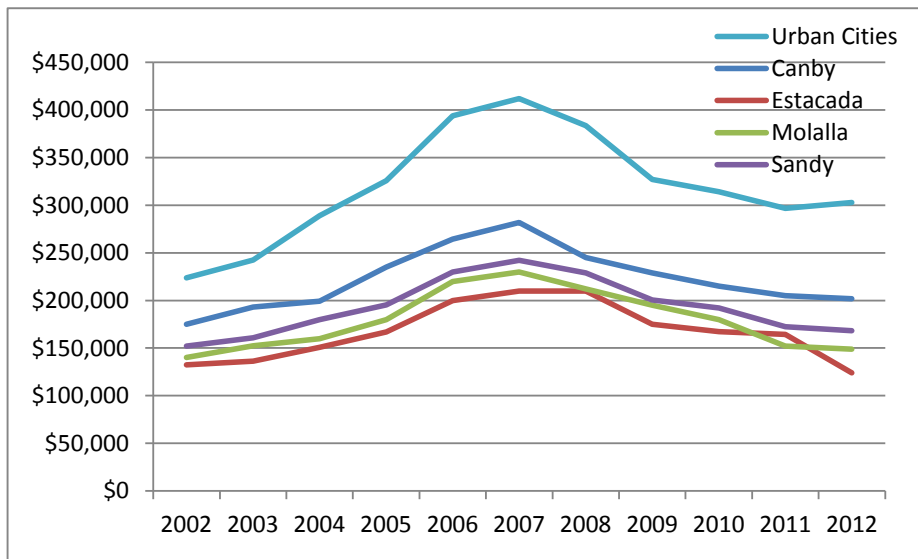
- The total population of the five rural cities was 7.9% of County population in 2000, and their population increased to 9.7% of the County’s 2010 population.
- The cities of Canby, Molalla and Sandy captured 25% of the County’s total population growth (37,605 persons) between 2000 and 2010.
 - The City of Canby increased population by 3,039 (8% of County growth), the City of Molalla by 2,374 (6% of County growth) and the City of Sandy by 4,065 (11% of County growth).
 - The population of these three cities increased from 7.1% of the County’s population in 2000 to 8.9% of the County’s population in 2010.

Population increases due to annexations to the cities were low and were not a contributing factor to the high growth rates. From March 2002 through March 2012, Estacada gained 50 residents, Canby 41 residents and Molalla 3 residents through annexation.⁴

A more likely contributing factor in this high growth is the fact that the five rural cities have consistently provided less expensive housing than in the Metro area, particularly during the housing boom years when home prices were appreciating at unprecedented rates.

As shown in Figure 1, median home sales prices in the five rural cities were substantially lower than those of the county’s urban area cities from 2002 to 2012 (see Appendix E for details).

**Figure 1. Median Home Sales Price 2002-2012.
Clackamas County’s Urban and Rural Cities**



Note: For context only, some sales not verified
Source: Clackamas County Tax Assessor

The population for the rural unincorporated area is an estimate drawn from several sources, including Metro’s 2010 household allocation, population figures from OEA (“Population for Oregon’s Counties and Incorporated Places, 1990-2010” which included the population of the unincorporated area), and population by 2010 Census tracts. The low average annual increase in population, 0.46%, in the unincorporated areas reflects several factors, including land use regulations which restrict residential development on lands zoned for farm and forest uses, as well as the downturn in the economy during this decade.

⁴ Per Population Research Center at Portland State University

Building Permits

Annual building permit activity for the rural area cities provides a good illustration of the effects of the housing boom in the early 2000s and the economic downturn 2008.

**Table 4. Single Family Building Permits, 2000 to 2011
Clackamas County Rural Area Cities**

Year	Canby	Estacada	Molalla	Sandy	TOTAL by Year
2000	96	0	43	150	289
2001	132	5	40	176	353
2002	143	2	42	162	349
2003	97	2	70	123	292
2004	110	9	148	93	360
2005	121	12	99	162	394
2006	197	7	82	193	479
2007	79	46	55	149	329
2008	15	13	27	77	132
2009	4	5	16	46	71
2010	4	47	15	45	111
2011	7	17	14	32	70
TOTAL by City	1,005	165	651	1,408	3,229

Source: US Census

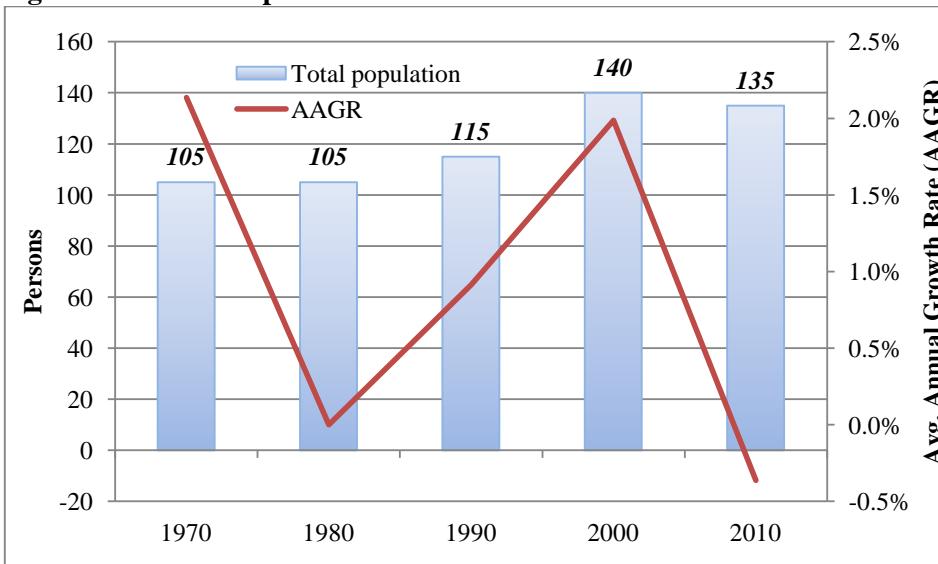
The cities of Canby, Molalla and Sandy had strong years from 2000 through 2007, and Estacada had its largest number of permits issued in 2007. Combined, the cities averaged 355 single family building permits each year during this period. With the downturn in the economy in 2007, the number of building permits dropped; combined, the cities averaged only 96 single family permits each year for 2008 through 2011.

Characteristics of the Rural Cities

Barlow

Barlow is a small city with approximately 135 residents, located about 25 miles south of Portland, just south of the City of Canby. According to the US Census the entire city encompasses approximately 0.1 square miles of land. Barlow is a stable community, growing by only 30 to 35 residents since 1970. The last decade (2000 to 2010) posted a slight loss in population, from 140 to 135. The median age of residents in Barlow was similar to that of the County (38.1 years versus 40.6 years old countywide) but households were larger, with an average of 3.07 persons per households versus 2.56 countywide.

Figure 2. Historic Population Growth - Barlow



Source: US Census, Clackamas County

Growth in Barlow has been and will continue to be greatly limited due to the fact that the city has no sewer system – all the properties have septic systems for sewage disposal. Because of the space needed to fit a home and septic system, it is generally not feasible to develop “urban” sized lots without a sewer system.

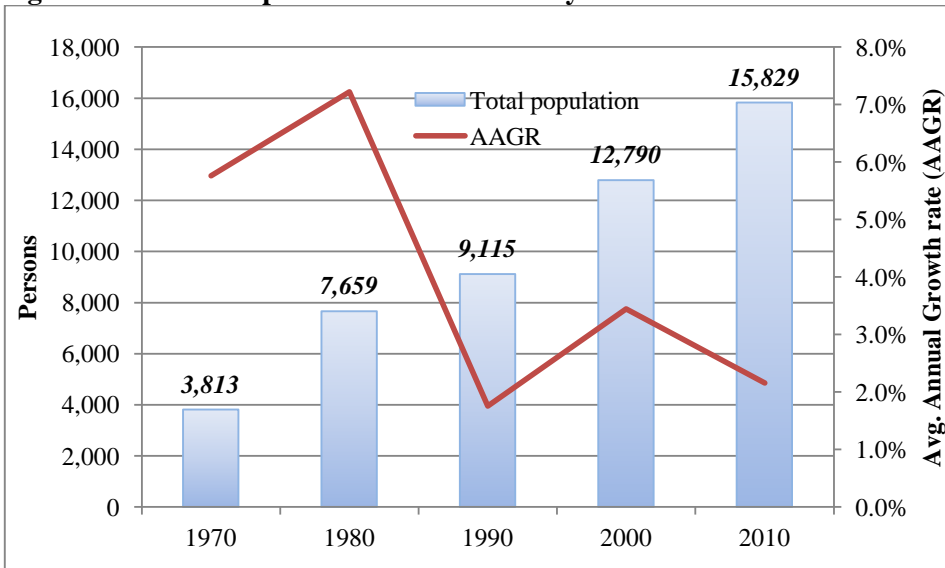
Canby

Canby is a rapidly growing community of approximately 15,830 residents, located 25 miles south of Portland and 30 miles north of Salem. With State Highway 99E running through town, it offers businesses excellent highway access, ample utilities, and a plentiful supply of shovel-ready land. Canby offers residents urban development within close proximity to highly valued farmland, orchards and a thriving nursery industry.

Canby has consistently been one of the fastest growing rural cities in Clackamas County. Population growth averaged 4.0% over the last 50 years and 2.8% annually over the last 20 years. Despite the drop in the growth rate, the actual increase in population has remained fairly consistent over that time period and even *increased* over the last 20 years. From 1970 to 2010, the city’s population grew at an average of 273 persons per year. Over the last two decades (1990-2010) actual population growth averaged slightly higher, at 336 persons per year.

Residential development last decade peaked in 2006, with an average of 128 new residential building permits issued each year. The city saw a steep decline in residential building permits after 2006, with 79 permits issued in 2007 and an average of only 8 permits issued annually from 2008 to 2011.

Figure 3. Historic Population Growth - Canby



Source: US Census, Clackamas County

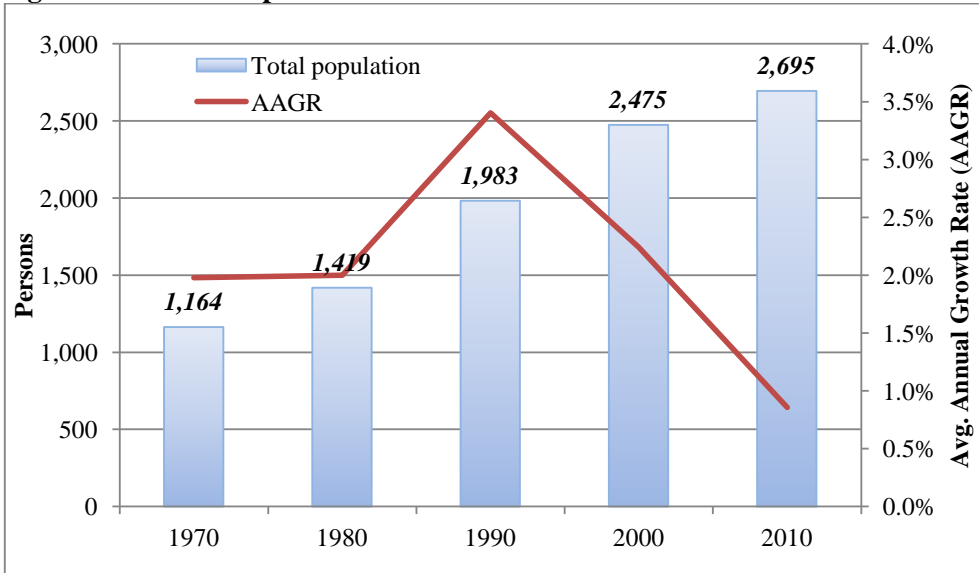
Canby’s households are generally younger and larger households than those county-wide, with an average age of 35.7 years versus 40.6 years old countywide and an average household size 2.78 persons, versus 2.56 countywide.

Estacada

Estacada is a rural community of approximately 2,600 residents situated about 30 miles southeast of Portland and is known as the “gateway to the Clackamas River.” Historically, the primary base for Estacada’s economy has been lumber. As the timber industry declined in the recent past, the economy of the city became depressed; however, in recent years an arts community has been emerging and a limited amount of new industrial development and businesses have also been locating in the city. In 2009, Estacada’s UGB was expanded by 130 acres to accommodate more industrial growth in the northwest corner of the city, along Highway 224.

Population growth has been moderate in Estacada, averaging only 2.1% over the last 50 years. In the last 20 years growth has dropped to an average of 1.5% annually, representing an increase of approximately 36 persons per year. Similarly, new residential growth has been slow, even through the housing boom. Based on building permit data, residential development peaked in 2007 and 2010, with 46 and 47 residential permits issues those years, respectively. The rest of the 2000’s decade saw an average of only 7 building permits issued per year. Interestingly, most of the residential permits issued in the last decade have been post-2008, an indication that perhaps population growth may see a recovery over the slow rates posted in the past two decades.

Figure 4. Historic Population Growth - Estacada



Source: US Census, Clackamas County

Population in Estacada is also comprised of younger households – the average age in 2010 was 35.7 years, versus 40.6 years countywide. Average household size is the same as the county (2.56 persons per household).

Molalla

Molalla is a rural community of approximately 8,100 residents located about 30 miles southeast of Portland. Like Estacada, Molalla’s economy was hurt by the decline in the timber industry, which remained the mainstay of the community’s economy until the 1980s. In recent years, the city has been making efforts to diversify its economic base with new manufacturing and commercial investments and creating an Enterprise Zone to encourage more economic development.

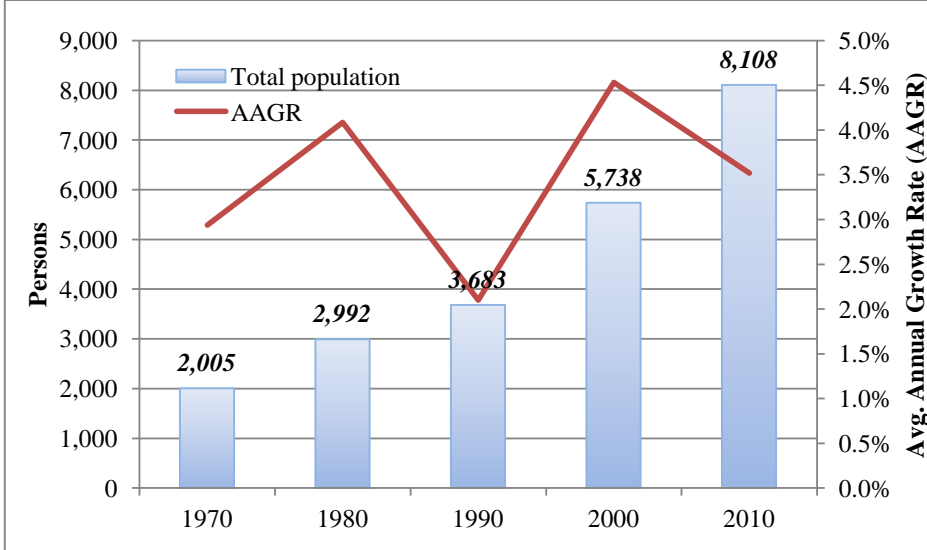
Tourism is playing an increasing role in the city’s economy as well. Molalla is the gateway to the Molalla River Recreation Corridor, attracting thousands of visitors year-round for sightseeing, fishing, hunting, kayaking, rafting, swimming, picnicking, camping, hiking, mountain biking and horseback riding.

Despite recent economic difficulties, Molalla remains an attractive location to reside, near these recreational activities, and it has largely become a bedroom community to the Portland area.

Population growth has been strong in Molalla, averaging 4.0% annually over the last 20 years, slightly higher than the 50 year average of 3.4% annual growth. The population increased steadily from 1970 to 2000, averaging approximately 70 persons per year. Population increases jumped from 1990-2010, averaging around 200 persons per year. Based on building permit data (Table 4), this jump in population growth may be largely due to the housing boom from 2000 to 2007, with an average of 72 new permits issued each year. In the latter part of the last decade, building activity declined dramatically, with an average of only 18 new permits issued annually from 2008 to 2010.

Molalla also has a low supply of developable residential land, however, which could be exacerbating this slowdown. Based on a buildable lands inventory (BLI) completed in 2007-2008 only 71 acres of buildable residential land remains in the city's UGB.⁵

Figure 5. Historic Population Growth - Molalla



Source: US Census, Clackamas County

On average, households in Molalla are much younger (31.4 year old versus 40.6 years old) and slightly larger than those in the region (2.82 persons per household versus 2.56).

Sandy

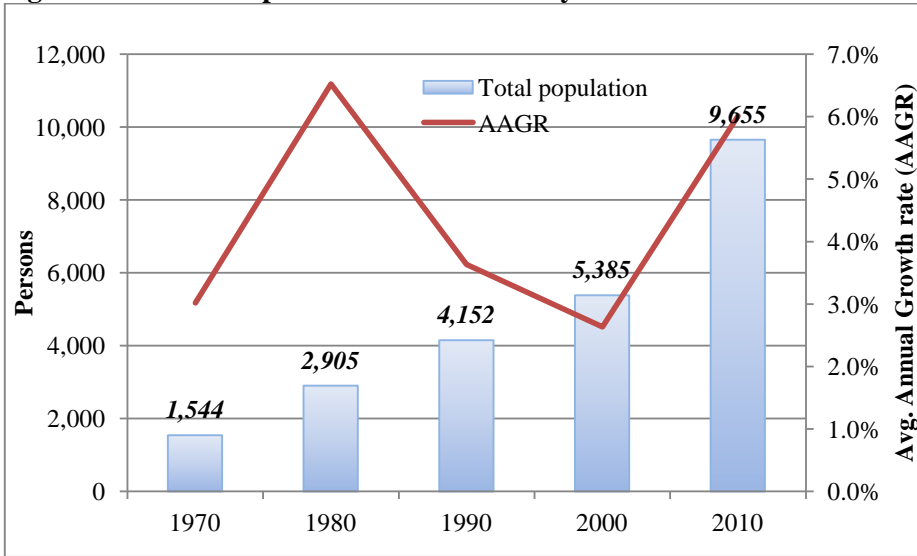
The City of Sandy has a population of approximately 9,570 and is located east of Portland in the Mt. Hood corridor, approximately 35 minutes to Portland International Airport and 45 minutes to downtown Portland. Sandy has developed a small but diverse business base, including many stores and services for visitors to the Mt. Hood Recreation Area. Sandy is an attractive location to reside because it offers good access to outdoor recreation as well as to the more urban amenities in the metro area while offering relatively inexpensive land for development.

Sandy has consistently been one of the fastest growing rural cities in Clackamas County. Population growth averaged 4.4% annually over the last 70 years and 4.3% annually over the last 20 years.

Population increased steadily, averaging approximately 128 persons per year from 1970 to 2000. Population increase spiked from 2000-2010, averaging over 400 persons per year. Based on building permit data (Table 4), some of this jump in population growth can be attributed to the housing boom from 2000 to 2007, with an average of 151 new permits issued each year. In recent years, building activity has declined dramatically, with an average of only 41 new permits issued annually since 2008. Even so, 41 new households/homes per year would still result in population growth roughly equivalent to the historic growth; the fact that this is occurring in a recession could indicate the city is poised to resume rapid growth as the housing recovery continues to take hold.

⁵ The findings of this inventory have not been verified by county staff; the actual acreage may be different.

Figure 6. Historic Population Growth - Sandy



Source: US Census, Clackamas County

Rural Unincorporated Clackamas County

The remaining portion of rural Clackamas County consists of unincorporated rural communities and other large unincorporated areas with rural residential zoning (large lots) and natural resource land (farm and forest lands). Development in rural Clackamas County is limited because of the large amount of natural resource lands, on which new homes are allowed only under certain situations. Still, residential development in the unincorporated area is possible under a few processes that require approval either by the State or by Clackamas County.

Under State Ballot Measure 49 (“Measure 49”) residential development of 3 to 10 houses may be approved by the State Department of Land Conservation and Development (DLCD) for private property owners in some rural areas that may otherwise have been restricted because of the underlying farm or forest zoning. DLCDC notes in its description of the process that “If claim property is currently zoned for resource use (farm, forest or mixed farm/forest), Measure 49 places some limits on how the proposed development must be located to protect and preserve that resource use.” Other development restrictions apply to prime farmland and water restricted areas under this measure.

In total, 1,145 new dwellings will be allowed in Clackamas County’s rural unincorporated area based on Measure 49 claims alone.

Other situations require approval by Clackamas County, including the following: building in the limited areas zoned Rural Residential; building in the areas zoned for resort communities (associated with the recreational and tourist centers near Mt. Hood); having a residence approved as a “non-farm” dwelling on a pre-existing small lot; or having a residence approved as part of a farm management plan.

As noted in Table 3, the rural unincorporated area of Clackamas County grew very slowly over the last decade. According to the county’s best estimate, this area grew at a rate of 0.46% annually from 2000 to 2010, gaining only approximately 3,050 persons. It is expected that the urban areas (both inside and outside the Portland Metro UGB) have and will continue to capture the majority of the new growth in the county simply because they have a greater amount of land available for development.

SUMMARY

Clackamas County's rural cities offer a small snapshot of the great diversity among the different areas of the county. Each has its own unique circumstances and its own attractors for potential new residents and for potentially retaining the young families that seem to be attracted to these communities. Over the last several decades several of these cities have been very successful at attracting people to live outside the Portland metro area. Some of this success has been due to offering less expensive housing than in the metro area while offering relatively easy access both to the metro area and to recreational amenities in the rural area. The cities are all continuing to plan for and to capture new growth of both households and employment.

The information described in the above background report and found in Appendices A and E, were all taken into consideration when assessing future population forecasts.

FORECASTS

SECTION III: METHODOLOGY AND FACTORS AFFECTING POPULATION GROWTH

Regional Trends

The State's current presentation of the economic forecast⁶ provides a summary of current conditions and outlook for the state. The assessment is that the State has been coming out of the recession of the mid 2007-2010 period, but that the pace of improvement "remains slower than what we have become accustomed to in past economic recoveries, and has not been shared across all communities." (p. 6)

The outlook is that Oregon will not recover all of the jobs it has lost until the end of 2014 (p.6), and even with that cautious prediction, the assessment is that "ongoing production slowdown among some of Oregon's largest trading partners in Asia" is a downside risk to the recovery (p.7).

As a sign of slow to modest economic gain, the ratio of net migration-to-population change will increase gradually and is expected to reach 70 percent by the end of this report's forecast horizon [2010 to 2020]. Although the economy and employment situation in Oregon look stagnant at this time, the migration situation is not expected to replicate the early 1980s pattern of negative net migration. Potential Oregon out-migrants have no better place to go since other states are also in the same boat in terms of economy and employment. (p.8)

Age structure and its change affect employment, state revenue, and expenditure. Demographics are the major budget drivers, which are modified by policy choices on service delivery. Growth in many age groups will show the effects of the baby-boom and their echo generations during the period of 2010-2020. It will also reflect demographics impacted by the depression era birth cohort combined with diminished migration of the working age population and elderly retirees. (p.8-9)

Overall, the elderly population over age 65 will increase rapidly whereas population groups under age 65 will experience slower growth in the coming decade. (p.9)

See Appendix F for more excerpts from of the Economic and Revenue Forecast.

Local Trends

Clackamas County and its rural cities are affected by national, statewide and regional trends but also have their own unique set of circumstances. As discussed in the Background Report, several of these cities are suffering from a loss of economic base (Estacada and Molalla) due to the decline in the timber industry which had historically driven these city's economies. These cities, along with Sandy and Canby appear to be committed to attempts at figuring out how to generate greater economic development and diversity, from taking advantage of their locations to attract visitor dollars and tourist businesses to expanding their industrial areas to attract a larger base of employers, to encouraging retail establishments to locate in their jurisdictions to quell the leakage of dollars out of the cities because of lack of choice for consumers. To the extent these cities' are successful in these endeavors, greater population growth or sustained high population growth (depending on the city) could easily occur.

⁶ **Oregon Economic and Revenue Forecast June 2012. Volume XXXII, No. 1. Release Date: May 22, 2012**
Prepared by: Office of Economic Analysis, DAS (See Appendix F)

As noted in the Background Report, several of the county's rural cities have experienced rapid population growth over the last one to two decades. Some of this growth has been driven by the substantial discount housing prices offered in these areas when compared to the county's urban area cities. With the steep decline in housing prices over the last four-five years, housing has become more attainable in the metro urban area and not as many households may be making the decision to move farther out to the rural cities. The extent and speed at which the housing prices recover will also have a sizeable effect on the rural city growth in the future.

Methodology

As noted previously, Metro is completing household and employment forecasts for the region, including both the urban and rural areas of Clackamas County. In general, regional population and household growth is projected as components of population by birth, death and migration. For employment, an employment-population ratio is the approach used to create the alternative growth paths from the base case assumptions. More specific details about Metro forecasting, models and assumptions can be found in Appendix C.

Metro and the participating jurisdictions have reviewed and refined the forecasts for more than a year and Metro adopted the 2025 and 2035 forecasts for the region in November 2012. Within these forecasts are "control totals" for the basic sub-areas in the region. The "control totals" pertinent to this project are those for the urban/rural split within the county, namely a control total for the area within the Metro boundary and a control total for each county area outside the Metro boundary. For carrying out this population coordination project, the "control total" for households and employment was held constant for the Clackamas County area outside the Metro boundary. Within that control total, forecasts for some of the individual cities were adjusted during this review, as warranted, to best represent the specific plans that have been completed for the cities and where growth in rural areas is most likely to be able to locate.

Geographic Differences in Data

The household and employment data sets described above are integral to Metro's "travel demand model," which displays the region divided into 2,162 Transportation Analysis Zones (TAZ). Each TAZ has allocations of the current and forecasted households and employment figures.

For the rural area of Clackamas County (its area outside the Metro boundary), there are 88 TAZ sub-areas that distribute the future population and employment into the rural cities and the rural, unincorporated area. Overall, the boundaries of the several TAZ units that contain a rural city cover a larger area than the city boundaries alone. Each rural city will include a "TAZ group", or a number of TAZ's that include both land inside a city's UGB and some rural land outside the city's UGB. Maps showing TAZ boundaries with respect to the county's five rural cities are found in Appendix D.

Metro's projections were first grouped into these "TAZ groups" for each city then an assumption was made about how much of the projected growth will occur within the city's UGB. Because of the land use restrictions that limit new residential development, described in the Background Report, it is reasonable to expect that the vast majority of the new growth within the "TAZ groups" will actually happen within the cities. This analysis assumed that 90% of the projected household growth in each "TAZ group" will occur within that group's rural city UGB. All of the cities that participated in this project felt this assumption was reasonable.

Once the “TAZ group” forecast was allocated down to the UGB level, it was compared with historic growth in cities, projections previously done for the cities, and other information provided by the cities to assess the reasonableness of the forecast. The next step in the analysis was to look at projected growth in TAZs in the immediate vicinity of each city’s TAZ group along with zoning in that area to assess whether the growth projected for these areas was more likely to occur in the nearby city because of restrictive rural zoning in the TAZ. These pieces of information were the basis for determining if adjustments needed to be made to the forecast for each city. All the proposed forecasts and adjustments were reviewed by the individual cities’ representatives.

ORS 195.036 requires the coordinated population forecast be a 20-year forecast so the last step in the process is to extrapolate the 2012 to 2032 population forecast from the agreed-upon 2035 forecast. This was done simply by assuming an even distribution of growth from 2010 to 2035 (the timeframe of the Metro forecast).

Small Area Forecasts

When assessing forecasts, and particularly forecasts for small areas, it is important to keep in mind that there is uncertainty involved, the degree of which increases the smaller the area. In general, forecasts have a degree of uncertainty simply because all forecasting requires making *assumptions* about the future. Small area forecasts are even less certain because:

- Small areas start from a small base. A small change in the absolute number of population or housing in a small city produces a large percentage change. For example, a new subdivision of 200 homes inside the Portland Urban Growth Boundary has an effect on total population of 0.02%. That same subdivision in Molalla would increase the community’s housing stock by nearly 7%—and population by a similar percentage.
- Especially for small cities in areas that can have high growth potential (e.g., because they are near to concentrations of demand in neighboring metropolitan areas, or because they have high amenity value for recreation or retirement), there is ample evidence of very high growth rates in the short-term; there are also a few cases of high growth rates sustained over 10 to 30 years. However, growth rates for small cities tend to decrease over time because the population base increases.
- Public policy makes a difference. Cities can affect the rate of growth through infrastructure, land supply, incentives and other policies. Such policies generally do not have an impact on growth rates in a region, but may cause shifts of population and employment among cities. In fact, population forecasts are often viewed as “self-fulfilling prophecies.” In many respects they are intended to be; local governments create land use, transportation, and infrastructure plans to accommodate the growth forecast. Those planning documents represent a series of policy decisions—and influence public investments for infrastructure and services. Thus, how much population a local government (particularly cities) chooses to accommodate is also a policy decision.

Because of these and other limitations and uncertainties, this report attempts to assess not only historic and projected growth rates for Clackamas County’s rural cities, but also factors in actual growth (number of people or households annually) and local knowledge of factors that would positively or negatively affect population growth in the cities.

SECTION IV: FORECASTS

Regional and Countywide forecasts

Table 5 shows Metro's household and job allocations for 2010 and forecasts for 2025 and 2035 for Clackamas County. The data are grouped as totals "within the Metro UGB" and those "outside the Metro UGB" the rural cities and rural unincorporated area.

2010 Allocations

Household estimates developed for the regional travel demand model showed that the rural area of Clackamas County had 39,837 households, 27.4% of the total 145,421 households in Clackamas County. In the rural area outside the Metro boundary, the 2010 allocation has 14,812 households within the TAZ groups of the five rural cities; and the majority of rural area housing, 25,025 households, in unincorporated areas. The household estimate in the rural cities' area compares well with the 2010 Census data which counted 13,177 occupied housing units in the five cities.

The 2010 job estimates developed for the regional travel demand model showed that just over 9% of the jobs (12,883) in Clackamas County are in the TAZ groups of the rural cities, and that an additional 7.1% of jobs (9,759) are in the rural unincorporated area.

2025 and 2035 Forecasts

The first forecast produced by Metro for the jurisdictions to review was for the period from 2010 to 2025. For the County as a whole, this forecast projected a 1.7% average annual growth rate (AAGR), equating to 41,294 new households by 2025. Metro further estimated that 68.0% of the new households (27,506 dwellings) would go inside the Metro urban growth boundary (UGB). The highest average annual rate of growth, 2.2%, was attributed to the rural cities, which are the subject of this report. A total of 6,408 new households were projected for the TAZ groups of the rural cities (see Table 5).

Interestingly, the rural, unincorporated area, with a forecasted AAGR in households of 1.5% (7,380 households), is expected to support more new development than the rural cities. While a small portion of this can be attributed to urban reserve areas (estimated at approximately 1,000 households), this amount of projected new household growth may not be supported in the remainder of the rural areas because of the zoning regulations that protect farm and forest lands from general residential development.

The 2035 Gamma Forecast was next released for review. For the County as a whole, this forecast projected growth to slow to a 0.9% average annual growth rate (AAGR), equating to only 16,696 new households between 2025 and 2035. Metro further estimates that only 44% of this growth would occur inside the Metro urban growth boundary (UGB).

The 2035 Gamma Forecast exposed some changes in expected growth patterns in the region and especially in Clackamas County. Metro has indicated that a primary reason for higher-than expected growth in some of Clackamas County's rural areas in both the 2025 and the 2035 Gamma Forecast is that the supply of residential land for single-family homes is dwindling in the metro area UGB, which, when combined with the assumption that the metro area UGB will not expand substantially in Clackamas County during the forecast period, drives the price of homes in the metro area higher, thus diverting household growth to the rural areas, which have historically provided less expensive housing stock.

**Table 5. Number of Households and Jobs in Clackamas County
2010 Existing and 2025 and 2035 Metro-Generated Forecasts**

HOUSEHOLDS	YEAR 2010		Forecasted Change 2010-2025		YEAR 2025		Forecasted Change 2025-2035		YEAR 2035	
	<i>Households</i>	<i>% of County Total</i>	<i>Amount</i>	<i>AAGR</i>	<i>Households</i>	<i>% of County Total</i>	<i>Amount</i>	<i>AAGR</i>	<i>Households</i>	<i>% of County Total</i>
Households Inside Metro UGB										
Urban cities	70,236	50.0%	23,636	2.0%	93,872	51.6%	5,188	0.5%	99,060	49.9%
Unincorporated urban area	25,270	18.0%	3,870	1.0%	29,140	16.0%	2,113	0.7%	31,253	15.7%
Total Households Inside Metro UGB	95,506	68.0%	27,506	1.7%	123,012	67.7%	7,301	0.6%	130,313	65.7%
Households Outside Metro UGB										
Rural cities*	16,322	11.6%	6,408	2.2%	22,730	12.5%	3,087	1.3%	25,817	13.0%
Rural unincorporated areas	28,641	20.4%	7,380	1.5%	36,021	19.8%	6,308	1.6%	42,329	21.3%
Total Households Outside Metro UGB	44,963	32.0%	13,788	1.8%	58,751	32.3%	9,395	1.5%	68,146	34.3%
Total Households in Clackamas County	140,469	100.0%	41,294	1.7%	181,763	100.0%	16,696	0.9%	198,459	100.0%

* Based on TAZ group boundaries (not city boundaries). Does not include any adjustments made to city projections during the county-city coordinated process.

Source: Metro, Clackamas County

Because of the projected changing growth patterns, uncertainty about timing of changes, and the fact that it appears that the projections in the 2035 Gamma Forecast were in some cases intended to fix issues with the initial 2025 forecast, the remainder of this report will look at the 2035 forecast as an endpoint and assess the reasonableness of that forecast given each city’s historic growth as well as other factors, described previously and in Appendix A. The rural cities’ forecasts for 2012 to 2032 will then be extrapolated from the 2035 Gamma Forecast.

OEA versus Metro Forecast

On a countywide level, Metro’s 2035 forecast compares reasonably to those completed or being completed by the State’s Office of Economic Analysis (OEA). Metro’s 2035 forecast is lower than the forecast completed by OEA in 2004, prior to the recession but is nearly identical (<1% difference) to the 2012 draft long-range forecast that was recently distributed to the counties for review.⁷

Table 6. Metro 2035 Gamma Forecast versus OEA Long-Range Forecast. Clackamas County

	2010 est.	2035 forecast	2010-2035 Growth	2010-2035 AAGR
OEA forecast (adopted 2004)	391,536	576,231	184,695	1.56%
Metro forecast*	362,129	511,627	149,498	1.39%

*Households are converted to population for comparison purposes assuming 2.58 persons per household (Clackamas County average per US Census).

Rural County and Cities Draft Forecasts

The County has agreed to accept the forecast of 23,182 new households (2010 to 2035) as the “control total” for rural Clackamas County (outside the Metro UGB) for the purposes of this coordinated population forecast process. This control total includes households in the rural cities as well unincorporated rural communities and other unincorporated rural areas in the county. In accepting this control total for the rural areas, any adjustments that are found to be necessary to individual city forecasts, or elsewhere, need to be made within this total.

In general, growth allocations in Metro’s 2035 Gamma Forecast appear a bit generous in the rural unincorporated areas (projecting 13,688 new households) and slightly low in some of the rural cities. One reason Metro’s forecast may be low in some of the rural cities is that it does not assume that the cities will expand their urban growth boundaries (UGBs) and, therefore, if land supply is limited, so too is the forecast. Fortunately, the rural cities have the ability to expand their UGB’s if there is a need identified based on projected growth and existing supply.

Individual city forecasts, analysis of those forecasts and a description of any changes made to the Metro forecast follow in the next section. Several of the rural cities have completed transportation system plans or land-use related plans. These plans, combined with historic population growth data and individual knowledge of localized factors affecting population growth (see Appendix A), provide the basis for evaluating Metro household and forecasts. Projected growth for each city is also analyzed in the context of historic growth.

⁷ The final 2012 OEA forecast is expected in February 2013 and will be incorporated into this report if time allows.

Individual plans completed for the cities used varying timeframes for forecasts. To compare these values with Metro’s 2010 allocation and 2025 and 2035 forecasts, the city forecasts were adjusted using each study’s average annual growth rate to determine the 2010 and 2035 values, as applicable.

BARLOW

The Metro 2035 Gamma Forecast projects growth of only 5 new households between 2010 and 2035 in the TAZ group⁸ that includes the city of Barlow. Assuming the City of Barlow captures 90% of this new growth this projection results in a total population of 148 people in the city in 2035.⁹

Table 7. Historic and Projected Population Growth. City of Barlow

Year	Population	AAGR	Avg. annual increase
1960	85		
1970	105	2.1%	2
1980	105	0.0%	0
1990	115	0.9%	1
2000	140	2.0%	3
2010	135	-0.4%	-1
2035	148	0.4%	0.5

Source: US Census & Metro & Clackamas County

Analysis of City of Barlow Forecast: The 2035 Metro Gamma Forecast indicates the population of the city will remain relatively steady, as it has over the last several decades. Given the fact that growth opportunities in Barlow are very limited, mainly due to the lack of a sewer system, this forecast seems reasonable.

No adjustments were made to this forecasted growth were made, nor were any requested by city representatives. Extrapolating from this forecast for the 20-year planning horizon of 2012-2032 specified for this project yields the following for the City of Barlow:

2012 population: 136

2032 population: 146

⁸ Includes TAZ#: 848

⁹ Note: As mentioned in the “Methodology” section, Metro forecasts are by TAZ area, which are larger than the city itself; however because of development limitations on rural lands in Clackamas County, it is assumed that 90% of the new growth projected in the city’s TAZ group will actually occur within the city. Households are converted to population using each city’s average household size as reported in the 2010 US Census.

CANBY

The Metro 2035 Gamma Forecast projected 4,951 new households between 2010 and 2035 in the TAZ group that includes the city of Canby.

Table 8. Metro Gamma Forecast Households 2010 to 2035. Canby TAZ Group¹⁰

2010 Existing	2035 Projection	Household Change
6,628	11,579	4,951

Assuming the City of Canby captures 90% of this new growth, this projection results in a total of 4,456 new households in the city between 2010 and 2035 resulting in a total of approximately 10,150 households, or 28,220 people in the city in 2035.⁷

The growth forecast suggested by Metro is compared to historic growth below. As suggested by this comparison, the forecast for approximately 28,220 people in Canby by 2035 is within the range of growth rates seen in the city over the last several decades but does represent an increase in the average number of new people annually in the city over the last two decades.

Table 9. Historic and Projected Growth. City of Canby

Year	Population	AAGR	Avg. annual increase
1960	2,178	---	---
1970	3,813	5.8%	164
1980	7,659	7.2%	385
1990	9,115	1.8%	146
2000	12,790	3.4%	368
2010	15,829	2.2%	304
2035	28,220	2.3%	495

Source: US Census & Metro & Clackamas County

Table 10 provides a comparison of the City’s forecasts for households and jobs found in the City’s Transportation System Plan (December 2010), with Metro’s forecasts for household and jobs. Projected jobs growth is shown in the table for context;¹¹ to the extent that strong (or weak) jobs growth occurs, so could population growth. It should be noted that both the forecasts found in Canby’s TSP are “buildout” forecasts, in which the city assumes it will be fully built out by 2030, and are therefore not necessarily market driven and are limited by supply of buildable lands within the current UGB.

¹⁰ Includes TAZ#: 843,844,847,846,845

¹¹ This report makes no attempt to assess or reconcile economic forecasts from the 2035 Metro Gamma Forecast with the city’s forecasts. Employment forecasts are presented for context only.

Table 10.

City of Canby	2010	Projected Growth 2010 - 2035	AAGR 2010-2035	2035
Households				
Households (UGB) <i>2010 City TSP (1)</i>	6,337	5,245	2.4%	11,582
Households in City of Canby <i>Metro Regional Forecast/ Coordinated Forecast</i>	5,694*	4,456	2.4%	10,150
Jobs				
Jobs (UGB) <i>2010 City TSP (1)</i>	4,185	2,201	3.4%	9,688
Jobs in TAZ group <i>Metro's Regional Forecast</i>	5,592	3,490	2.0%	9,082

*Per 2010 US Census

(1) **City of Canby Transportation System Plan, December 2010.** (DKS & Associates)

Canby's TSP forecasted 4,403 new households between 2009 and 2030. Based on this forecast, an average annual increase of 210 households was calculated and used to estimate 2010 and 2035 households.

Canby's TSP forecasted 4,623 new jobs between 2009 and 2030. Based on this forecast, an average annual increase of 220 jobs was calculated and used to estimate 2010 and 2035 jobs.

Analysis of City of Canby Forecast: The 2035 Metro Gamma Forecast indicates stronger population growth than the city has historically seen in terms of actual numbers of people per year. However, both Metro and the city's consultant for their Transportation System Plan (TSP) are projecting very strong employment growth in the city over the forecast period. This strong economic growth would, in turn, support strong and even increased population growth.

Supporting this expectation of strong economic and population growth are several factors:

The city is being very pro-active about positioning themselves to attract new business investments and jobs:

- A downtown retail study and marketing materials were recently completed
- The Urban Renewal District plans to invest in infrastructure and offers an SDC reimbursement incentive program for job creation and new construction
- Created a Strategic Investment Zone 15 year property tax abatement for investments over \$25 million
- There is currently low reported vacancy in commercial and industrial
- There is a team studying business recruitment & retention and marketing of industrial employment opportunities
- The city has 200+ acres of shovel-ready industrial land

The city has also expressed the willingness and ability to accommodate this level of growth.

Given all these factors and the fact that Canby offers an attractive and accessible location for both employers and residents at a price advantage over nearby urban areas, county staff feels that Canby is positioned well to achieve the level of growth projected in the 2035 Gamma Forecast.

No adjustments were made to the growth forecasted in the 2035 Gamma Forecast, nor were any requested by city representatives. Extrapolating from this forecast for the 20-year planning horizon of 2012-2032 specified for this project yields the following for the City of Canby:

2012 population: 16,820

2032 population: 26,730

ESTACADA

The Metro 2035 Gamma Forecast projected 924 new households between 2010 and 2035 in the TAZ group that includes the city of Estacada.

Table 11. Metro Gamma Forecast Households 2010 to 2035. Estacada TAZ Group¹²

2010 Existing	2035 Projection	Household Change
1,658	2,582	924

Assuming the City of Estacada captures 90% of this new growth, this projection results in a total of 832 new households in the city between 2010 and 2035 representing a total of approximately 1,886 households, or 4,820 people in the city in 2035.⁷

The growth forecast suggested by Metro is compared to historic growth below. As suggested by this comparison, the forecast for approximately 4,820 people in Estacada by 2035 is within the range of growth rates seen in the city over the last several decades, but represents a sizeable increase over the highest average number of new people annually in the city.

Table 12. Historic and Projected Growth. City of Estacada

Year	Population	AAGR	Avg. annual increase
1960	957		
1970	1,164	2.0%	21
1980	1,419	2.0%	26
1990	1,983	3.4%	56
2000	2,475	2.2%	49
2010	2,695	0.9%	22
2035	4,820	2.4%	85

Source: US Census & Metro & Clackamas County

The only population forecast recently completed for the City of Estacada is found in the “Final Economic Opportunity Analysis (EOA) Report” (2009). The forecast in the EOA, however, was completed using the “safe harbor” methodology described in OAR 660-024-0030(4) and ORS 195.034(B), which simply extrapolates a city’s future population based on its proportion of the county’s total population and is not trend or market based. As such this forecast is not necessarily a good

¹² Includes TAZ#: 840,841,842

comparison. Projected jobs growth for the Estacada/Eagle Creek area (as defined in the EOA) is shown in the table for context.

Table 13.

City of Estacada	2010	Projected Growth 2010 - 2035	AAGR 2010-2035	2035
Households				
Households (2,538 persons/DU) <i>2010 City EOA (1)</i>	1,082	507	1.5%	1,589
Households in City of Estacada <i>Coordinated Forecast</i>	1,055*	832	2.4%	1,886
Jobs				
Jobs (Estacada/Eagle Creek area) <i>2010 City EOA (1)</i>	1,619	2,593	3.9%	4,212
Jobs in TAZ group <i>Metro's Regional Forecast</i>	1,427	1,682	3.2%	3,109

*Per 2010 US Census

(1) **City of Estacada Final Economic Opportunity Analysis (EOA) Report**. June 14, 2009. (Cogen Owens Cogan, LLC; Marketek Inc.) Estacada's EOA forecasted population using "safe harbor" through 2029. Based on this forecast, an average annual increase of 51.5 persons was calculated and used to estimate 2010 and 2035 population and households. Based on the employment forecast found in this report, an average annual increase of 103 jobs in the "Estacada/Eagle Creek Area" was calculated and used to estimate 2010 and 2035 employment. Note different geographies.

Analysis of City of Estacada Forecast: The 2035 Metro Gamma Forecast indicates stronger population growth than the city has historically seen in terms of actual numbers of people per year and average annual growth rates. Like Canby (previously discussed), Estacada is proactively trying to position itself for both economic and residential growth.

- The city recently added 130 acres of industrial land to its UGB, which is expected to be available for development as early as next year. The recent success of the existing industrial park leads the city to be optimistic about this new industrial area will successfully attracting new employers and jobs.
- The city also created an Urban Renewal District in its downtown area and has identified improvements that will be completed as is possible.
- Both the city's EOA and Metro are forecasting very strong economic growth in Estacada between 2010 and 2035. This growth would support stronger population growth than Estacada has seen in recent years.

In addition, city staff stated that they had approved several large residential subdivisions in the last 7-8 years, some of which were put on hold when the housing market took a negative turn. However, a bank has purchased several of these subdivisions and has started constructing new homes – at a rate of around 40 per year. Furthermore, Estacada is the only of the rural cities that did not see a decline in residential building permits in the post-2008 housing crash (see Table 4). The city appears poised to quickly accommodate residential growth as demand warrants.

No adjustments were made to the growth forecasted in the 2035 Gamma Forecast, nor were any requested by city representatives. Extrapolating from this forecast for the 20-year planning horizon of 2012-2032 specified for this project yields the following for the City of Estacada:

2012 population: 2,845

2032 population: 4,345

MOLALLA

The Metro Gamma Forecast projected 1,516 new households between 2010 and 2035 in the TAZ group that includes the city of Molalla.

Table 14. Metro Gamma Forecast Households 2010 to 2035. Molalla TAZ Group¹³

2010 Existing	2035 Projection	Household Change
3,743	5,259	1,516

Assuming the City of Molalla captures 90% of this new growth, this projection results in a total of 1,366 new households in the city between 2010 and 2035 resulting in a total of approximately 4,240 households, or 11,960 people, in the city in 2035.⁷

The growth forecast suggested by Metro is compared to historic growth below. As suggested by this comparison, the forecast for approximately 11,960 people in Molalla by 2035 is lower than growth rates seen in the city over the last several decades and represents a sizeable decrease over the average number of new people annually in the city over the last two decades.

Table 15. Historic and Projected Growth, City of Molalla

Year	Population	AAGR	Avg. annual increase
1960	1,501		
1970	2,005	2.9%	50
1980	2,992	4.1%	99
1990	3,683	2.1%	69
2000	5,738	4.5%	206
2010	8,108	3.5%	237
2035	11,960	1.6%	154

Source: US Census & Metro & Clackamas County

An economic profile for the City of Molalla was completed in 2005. That study’s forecasted population and jobs growth is listed in the table below for comparison with the 2035 Metro Gamma Forecast for Molalla. As shown, the 2035 Metro Gammas Forecast is lower than that study’s forecast both in terms of average annual growth rate and actual household growth. The employment forecast found in the city’s economic report is high because it is a “policy” forecast, based on the city’s objective to improve

¹³ Includes TAZ#: 849,850,851,852,853. Note: Upon further review, TAZ 849 (located along on the west side of Hwy 213) was included in Molalla’s TAZ group and therefore, numbers reported in this draft will differ from the first review draft (released for city review in September 2012).

its housing/jobs balance to “regain its status as a somewhat independent economic region rather than a bedroom community.”

Table 16.

City of Molalla	2010	Projected Growth 2010 - 2035	AAGR 2010-2035	2035
Households				
Dwelling Units (UGB) <i>2005 City Economic Profile (1)</i>	2,579	1,817	2.5%	4,396
Households in City of Molalla <i>Metro Regional Forecast</i>	2,874*	1,366	1.6%	4,240
Jobs				
Jobs (UGB) <i>2005 City Economic Profile (1)</i>	3,215	4,670	3.7%	7,885
Jobs in TAZ group_ <i>Metro's Regional Forecast</i>	2,683	2,166	2.4%	4,849

*Per 2010 US Census

(1) **City of Molalla, Economic Profile Memorandum** (Feb. 16, 2005)

Data from Metro Regional Data Book, 2002, Oregon Population Research Center, E. D. Hovee & Company.

Molalla’s Economic Profile report forecasted 1,598 new households between 2003 and 2025. Based on this forecast, an average annual increase of 72.6 households was used to estimate 2010 and 2035 households.

Molalla’s Economic Profile report forecasted 4,110 new jobs between 2003 and 2025. Based on this forecast, an average annual increase of 186.8 households was used to estimate 2010 and 2035 households.

Analysis of City of Molalla Forecast: The 2035 Metro Gamma Forecast indicates weaker population growth than the city has seen over the last two decades in terms of actual number of people per year, as well as the average annual rate of growth. There is nothing to indicate to county staff that growth in Molalla would slow substantially in the future compared with historic growth (on average) with the exception of the fact that a buildable lands inventory completed in 2008 found a very limited supply of buildable residential land in the city’s UGB. However, as mentioned previously, this forecast analysis assumes that a rural city could possibly expand its UGB if it is deemed necessary to accommodate 20 years of growth. Thus, it appears that Molalla’s forecast was held artificially low because of the lack of developable residential land in the city.

Like the other rural cities, Molalla has been proactively seeking to attract more business investment to increase its economic base, including working with county economic development staff to identify and market industrial sites in the city, planning for changes in the downtown area, creating both an Urban Renewal District and an Enterprise Zone and working on improvements to make exiting industrial areas more buildable.

City representatives also report not only are there several developers expressing interest in subdividing and developing their properties with single family homes but there has been a recent uptick in single family home development (as evidenced by permits). Molalla remains an attractive place to live at a lower cost than the urban areas to the north.

An assessment of the TAZs immediately adjacent to the TAZ group that includes Molalla was completed, looking at projected growth and zoning in those areas. This assessment indicated that the amount of household growth allocated to three of these TAZs would not likely occur in that location, because of zoning restrictions on residential development. Therefore, it would be reasonable to expect that a portion of this growth allocated to these areas would actually occur in the city because of the limited availability of developable land in the rural, and particularly natural resource zones.

Adjustments to Molalla Forecast:

Based on the conclusion that the 2035 Gamma Forecast for the city was too low and the forecast to several rural areas near the city was too high given existing zoning, the following revisions were made to the 2035 Gamma Forecast (See Appendix D for map of TAZ locations).

Table 17. Forecast Revisions - Molalla

TAZ #	2035 Gamma Forecast Household Growth 2010-2035	Net Household Change	Adjusted Household Growth 2012-2035
Molalla TAZ Group (849,850,851,852,853)	1,516	507	2,023
918	83	(66)	17
920	334	(267)	67
921	248	(174)	74
Total	2,181	0	2,181

Source: Metro, Clackamas County

The resulting increase in growth in the City of Molalla is shown in the Tables 18 and 19, below. As shown, this forecast is more on-par with historic growth over the last two decades. These adjustments have been reviewed by city representatives.

Table 18. Revised Forecast – 2010 to 2035

City of Molalla	2010	Projected Growth 2010 - 2035	AAGR 2010-2035	2035
Households				
Dwelling Units (UGB) <i>2005 City Economic Profile (1)</i>	2,579	1,817	2.5%	4,396
Households in City of Molalla <i>Coordinated Forecast</i>	2,874*	1,876	2.0%	4,750

Source: Metro, Clackamas County

Table 19. Historic and Projected Growth, City of Molalla

Year	Population	AAGR	Avg. annual increase
1960	1,501		
1970	2,005	2.9%	50
1980	2,992	4.1%	99
1990	3,683	2.1%	69
2000	5,738	4.5%	206
2010	8,108	3.5%	237
2035(revised)	13,400	2.0%	212

Source: US Census & Metro & Clackamas County

Extrapolating from this forecast for the 20-year planning horizon of 2012-2032 specified for this project yields the following for the City of Molalla:

2012 population: 8,532

2032 population: 12,760

SANDY

The Metro 2035 Gamma Forecast projected 2,310 new households between 2010 and 2035 in the TAZ group that includes the City of Sandy.

Table 20. Metro Gamma Forecast Households 2010 to 2035. Sandy TAZ Group¹⁴

2010 Existing	2035 Projection	Household Change
4,325	6,635	2,310

Assuming the City of Sandy captures 90% of this new growth, this projection results in a total of 2,079 new households in the city between 2010 and 2035 resulting in a total of approximately 5,682 households, or 15,230 people, in the city in 2035.⁵

The growth forecast suggested by Metro is compared to historic growth below. As suggested by this comparison, the forecast for approximately 15,230 people in Sandy by 2035 represents a lower than growth rates seen in the city over the last several decades and represents a 48% decrease from the average number of new people annually in the city during the last decade but a 74% increase of average growth for the previous three decades.

¹⁴ Includes TAZ#: 834,835,836,837,838,839

Table 21. Historic and Projected Population Growth, City of Sandy.

Year	Population	AAGR	Avg. annual increase
1960	1,147		
1970	1,544	3.0%	40
1980	2,905	6.5%	136
1990	4,152	3.6%	125
2000	5,385	2.6%	123
2010	9,570	6.0%	427
2035	15,230	1.9%	226

Source: US Census & Metro & Clackamas County

The most recent population forecast recently completed for the City of Sandy is found in the “City of Sandy, Urbanization Study” (2009). The forecast in the Urbanization Study, however, was completed using the “safe harbor” methodology described in OAR 660-024-0030(4) and ORS 195.034(B), which simply extrapolates a city’s future population based on its proportion of the county’s total population and is not trend or market based. As such this forecast is not necessarily a good comparison but is shown in the table below. Projected jobs growth is shown in the table for context.

Table 22.

City of Sandy	2010	Projected Growth 2010 - 2035	AAGR 2010-2035	2035
Households				
Households (UGB) <i>2009 City Urbanization Study (1)</i>	3,741	1,445	1.3%	5,186
Households in City of Sandy <i>Metro’s Regional Forecast</i>	3,603	2,079	1.8%	5,682
Jobs				
Jobs (UGB) <i>2010 City TSP (2)</i>	4,490	2,035	1.5%	6,525
Jobs in TAZ group <i>Metro’s Regional Forecast</i>	3,181	3,449	3.0%	6,630

*Per 2010 US Census

(1) City of Sandy, Urbanization Study, January 2009. (ECONorthwest). This study forecasted 1,214 new households between 2008 and 2029. Based on this forecast, an average annual increase of 57.8 households was calculated and used to estimate 2010 and 2035 households. Note: In this study, the forecast for 2010 was 8,170 persons, 1,400 less than the Census reported for 2010.

(2) Sandy Transportation System Plan, April 2009. (Technical Memo #1, Plans Goals & Policies, page 15; and, Technical Memo #2, Existing Conditions and Future Needs). Sandy’s TSP (Fig. 4-1) forecasted 1,709 new jobs between 2008 and 2029. Based on this forecast, an average annual increase of 81.4 jobs was calculated and used to estimate 2010 and 2035 jobs.

Analysis of Sandy’s forecast:

Representatives from the City of Sandy indicated in an email dated 07/31/2012 that they believe they can and will continue to accommodate high population growth. Individual factors cited include:

- Strong historic population growth
- An attractive location with relatively inexpensive land for development
- A diverse economic base
- Infrastructure available or capacity of expand to accommodate more population growth
- Recent investments, including a new \$100 million state-of-the-art high school
- A willingness to consider expanding into the city’s existing urban reserve

(See Appendices A and B for more details)

County staff agrees that Sandy probably can and will attract higher population growth than is indicated by the 2035 Gamma Forecast. Furthermore, the Gamma Forecast projects a relatively large number of new households in the Government Camp area and other areas past Sandy on Hwy 26. Due to rural zoning in those areas, it is not likely the nearly 2,000 new households forecast by Metro for the area could actually be accommodated. It follows logically that these households, which would be inclined to move to this area, would actually end up in City of Sandy, where much more substantial residential development can occur.

Adjustments to Sandy Forecast:

The following adjustments were made to the 2035 Gamma Forecast. An initial adjustment of 1,000 households from TAZ #961 (which includes the Village at Mt Hood and Government Camp) was made, per the county’s and city’s request in September, 2012, and are reflected in forecasts and TAZ distributions adopted by Metro in November, 2012.

At the request of the city, further assessment was completed and an additional 330 households were re-allocated from TAZ #s 961 and 960, as noted below. (See Appendix D for map of TAZ locations)

Table 23. Revisions to Forecast - Sandy

TAZ #	2035 Gamma Forecast Household Growth 2010-2035	Initial Adjustment (Sept. 2012)		Second Adjustment (Jan. 2013)	
		Net Household Change	Adjusted Household Growth 2012-2035	Net Household Change	Adjusted Household Growth 2012-2035
Sandy TAZ Group (834,835,836,837,839)	2,310	1,000	3,310	330	3,640
961	2,249	(1,000)	1,249	(250)	999
960	400	0	400	(80)	320
Total	4,959	0	4,959	0	4,959

Source: Metro, Clackamas County

The resulting increase in growth in the City of Sandy is shown in the two tables below. As shown, this forecast is more on-par with historic growth rates and growth over the last decade. These revisions have been reviewed by city representatives.

Table 24. Revised 2035 Forecast - Sandy

City of Sandy	2010	Projected Growth 2010 - 2035	AAGR 2010-2035	2035
Households				
Households (UGB) <i>2009 City Urbanization Study</i>	3,741	1,445	1.3%	5,186
Households in City of Sandy <i>Coordinated Forecast</i>	3,606	3,521	2.8%	7,127

Table 25. Historic and Projected Growth, City of Sandy

Year	Population	AAGR	Avg. annual increase
1960	1,147	---	---
1970	1,544	3.0%	40
1980	2,905	6.5%	136
1990	4,152	3.6%	125
2000	5,385	2.6%	123
2010	9,570	6.0%	427
2035(revised)	19,100	2.8%	381

Source: US Census & Metro & Clackamas County

Extrapolating from this forecast for the 20-year planning horizon of 2012-2032 specified for this project yields the following for the City of Sandy:

2012 population: 10,322

2032 population: 17,960

Summary

The following is a summary of the 20-year coordinated population projections that result from this analysis and the collaborative efforts of the county, metro and the five rural cities in Clackamas County.

Table 26. Summary of 2012-2032 Projections by City

City	2012 population	2032 population	Net growth 2012-2032	AAGR 2012-2032
Barlow	136	146	10	0.4%
Canby	16,820	26,730	9,910	2.3%
Estacada	2,845	4,345	1,500	2.1%
Molalla	8,532	12,760	4,228	2.0%
Sandy	10,322	17,960	7,628	2.8%

Source: US Census, Metro, Clackamas County

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APPENDIX A
INFORMATION CONSIDERED IN ASSESSMENT OF CITY POPULATION FORECASTS

The information in the table below is obtained from information county staff gleaned from planning documents and reports and from feedback submitted by the cities to county staff. The information pertains to population and housing characteristics of Clackamas County’s five rural cities, and to changes believed to occur in those areas in the future.

Population Composition	Housing	Employment Information	Infrastructure/ Land Capacity	Factors Affecting Population Growth (Positive or Negative)/ Other Notes
Barlow				
<p>Low, stable population of approx. 135 -140 persons</p> <p>Growth relatively flat for the last four decades (0.6% annually) with slightly negative growth (-0.4%) from 2000 to 2010 (US Census).</p>	<p>Predominantly owner-occupied homes (93.1%)</p> <p>2010 occupancy rate high (97.8%)</p> <p>Median home sales prices averaged nearly 50% lower than those of the county’s urban cities over the last 10 years (based on County tax assessor data)</p>	<p>Small rural industrial area along southern boundary of city.</p> <p>City is adjacent to Canby, which offers a wide range of employment opportunities.</p>	<p>No sewer system limits development and potential increases in density and/or redevelopment</p>	<p>Limitations to growth due to:</p> <p>(1) Lack of sewer system – entire city is on septic systems</p> <p>(2) Rural reserves for Clackamas County will nearly surround the city, severely limiting the possibility of expanding UGB to accommodate more growth. Acknowledgement of these reserves is forthcoming from DLCD.</p>

APPENDIX A
INFORMATION CONSIDERED IN ASSESSMENT OF CITY POPULATION FORECASTS

Population Composition	Housing	Employment Information	Infrastructure/ Land Capacity	Factors Affecting Population Growth (Positive or Negative)/ Other Notes
Canby				
<p>Strong population growth, averaging 3.4% annually over last 50 years and 4.0% over last</p> <p>Younger and larger households than county. Average age of 35.7 years versus 40.6 years old countywide. Avg. household size 2.78 persons, versus 2.56 countywide</p>	<p>Approximately 2/3rds owner occupied and 1/3rd renter-occupied homes</p> <p>2010 occupancy rate high (95.9%)</p> <p>Median home sales prices 20% to 36% lower than those of the county's urban cities over the last 10 years (based on County tax assessor data)</p>	<p>Diverse economic base, ranging from agriculture to heavy industrial.</p> <p>Historic downtown receiving investment to improve and attract more retail and service businesses</p> <p>Projected employment growth from both the Metro and the city's consultant (for TSP) is expected to be very high over the forecast period</p>	<p>City's Urban Renewal District is funding infrastructure to develop employment land and invest in an attractive downtown</p> <p>City's TSP estimates a capacity for approx. 4,400 new households and 4,600 new jobs in the city</p> <p>City has purchased land to expand water plant should it be needed as population grows – already have water rights for new intake off Willamette River</p> <p>Currently have 50% excess sewer capacity</p>	<p>Positive:</p> <ul style="list-style-type: none"> • City is being very pro-active about positioning themselves to attract new business investments and jobs. • The City's Urban Renewal District offers an SDC reimbursement incentive program for job creation and new construction • City has Strategic Investment Zone - 15 year property tax abatement for investments over \$25 million. • Recently completed a downtown retail study and developed marketing materials to attract investment in the downtown area • 200+ acres of shovel-ready industrial land • Economic Development is heading team to discuss business recruitment & retention and marketing of industrial employment opportunities • City offers electrical rates 30% lower than other locations – attractive to industry

APPENDIX A
INFORMATION CONSIDERED IN ASSESSMENT OF CITY POPULATION FORECASTS

Population Composition	Housing	Employment Information	Infrastructure/ Land Capacity	Factors Affecting Population Growth (Positive or Negative)/ Other Notes
Estacada				
<p>Moderate population growth over last 40 years (2.1% annually), which has dropped in the last 20 years of an average of 1.5% annually.</p> <p>Younger households than countywide (35.7 years versus 40.6 years old on average)</p>	<p>60.3% of homes owner-occupied and 39.7% of homes renter-occupied homes</p> <p>2010 occupancy rate relatively low (91.9%)</p> <p>Median home sales prices 40% to 49% lower than those of the county's urban cities over the last 10 years (based on County tax assessor data)</p>	<p>Existing industrial park has been successful – recently added 130 acres of industrial land to UGB that are expected to be ready for development within a year.</p> <p>Success of this new development will create jobs and help to further diversify the economic base</p>	<p>---</p>	<p>Positive:</p> <ul style="list-style-type: none"> • Attractive location with nearby recreational activities • Relatively inexpensive land and lower housing costs than region • City created an Urban Renewal District to encourage economic vitality and livability with planned projects such as streetscape improvements & pedestrian facilities; public parking; water and sewer system improvements; and riverfront pedestrian, bicycle and public recreational facilities • Emerging arts community • Recently added 130 acres of industrial land to UGB <p>Negative:</p> <ul style="list-style-type: none"> • Limited access for industrial and other employment development that relies on highway transportation.

APPENDIX A
INFORMATION CONSIDERED IN ASSESSMENT OF CITY POPULATION FORECASTS

Population Composition	Housing	Employment Information	Infrastructure/ Land Capacity	Factors Affecting Population Growth (Positive or Negative)/ Other Notes
Molalla				
<p>Strong population growth, averaging 3.4% annually over last 50 years and 4.0% over last</p> <p>Household size averages 2.82 persons, larger than in the County (2.56)</p>	<p>Approximately 2/3rds owner-occupied (66.4%) and 1/3rd renter-occupied (33.6%) homes</p> <p>2010 occupancy rate relatively high (94.7%)</p> <p>Median home sales prices 37% to 48% lower than those of the county's urban cities over the last 10 years (based on County tax assessor data)</p>	<p>The city's employment base has not kept pace with its fast growing residential population but some industrial expansion is beginning to occur (Brentwood MFG. & NW Polymers)</p> <p>Growing visitor market – tourism</p> <p>City working to make more industrial land ready for development</p> <p>City actively seeking to attract more business investment</p>	<p>According to recently-completed buildable lands inventory, the supply of buildable residential land within current urban growth boundary (UGB) is very limited</p> <p>City may need to expand UGB or develop at greater densities to accommodate higher population growth</p> <p>Any growth past approximately 14,000 people will require a substantial investment to provide new residents with water</p>	<p>Positive:</p> <ul style="list-style-type: none"> • Attractive location with nearby recreational activities • Relatively inexpensive land and lower housing costs than region. • City plans to complete/revise several planning projects as soon as this forecast is completed, all of which could help encourage new development: a downtown redevelopment plan; an updated Comprehensive Plan including some possible plan designation changes; and an updated Parks plan • Currently has an Urban Renewal District and an Enterprise Zone • Recent increase in SF home activity and interest from developers to build new subdivisions <p>Negative:</p> <ul style="list-style-type: none"> • Relatively few job and retail opportunities for residents • Limited amount of buildable residential land

APPENDIX A
INFORMATION CONSIDERED IN ASSESSMENT OF CITY POPULATION FORECASTS

Population Composition	Housing	Employment Information	Infrastructure/ Land Capacity	Factors Affecting Population Growth (Positive or Negative)/ Other Notes
Sandy				
<p>Rapidly growing population – growth averaged 4.3% annually over the last 20 years and 4.4% over the last 70 years</p> <p>Household size averages 2.68 persons, slightly larger than in the County (2.56)</p> <p>Median household income the City (\$56,700) slightly higher than that of the State (\$53,500).</p>	<p>63.7% of homes owner-occupied and 36.3% of homes renter-occupied homes</p> <p>2010 occupancy rate relatively high (94.7%)</p> <p>Median home sales prices 32% to 41% lower than those of the county’s urban cities over the last 10 years (based on County tax assessor data)</p>	<p>Diverse but relatively small economic base; population in city affected by regional economic trends</p> <p>Many residents in Sandy work in other parts of the region (east and west of the city)</p> <p>An estimated 406 businesses operate within a two-mile radius of downtown Sandy and employ nearly 3,000 persons. The largest share of employees work in the retail trade sector (35%), followed by services (29%) and manufacturing (8%) (Source: Sandy Retail Market Report)</p> <p>Large visitor market - tourism</p>	<p>City has available infrastructure (sewer, water, etc) capacity or the ability to expand capacity to accommodate growth (per city manager)</p> <p>New \$100 million state-of-the-art high school.</p> <p>Has buildable land – also has a 2,000+ acre urban reserve (created in 1998) from which the city has not yet drawn land for urban development in the UGB</p>	<p>Positive:</p> <ul style="list-style-type: none"> • Attractive location to reside because it offers good access to outdoor recreation as well as to the more urban amenities in the metro area • Relatively inexpensive land • Municipal ISP (SandyNet) that will provide inexpensive fiber Internet service to all homes and businesses • Fareless bus connections to MAX and Tri Met system. • City actively seeking to attract more business investment <p>Negative:</p> <ul style="list-style-type: none"> • Limited highway connections to Interstate freeway system

APPENDIX B

DOCUMENTATION OF COORDINATION WITH RURAL CITIES

Clackamas County staff engaged in a variety of outreach with the five rural cities in the county, including emails, phone calls, meetings, and presentations. Each city was invited to participate in a group meeting as well as individual meetings with county staff. Four of the five cities participated in these meetings and provided valuable information and feedback to this process. A representative of the fifth city, Barlow, participated via phone.

To begin the coordination process, county staff sent out an email to city planning representatives on February 28, 2012, describing the rural cities population forecast project and asking for contact information for additional city staff that would be interested in participating in the project. On March 13, 2012, a kick-off meeting was held at county offices in which the same planning staff and city representatives were invited. Staff from Canby, Estacada, Molalla and Sandy attended this meeting, at which the scope of work and expected timing for the project was explained and county staff requested information from each of the cities, including copies of any recent reports that include population projections, estimates of capacity within their urban growth boundaries, and other materials that might be pertinent.

Initial forecast numbers for the 2010 to 2025 time period were available at the kick-off meeting. City and county staff were given the opportunity to provide feedback to Metro regarding these numbers.

Initial forecast numbers for the 2010 to 2035 period (used in this report) were released by Metro in July 2012. This forecast was summarized and analyzed for the rural areas of the county and incorporated into the first draft Background Report and Forecasts, produced by county staff. The draft Background Report and Forecasts, which extrapolated the 20-year period required for this project to be compliant with ORS 195.025 and ORS 195.036 (2012 to 2032), was sent to the five rural cities for review in September 2012. In this report, county staff requested feedback from each city, particularly with respect to "local knowledge" of factors that might positively or negatively affect future population growth.

Following the release of the draft Background Report and Forecasts, county staff corresponded with each city individually. Staff met with city representatives of Canby, Estacada, Molalla and Sandy separately to discuss each city's forecast and gain a better understand this "local knowledge" and how these local planning efforts, expected near-term development trends, and any expected constraints would affect population growth and possibly justify minor adjustments to the Metro forecasts. These meetings took place in November and December of 2012. Refinements to the forecast for two of the rural cities (Molalla and Sandy) were completed and sent to those cities one last time for feedback in January 2012 and then incorporated into the final Background Report and Forecasts. No revisions were made to other cities' forecasts.

The cities received a copy of the notice sent to DLCD and a copy of the second draft of the report in January 2012 along with an email requesting a written response from each city regarding their forecasts. The report and notices were also posted on the county's website in January 2013.

APPENDIX B

DOCUMENTATION OF COORDINATION WITH RURAL CITIES

The following is a summary of the communications between Clackamas County staff and the five rural cities in Clackamas County regarding the development of the coordinated forecast for 2032. A copy of relevant correspondence sent to and received from the cities is attached to this appendix (correspondence dealing with meeting organization and scheduling is not attached)

Barlow

Because Barlow, a city of about 135 people, does not have a planning department to contact, county planning staff contacted the city's attorney in February 2012 to obtain a contact person for this project. The attorney recommended a former mayor and current city councilman as the best person to be involved in this project. The councilman was contacted via phone and email throughout the course of the project.

An email was sent out in September 2012 with the first draft of the report and forecasts and a request for feedback from the city. Planning staff called this city's representative in December 2012, at which time he indicated verbally that the city had no issues with the forecast. An email was sent to the city in January 2013 with the second draft of the report and forecasts and a request for feedback and a written response to include in the record. A subsequent request was made for a written response in February 2013. To date, no such response has been received.

Canby

County staff contacted the city's planning department in February 2012 to discuss the project and schedule a kick-off meeting, which city staff attended. Both the Planning Director and planning staff participated in this process.

An email was sent out in September 2012 with the first draft of the report and forecasts and a request for feedback from the city. County planning staff met with city planning and economic development staff in December 2012, at which time they provide county staff with information that had been requested regarding "local knowledge" of factors that might positively or negatively affect future population growth. At this meeting city staff indicated that the city was in support of the forecast. An email was sent to the city in January 2013 with the second draft of the report and forecasts and a request for a written response to include in the record. County staff received a letter from the city's Planning Director in February 2013, recommending approval of the forecasts (attached).

Estacada

County staff contacted the city's planner in February 2012 to discuss the project and schedule a kick-off meeting, which the city's planner attended. Because planning services are contracted to the county, (i.e. the city planner is a county staff person), the city manager was also contacted and asked for feedback. Both the city's planner and the city manager participated in this process.

APPENDIX B

DOCUMENTATION OF COORDINATION WITH RURAL CITIES

An email was sent out in September 2012 with the first draft of the report and forecasts and a request for feedback from the city. The city planner responded with some information related to recent development and planning activities in the city. County planning staff met with the city manager in December 2012, at which time he provided county staff with more information regarding "local knowledge" of factors that might positively or negatively affect future population growth. At this meeting the city manager indicated that the city was in support of the forecast. An email was sent to the city in January 2013 with the second draft of the report and forecasts and a request for a written response to include in the record. A subsequent request was made for a written response in February 2013. To date, no such response has been received.

Molalla

County staff contacted the city's planner in February 2012 to discuss the project and schedule a kick-off meeting, which the city's planner. Because planning services for this city are also contracted to the county, the city manager were also contacted and asked for feedback. The city's planner, the city manager and the (current) mayor participated in this process.

An email was sent out in September 2012 with the first draft of the report and forecasts and a request for feedback from the city. The city planner responded with some information related to recent development and planning activities. County planning staff met with the city manager and the mayor (mayor-elect at the time) in December 2012, at which time they provided county staff with more information regarding "local knowledge" of factors that might positively or negatively affect future population growth. Also discussed and agreed upon at this meeting were some revisions to the draft forecast. The revisions, as discussed, were made to the draft forecast and sent to the city in early January 2013 for review. An email was sent to the city in January 2013 with the second draft of the report and forecasts and a request for a written response to include in the record. County staff received a letter from the Interim City Manager in February 2013, recommending approval of the forecast (attached).

Sandy

County staff contacted the city's planning department in February 2012 to discuss the project and schedule a kick-off meeting, which city staff attended. Both the Planning Director and the city manager participated in this process.

An email was sent out in September 2012 with the first draft of the report and forecasts and a request for feedback from the city. The draft forecast in this report already included some revisions requested by the city of Sandy, who had responded in July 2012 to the initial forecast numbers that had been distributed by Metro. In that email response, the city manager answered a number of the "local knowledge" questions that had been asked by county staff in response to his concerns that the forecasts for the city were too low. County planning staff met with city planning staff and the city manager in December 2012, at which some additional revisions to the forecast were and agreed upon.

APPENDIX B
DOCUMENTATION OF COORDINATION WITH RURAL CITIES

The revisions, as discussed, were made to the draft forecast and sent to the city in early January 2013 for review. An email was sent to the city in January 2013 with the second draft of the report and forecasts and a request for feedback and a written response to include in the record. County staff received a letter from the city's Planning Director in January 2013, recommending approval of the forecasts (attached).

general

Fritzie, Martha

From: Fritzie, Martha
Sent: Tuesday, January 22, 2013 1:43 PM
To: 'mbarnett@canby.com'; 'kathywagner@canby.com'; 'brownb@ci.canby.or.us';
'deasm@ci.canby.or.us'; Hoelscher, Scott; 'belliot@cityofestacada.org'; Glasgow, Clay;
'rogge@molalla.net'; 'citymanager@molalla.net'; 'brown@cityofsandy.com';
'slazenby@ci.sandy.or.us'
Cc: McCallister, Mike; Hughes, Jennifer; 'jennifer.donnelly@state.or.us'; Conrad, Larry; Gilevich,
Shari
Subject: Rural Population Coordination - DLCD notice and revised report
Attachments: Notice.sent.01.18.13.pdf

Good afternoon!

I have attached a PDF of the notice that was sent to DLCD last Thursday regarding the rural cities population coordination. Included in this notice is the latest draft of the Background Report and Forecasts (the third bookmark in the document). The numbers in this report should reflect what we each discussed in our meetings over the last month or two. I am considering this report a draft until it is adopted, but I do not expect the numbers/forecasts to change; I do plan to edit it once more and add some information to the appendices. If, for some reason you still have questions about your city's forecast, please get in touch with me as soon as possible so we can resolve it.

The expected hearings schedule to adopt these forecasts is as follows:
Planning Commission: Monday, February 25th @ 6:30PM
Board of County Commissioners: Wednesday, March 20th @9:30AM *note: this is different than the final hearing date on the notice and is not yet confirmed. (I just found out our new commission has changed the day for land use hearings from Thursdays to Wednesdays and I have requested this date.)

To help this run smoothly through the hearings process, it would be a great benefit if each city would provide me with a letter of support that I can add to the record. Any support I could get at the hearings themselves would be a great help as well. Please get all comments/letters to me **no later than February 12th** (any additional questions about the forecasts themselves should to be resolved before this date).

Thank you all for your assistance and your patience throughout this process. Hopefully we have ended up with a good result for everyone. Please do not hesitate to contact me if you have any questions.

Martha

Martha (Nix) Fritzie, Senior Planner
Clackamas County DTD | Planning & Zoning Division
150 Beaver Creek Road | Oregon City, OR 97045
(503) 742-4529
Office hours 8:00am to 6:00pm | Monday - Thursday

Fritzie, Martha

From: Fritzie, Martha
Sent: Wednesday, September 05, 2012 11:10 AM
To: Mike Barnett; 'Bryan Brown'; Matilda Deas; Hoelscher, Scott; Tracy Brown; Glasgow, Clay
Cc: toddc@fcsgroup.com; Conrad, Larry; Gilevich, Shari; McCallister, Mike
Subject: DRAFT Rural Cities Population Report
Attachments: Rural.city.pop.coordinate.DRAFT.8.30.pdf; Rural.city.pop.coordinate.DRAFT.8.30.12.docx; Appendix A.docx

Good morning all,

I have attached a draft for the Rural Cities Population Report for your review. This report includes:

- Background information for context
- A summary of the 2035 Gamma Forecast from Metro
- Recommendations for adjustments to the Metro forecast or identification of discussion areas for each city
- Several requests for additional information from city staff

I have included the entire document in PDF and just the text and Appendix A in Word for you to make changes and comments and/or add information. **Please pay close attention to Appendix A. I would like city staff to provide additional information in that document to give us a better understanding about the unique circumstances in each city that could affect population projections. This information will also be used to help justify any changes requested to the Metro forecast numbers.**

I will be calling each of you in the next week or two to discuss this draft and the projections for your city. In the meantime, feel free to give me a call if you have any questions.

Thank you,
Martha

Martha (Nix) Fritzie, Senior Planner
Clackamas County DTD | Planning & Zoning Division
150 Beaver Creek Road | Oregon City, OR 97045
(503) 742-4529
Office hours 7:00am to 6:00pm | Monday - Thursday

Fritzie, Martha

From: Fritzie, Martha
Sent: Wednesday, July 18, 2012 10:34 AM
To: Mike Barnett; 'Bryan Brown'; Matilda Deas; Hoelscher, Scott; Glasgow, Clay; 'Tracy Brown'
Cc: Gilevich, Shari; Conrad, Larry; Donnelly, Jennifer; McCallister, Mike
Subject: Rural Cities Population Project status update
Attachments: Gamma TAZ Forecast Analysis 2035.pdf

Good morning. I wanted to touch base and give everyone an update on the status of the population coordination project we are working on with your cities. As you know, I have been out of the office for several months. In my absence Shari Gilevich in our office has been diligently working on the background report and incorporating the first round of household projections from Metro (through year 2025). She has completed a draft that will be reviewed internally over the next week or two and then released to all of you for your feedback.

At the same time, Metro has released their first run of the 2025-2035 household and employment projections, which are summarized in the attached document. Please keep in mind that these summaries are by TAZ, *not* city limits or UGB (although most of the growth projected here will occur within the cities' UGBs because of limited opportunities for growth in the rural areas). Feedback for these projections is due to Metro by August 17th.

Moving forward I would anticipate the following happening in the next couple of weeks:

- You will be receiving the draft of the background report to review; and
- I will be setting up a meeting to discuss feedback on the report and the new projections from Metro for 2025-2035. At first glance, there does appear to be a few oddities in the data.

Please to not hesitate to contact me with any questions/comments and I will address them as quickly as possible. It is good to be back, but is definitely taking me a little while to get back up to speed.

Martha

Martha (Nix) Fritzie, Senior Planner
Clackamas County DTD | Planning & Zoning Division
150 Beaver Creek Road | Oregon City, OR 97045
(503) 742-4529
Office hours 7:00am to 6:00pm | Monday - Thursday

Fritzie, Martha

From: Fritzie, Martha
Sent: Tuesday, February 28, 2012 4:42 PM
To: brownb@ci.canby.or.us; tbrown@cityofsandy.com; Hoelscher, Scott; Glasgow, Clay
Cc: McCallister, Mike; Gilevich, Shari
Subject: Rural Cities Population Coordination Kick-off

Good afternoon. Thank you all for agreeing to participate in the county's rural cities population coordination project. We are looking forward to working with all of you. I would like to get this project started by scheduling a kick-off meeting within the next week or two. At this meeting we will discuss the scope of work, timelines and data and/or studies we will need from each of your jurisdictions.

As most of you know, Metro is currently in the process of generating population forecasts for regional transportation planning and has recently begun releasing forecast data and asking local jurisdictions for feedback. As such, we would like to get our population coordination project going as quickly as possible.

Please let me know which of the following dates/times work for you and I will get the kickoff meeting scheduled here in our offices. Please also let me know if there is other staff you feel it would be beneficial to include in this meeting and/or this project. I am working on getting Barlow on board but wanted to get some possible dates out there sooner rather than later.

- Thursday, March 08: afternoon
- Tuesday, March 13: morning (after 10AM)
afternoon
- Wednesday, March 14: morning
afternoon

Thank you. Feel free to give me a call if you have any questions.
Martha

Martha (Nix) Fritzie, Planner
Clackamas County DTD | Planning & Zoning Division
150 Beavercreek Road | Oregon City, OR 97045
(503) 742-4529
Office hours 7:00am to 6:00pm | Monday - Thursday

BARDON

Fritzie, Martha

From: Fritzie, Martha
Sent: Wednesday, February 29, 2012 8:50 AM
To: John A. Rankin
Subject: RE: County-City Population Project

Thank you John.

Martha (Nix) Fritzie, Planner
Clackamas County DTD | Planning & Zoning Division
150 Beaver Creek Road | Oregon City, OR 97045
(503) 742-4529
Office hours 7:00am to 6:00pm | Monday - Thursday

From: John A. Rankin [<mailto:john@johnrankin.com>]
Sent: Wednesday, February 29, 2012 8:48 AM
To: Fritzie, Martha
Cc: Mike Barnett; Kathy Wagner
Subject: RE: County-City Population Project

Hi Martha:

Thanks for the message and email. City Councilor and former Mayor and jack of all trades Mike Barnett is the best contact person for you. I am forwarding this email to him and Kathy Wagner, City Recorder. Mike's contact numbers are 503-266-3579 home and 503-810-0560 cell.

If you have any questions or comments, please email or call me. Thanks. All the best!

John

John A. Rankin, L.L.C.
26715 SW Baker Road
Sherwood, Oregon 97140
Voice: 503-625-9710/Fax: 503-625-9709
Email: john@johnrankin.com

NOTICE: This communication may contain privileged or other confidential information. If you have received it in error, please advise the sender by reply email and immediately delete the message and any attachments without copying or disclosing the contents. Thank you.

From: Fritzie, Martha [<mailto:MFritzie@co.clackamas.or.us>]
Sent: Tuesday, February 28, 2012 1:44 PM
To: john@johnrankin.com
Subject: County-City Population Project

John,

I left you a message earlier today but thought I would try to touch base via email. The Clackamas County Planning & Zoning Division has received a grant from DLCD to complete a coordinated population forecast with our rural cities. I understand that you are involved in planning issues regarding the city of Barlow. I would like to speak with you about who would be most appropriate to ask to participate in this process from Barlow.

As you may know, Metro is currently in the process of generating population forecasts for regional transportation planning and has recently begun releasing forecast data and asking local jurisdictions for feedback. Our intent with the rural cities population project is to utilize that data as a basis for the forecasts for Barlow, Canby, Estacada, Molalla, & Sandy.

Because of Metro's timeframes, we would like to get our population coordination project going as quickly as possible. I am trying to get a kick-off meeting scheduled within the next week or two. Please contact me as soon as possible and let me know if you would be the most appropriate contact person or if I should be working with someone else from the city..

Thank you.
Martha

Martha (Nix) Fritzie, Planner
Clackamas County DTD | Planning & Zoning Division
150 Beaver Creek Road | Oregon City, OR 97045
(503) 742-4529
Office hours 7:00am to 6:00pm | Monday - Thursday

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Canby

Fritzie, Martha

From: Bryan Brown [BrownB@ci.canby.or.us]
Sent: Thursday, February 07, 2013 2:43 PM
To: Fritzie, Martha
Subject: RE: Rural Population Coordination - DLCD notice and revised report
Attachments: Canby Support Letter - Coordinated Population Forecast_2.07.13.pdf

Martha,

The report looks great and attached is a letter which I hope will assist in showing Canby's support for all the great work you did on this project. I think it was well done and it will be great to have an updated official population forecast to utilize. Thanks again. Bryan

Bryan Brown
Planning Director
City of Canby
111 NW 2nd Avenue
Canby, OR 97013
Ph: 503-266-0702
Email: brownb@ci.canby.or.us

PUBLIC RECORDS LAW DISCLOSURE

This email is a public record of the City of Canby and is subject to public disclosure unless exempt from disclosure under Oregon Public Records Law. This email is subject to the State Retention Schedule.

From: Fritzie, Martha [<mailto:M-Fritzie@co.clackamas.or.us>]
Sent: Tuesday, January 22, 2013 1:43 PM
To: mbarnett@canby.com; kathywagner@canby.com; Bryan Brown; Matilda Deas; Hoelscher, Scott; belliott@cityofestacada.org; Glasgow, Clay; rogge@molalla.net; citymanager@molalla.net; thrown@cityofsandy.com; slazenby@ci.sandy.or.us
Cc: McCallister, Mike; Hughes, Jennifer; jennifer.donnelly@state.or.us; Conrad, Larry; Gilevich, Shari
Subject: Rural Population Coordination - DLCD notice and revised report

Good afternoon!

I have attached a PDF of the notice that was sent to DLCD last Thursday regarding the rural cities population coordination. Included in this notice is the latest draft of the Background Report and Forecasts (the third bookmark in the document). The numbers in this report should reflect what we each discussed in our meetings over the last month or two. I am considering this report a draft until it is adopted, but I do not expect the numbers/forecasts to change; I do plan to edit it once more and add some information to the appendices. If, for some reason you still have questions about your city's forecast, please get in touch with me as soon as possible so we can resolve it.

The expected hearings schedule to adopt these forecasts is as follows:

Planning Commission: Monday, February 25th @ 6:30PM

Board of County Commissioners: Wednesday, March 20th @9:30AM *note: this is different than the final hearing date on the notice and is not yet confirmed. (I just found out our new commission has changed the day for land use hearings from Thursdays to Wednesdays and I have requested this date.)

To help this run smoothly through the hearings process, it would be a great benefit if each city would provide me with a letter of support that I can add to the record. Any support I could get at the hearings themselves would be a great help as well. Please get all comments/letters to me **no later than February 12th** (any additional questions about the forecasts themselves should to be resolved before this date).

Thank you all for your assistance and your patience throughout this process. Hopefully we have ended up with a good result for everyone. Please do not hesitate to contact me if you have any questions.

Martha

Martha (Nix) Fritzie, Senior Planner
Clackamas County DTD | Planning & Zoning Division
150 Beavercreek Road | Oregon City, OR 97045
(503) 742-4529
Office hours 8:00am to 6:00pm | Monday - Thursday

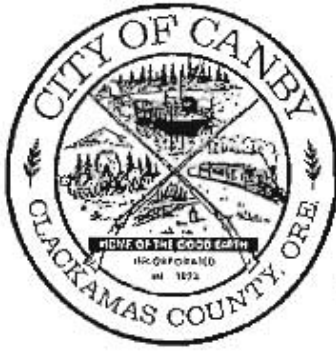
PUBLIC RECORDS LAW DISCLOSURE

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City of Canby

Planning and Development Services

February 7, 2013

Clackamas Board of County Commissioners
2051 Kaen Road
Oregon City, OR 97045

RE: Adoption of 20-year Coordinated Population Forecasts for Rural Cities

Dear County Commissioners:

This letter is intended to express my appreciation on behalf of the City of Canby to Clackamas County and more specifically to senior planner Martha Fritzie and other County planning staff for securing grant funding and their work to complete the Clackamas County Rural Cities Coordinated 20-Year Population Forecast for 2032. The coordinated approach for determining this much needed forecast was appreciated and Canby's participation in the process solicited and our interests well accounted for in the final forecast. The incorporation and extrapolation from Metro's 2035 population forecast provided a well-grounded basis for the coordination work between the rural cities involved.

A continuing strong population growth for Canby is forecasted based on employment opportunities available, primarily expected to be fueled by our Pioneer Industrial Park and the infrastructure investments that have been made and will continue to be made as a result of the Canby Urban Renewal District and Agency actions within the associated urban renewal district.

The City of Canby stands ready to embrace the forecast and plan for needed housing right here in Canby to better accommodate the needs of a growing employment base. Thanks again for the work the County has done to provide this much needed tool for planning Canby's future.

Respectfully,


Bryan Brown
Planning Director

Estacada

Fritzie, Martha

From: Hoelscher, Scott
Sent: Wednesday, October 31, 2012 3:49 PM
To: Fritzie, Martha
Subject: Rural Pop Projection - Estacada

Martha,

I am writing in reference to the *Clackamas County Rural Cities Population Coordination*. I have the following comments regarding the City of Estacada:

- Last year DLCD approved a 130 acre UGB expansion to bring in 130 acres of industrial land. The Estacada City Council recently approved a subdivision for the 130 acres: one 25 acre lot; one 50 acre lot and a bunch of 1 acre lots. All lots are required to be used for industrial purposes.
- The owner/developer of the 130 acre "Industrial Sanctuary" is working with the City on an LID (Local Improvement District) for the development. Construction (road; utilities, etc) may begin in the Spring of 2013! I do not know if Mike Park (owner/developer) has any sale / lease agreements in place for any of the industrial lots.
- The city has approved several large residential subdivisions in the last 7-8 years. The subdivisions are in various stages of approval. As Planner I reviewed several big ones. Let me know if you need more specific information on the residential lots. Also, Denise at the City may have any idea on how many residential lots are available currently.
- Urban Renewal: talk to Bill Elliot (City Manager) about this.

Scott Hoelscher - Planner

Clackamas County Planning & Zoning Division
150 Beaver Creek Road
Oregon City, OR 97045 [Map or Directions](#)
503-742-4524

Office Hours: 7:00 am to 6:00 pm, Monday through Thursday.

Molalla

Fritzie, Martha

From: Fritzie, Martha
Sent: Thursday, February 07, 2013 2:36 PM
To: Fritzie, Martha
Subject: FW: DRAFT Rural Cities Population Report

From: Glasgow, Clay
Sent: Monday, September 10, 2012 2:01 PM
To: Fritzie, Martha
Subject: RE: DRAFT Rural Cities Population Report

Do I get extra credit for reading the entire document?

This methodology, though a little confusing for a planner of little brain such as myself, seems more reasonable than Safe Harbor.

In an effort to make the body count fit the local situation even better, I am happy to supply any pertinent information I have access to. Just not sure what that might be.

The City has a proposed annexation on the ballot in November. This to allow expansion of an existing apartment development by about 65 units. That could potentially add bodies not included in the estimates. Is that pertinent?

Sanitary sewer capacity appears to exceed the Metro numbers.

I have had brief discussions with the Big Meadow subdivision developer about a possible UGB expansion of (far too) many acres adjacent to the NW corner of town. He hopes to be able to build 100 or so new houses.

Info included with the application for "Vest" (denied at LUBA) shows an almost unbelievably low vacancy rate for multi-family. If accurate the information could be used in future proposals for annexation/zone change/UGB expansions.

The TEAM group (economic development for Molalla) is active and seemingly busy. While their focus is on commercial and industrial development obviously any success they have could also affect population numbers in the city and surrounding area. Does that kind of info count?

Though I may need a little direction, I am happy to help as I can.

From: Fritzie, Martha
Sent: Wednesday, September 05, 2012 11:10 AM
To: Mike Barnett; 'Bryan Brown'; Matilda Deas; Hoelscher, Scott; Tracy Brown; Glasgow, Clay
Cc: toddc@fcsgroup.com; Conrad, Larry; Gilevich, Shari; McCallister, Mike
Subject: DRAFT Rural Cities Population Report

Good morning all,

I have attached a draft for the Rural Cities Population Report for your review. This report includes:

- Background information for context
- A summary of the 2035 Gamma Forecast from Metro
- Recommendations for adjustments to the Metro forecast or identification of discussion areas for each city
- Several requests for additional information from city staff

I have included the entire document in PDF and just the text and Appendix A in Word for you to make changes and comments and/or add information. **Please pay close attention to Appendix A. I would like city staff to provide additional information in that document to give us a better understanding about the unique circumstances in each city that could affect population projections. This information will also be used to help justify any changes requested to the Metro forecast numbers.**

I will be calling each of you in the next week or two to discuss this draft and the projections for your city. In the meantime, feel free to give me a call if you have any questions.

Thank you,
Martha

Martha (Nix) Fritzie, Senior Planner
Clackamas County DTD | Planning & Zoning Division
150 Beaver Creek Road | Oregon City, OR 97045
(503) 742-4529
Office hours 7:00am to 6:00pm | Monday - Thursday

Fritzie, Martha

From: Fritzie, Martha
Sent: Thursday, January 10, 2013 5:27 PM
To: 'rogge@molalla.net'; 'citymanager@molalla.net'
Subject: 2035 revised population forecast (Molalla)
Attachments: City Molalla.pdf

Hi Deborah & Mark. I have attached a table with a few minor adjustments to the previously-sent revisions to the 2035 population forecast for the city of Molalla, per our earlier conversations and meeting. I was not able to adjust much more than I had without it potentially causing problems in other nearby areas.

I am close to finalizing the population report and getting notice out next week for the public hearings that will need to happen for these forecasts to be adopted. Please take a look at the new numbers and let me know as soon as possible if you have any comments or questions.

Also, I believe Mark was going to look into the capacity of the water plant (we thought it was around 14,000 population). Could I get a verification of that number?

Thank you. I will send the entire report and hearing notices when they are complete.

Martha

Martha (Nix) Fritzie, Senior Planner
Clackamas County DTD | Planning & Zoning Division
150 Beaver Creek Road | Oregon City, OR 97045
(503) 742-4529
Office hours 8:00am to 6:00pm | Monday - Thursday

Fritzie, Martha

From: Fritzie, Martha
Sent: Wednesday, December 19, 2012 10:47 AM
To: 'rogge@molalla.net'; 'citymanager@molalla.net'
Subject: Draft background report and population forecasts
Attachments: Rural.city.pop.coordinate.DRAFT.8.30.pdf; Appendix A.docx; Molalla revisions.xlsx

Deborah & Mark,

Thank you for taking the time to meet with me yesterday. I hope this project will continue to go smoothly and get you to a point where you can adopt the update of your Comprehensive Plan soon.

I have attached the entire draft report in PDF for you to print and read, as well as Appendix A in a Word document so you can add anything you feel is pertinent. The proposed revisions to the forecast are in the attached table. I will continue to work on amendments based on our conversation yesterday, including possibly a little more adjustment to the forecast numbers. Please send me any additional comments/feedback by January 4th.

Specific information that I am needing includes:

1. The estimated capacity of your water plant (i.e. verify that the plant will max out at approximately 14,000 people).
2. Any information about approved or planned residential development (besides the new apartment complex we discussed).
3. Any other information that you think would be useful in justifying and increased forecast.

After today, I will be out of the office for vacation until Dec. 31st but will be happy to answer any questions you have upon my return.

Thanks again and enjoy your holiday,
Martha

Martha (Nix) Fritzie, Senior Planner
Clackamas County DTD | Planning & Zoning Division
150 Beaver Creek Road | Oregon City, OR 97045
(503) 742-4529
Office hours 8:00am to 6:00pm | Monday - Thursday

City of Molalla
117 N. Molalla Ave., Molalla, OR 97038

EXHIBIT 5
200242
02/20/13



February 20, 2013

Martha Fritzie, Senior Planner
Clackamas County Planning and Zoning
150 Beaver Creek Road
Oregon City, OR 97015

Dear Ms. Fritzie,

The City of Molalla accepts the 2035 revised average annual population forecast you presented to us of two (2%).

Sincerely,

A handwritten signature in cursive script, appearing to read "Mark Gervasi".

Mark Gervasi
Interim City Manager
(503) 829-6855 X 224

 SANDY

Fritzie, Martha

From: Scott Lazenby [slazenby@ci.sandy.or.us]
Sent: Tuesday, July 31, 2012 11:35 AM
To: Fritzie, Martha
Cc: Conrad, Larry; Tracy Brown
Subject: Re: Feedback on "gamma" forecast
Attachments: Population trends.pdf

Martha,
See answers to your questions, below.
--Scott



Scott Lazenby, City Manager
City of Sandy
39250 Pioneer Blvd., Sandy, OR 97055
(503) 668-6927
slazenby@ci.sandy.or.us

On Mon, Jul 30, 2012 at 3:42 PM, Fritzie, Martha <MFritzie@co.clackamas.or.us> wrote:

Scott – Larry forwarded your email to me. I am currently working with him on the TSP but also working on using Metro's numbers to create a coordinated population forecast, per ORS 195.036.

I am about a week or so from completing a draft of a background report and initial forecast numbers for the rural unincorporated portion of the county and its rural cities. I would agree with you that the growth rate proposed by Metro may be a little low given historic growth and we can probably request a change. A couple things to consider – and perhaps you could address the following for me:

1. I believe the city has sufficient buildable residential land to accommodate the projected growth and more (and could, of course, expand the UGB). Does the city also have the infrastructure (sewer, water, etc.) available, planned, or the capacity to expand to accommodate continued growth at high rates? Yes.
2. Is there any economic activity in the foreseeable future that would possibly affect the population growth (i.e. planned development in a large jobs-producing industry or alternatively the loss of a large employer)? Sandy's economy is very diversified. Residents of Sandy also work in other parts of the region (both west and east of Sandy). Economic activity in the region as a whole will affect Sandy's population growth.
3. Is there anything else that you are aware of happening in the city that would affect population growth either positively or negatively? Positive – municipal ISP (SandyNet) that will provide inexpensive fiber Internet service to all homes and businesses. Fareless bus connections to MAX and Tri Met system. Relatively inexpensive land. New \$100 million state-of-the-art high school. Negative – limited highway connections to Interstate freeway system.

4. What, to your knowledge, has been driving the rapid population growth? Growth in state and regional population in general. Sandy has offered good access to outdoor recreation as well as to the more urban amenities in the metro area.

5. What rate of continued growth do you think is (1) realistic and (2) sustainable for the city, recognizing that as the city gets larger the growth rate would decrease even if the city were growing by the same number of people each year? Continuation of the 4.3% historical rate seems reasonable, until the urban reserve is built out (at around 30k population). That rate is consistent with the assumptions of the Sandy 2040 plan (done in cooperation with Metro in the mid 1990s). The attached chart compares this rate with Gresham's historical growth rate (Gresham's population in 1950 matched Sandy's population in 1980, so the number for Gresham in 2040 is their 2010 census number), as well as Sherwood's actual population numbers. As a personal note, I would question whether any further growth in Oregon (or world, for that matter) human population is really sustainable; if Clackamas County or Metro have found a legal way to freeze or reverse regional population growth, let me know.

Thank you. Any information we can use in addition to the historic growth rates will be helpful in requesting a change and for including in the coordinated population forecast.

Feel free to contact me directly with any comments/questions.

Martha

Martha (Nix) Fritzie, Senior Planner

Clackamas County DTD | Planning & Zoning Division

150 Beaver Creek Road | Oregon City, OR 97045

[\(503\) 742-4529](tel:5037424529)

Office hours 7:00am to 6:00pm | Monday - Thursday

From: Conrad, Larry
Sent: Tuesday, July 24, 2012 4:07 AM
To: Fritzie, Martha
Subject: Fwd: Feedback on "gamma" forecast

Larry -

Sent from my iPhone

Begin forwarded message:

From: Scott Lazenby <slazenby@ci.sandy.or.us>
Date: July 23, 2012 8:26:28 PM EDT
To: "Conrad, Larry" <LarryC@co.clackamas.or.us>
Cc: "dennis.yee@oregonmetro.gov" <dennis.yee@oregonmetro.gov>, Tracy Brown <tbrown@ci.sandy.or.us>
Subject: Feedback on "gamma" forecast

Larry,

You've asked for feedback on the "Gamma TAZ" forecast. The projection for households in Sandy seems to be 1.7% per year, on average, to 2035. But our population has grown by an annual average of 4.3% over the past two decades, and it has grown, on average, by that same rate *since 1940*. It's hard to see why our growth rate would suddenly plummet. Household growth isn't necessarily proportional to population growth, but the average household size would need to double (to five people per household!) for the "gamma" projection to match our historical population growth rate.

Here are the raw (census) data:

Year	Population	Annual Growth Rate
1940	473	
1950	1003	7.8%
1960	1147	1.4%
1970	1544	3.0%
1980	2905	6.5%
1990	4152	3.6%
2000	5385	2.6%
2010	9655	6.0%
Past 20 years		4.3%
Past 70 years		4.4%

--Scott

Scott Lazenby, City Manager

City of Sandy
39250 Pioneer Blvd., Sandy, OR 97055
(503) 668-6927
slazenby@ci.sandy.or.us

Spam

Not spam

Forget previous vote

Fritzie, Martha

From: Tracy Brown [tbrown@ci.sandy.or.us]
Sent: Monday, January 14, 2013 4:58 PM
To: Fritzie, Martha
Subject: Re: 2035 revised population forecast (Sandy)

Martha, this seems fine to use. Thanks, Tracy

On Thu, Jan 10, 2013 at 5:18 PM, Fritzie, Martha <MFritzie@co.clackamas.or.us> wrote:

Hi. I have attached a table with some additional revisions to the 2035 population forecast for the city of Sandy, per our earlier conversations and meeting. I am close to finalizing the population report and getting notice out for the public hearings that will need to happen for these forecasts to be adopted. Please take a look at the new numbers and let me know as soon as possible if you have any comments or questions.

Thank you. I will send the entire report and hearing notices when they are complete and expect the first hearing to be at the end of February.

Martha

Martha (Nix) Fritzie, Senior Planner
Clackamas County DTD | Planning & Zoning Division
150 Beavercreek Road | Oregon City, OR 97045
(503) 742-4529
Office hours 8:00am to 6:00pm | Monday - Thursday

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Tracy A. Brown
City of Sandy
Director of Planning & Development
39250 Pioneer Blvd.

Sandy, OR 97055
Ph. 503-668-4886
Fax 503-668-8714
tbrown@cityofsandy.com
www.cityofsandy.com

[Spam](#)

[Not spam](#)

[Forget previous vote](#)

Fritzie, Martha

From: Tracy Brown [tbrown@ci.sandy.or.us]
Sent: Tuesday, January 29, 2013 4:17 PM
To: Fritzie, Martha
Subject: Fwd: Scanned letter Clackamas Co Planning comm
Attachments: Ltr Clackamas Co Planning Comm 1-30-13.pdf

Martha, please find a letter regarding the proposed population projections. Thanks, Tracy

----- Forwarded message -----

From: **Fran Berteau** <fberteau@ci.sandy.or.us>
Date: Tue, Jan 29, 2013 at 4:05 PM
Subject: Scanned letter Clackamas Co Planning comm
To: Tracy Brown <tbrown@ci.sandy.or.us>

--

Fran Berteau
Planning Assistant
City of Sandy
39250 Pioneer Blvd.
Sandy, OR 97055
fberteau@ci.sandy.or.us
Tel [503-489-2160](tel:503-489-2160)
Fax [503-668-8714](tel:503-668-8714)

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Tracy A. Brown
City of Sandy
Director of Planning & Development
39250 Pioneer Blvd.
Sandy, OR 97055
Ph. 503-668-4886
Fax 503-668-8714
tbrown@cityofsandy.com
www.cityofsandy.com

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January 30, 2013

Clackamas County Planning Commission
150 Beaver Creek Rd.
Oregon City, OR 97045

RE: File No. ZDO-242 (Coordinated Population Forecasts)

Please enter this letter into the record regarding the proposed Comprehensive Plan Text Amendment: Coordinated Population Forecasts. The current review draft identifies a 2.8 percent annual growth rate for the city of Sandy which is well below our historical growth rate of 4.3 percent over the last several decades. Despite this difference we are supportive of the proposed number and urge adoption of the recommendation as presented.

The city of Sandy is very appreciative of staff's work on this project and the final product will greatly assist in our future long range planning efforts.

Please do not hesitate contacting me at 503-668-4886 or tbrown@cityofsandy.com if you have any questions.

Sincerely,

A handwritten signature in black ink that reads "Tracy Brown".

Tracy Brown
Planning Director
503-668-4886

Phone 503-668-5533 • Fax 503-668-8714

39250 Pioneer Boulevard • Sandy, OR 97055 • www.cityofsandy.com

The City of Sandy is an equal opportunity employer and does not discriminate on the basis of race, religion, sex or disability.

APPENDIX C SUMMARY OF METRO FORECASTING METHODOLOGY

Population Forecasting and the TSP Update

July 2012

FACT: Clackamas County, along with all Oregon cities and counties that create transportation system plans, is required to use a coordinated population forecast for its' planning. Because part of Clackamas County is inside the Metro Boundary, the County has two options for what population and employment forecast data is used:

1. Use the population and employment forecasts that Metro uses in the Regional Transportation Plan (RTP), **or**
2. Develop an alternative forecast, coordinated with Metro, to account for changes to comprehensive plans or land use regulations that were adopted locally after the RTP was adopted by Metro.

BACKGROUND: The State of Oregon has required that land use and transportation plans be based on a coordinated population forecast since the mid 1970's. Coordinated population forecasts are the responsibility of counties (ORS 195.036) with the exception of the area within the Metro urban growth boundary (UGB).

- The area of Clackamas County inside the Metro urban growth boundary is included in Metro's forecast that is used for state land use and transportation planning.
- Clackamas County has not conducted a separate coordinated population forecast for the area outside the Metro boundary for more than two decades. The County is currently working with rural cities to develop a coordinated forecast in conjunction with the update of the Metro forecast.
- Metro, a Metropolitan Planning Organization (MPO), is also responsible for population and employment forecasting for use in regional transportation planning (federal) in the Portland-Beaverton-Vancouver Oregon-Washington Primary Metropolitan Statistical Area (PMSA). This PMSA consists of seven counties – Clackamas, Washington, Multnomah, Yamhill and Columbia in Oregon, and Clark and Skamania in Washington. This forecast, which is updated every five years, covers all of Clackamas County.

The current Clackamas County TSP Update process must be consistent with Metro's current household and employment forecast through 2035. (The population forecast is developed from the household forecast.) This forecast (see below) is expected to be adopted by Metro by the end of 2012 and then forwarded to the State Land Conservation and Development Commission for review.

Most Recent Metro Forecast	2010 Households	2035 Households	2010 – 2035 Change	2010 Employment	2035 Employment	2010 – 2035 Change
Clackamas County	146,324	205,369	59,045	137,946	210,340	72,394
Multnomah County	304,649	442,778	138,129	419,164	597,532	178,368
Washington County	202,647	294,174	93,527	232,019	382,310	150,291
Clark County	158,110	228,392	70,282	127,267	222,029	94,762

APPENDIX C SUMMARY OF METRO FORECASTING METHODOLOGY

TOTAL	811,730	1,170,713	358,983	916,396	1,412,211	495,815
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Metro Household and Employment Forecast Model Components

(For more information on the components reviewed below, go to:

[http://www.oregonmetro.gov/index.cfm/go/by.web/id=39026.](http://www.oregonmetro.gov/index.cfm/go/by.web/id=39026))

1. The Metro Regional Population Forecast uses a standard population cohort survival methodology. This methodology estimates future populations using basic demographic data broken down into *cohorts* – age and gender specific groups. The forecasts use the size of each age group in the base year population, and the expected deaths rates and expected migration for each age cohort during the forecast period, plus the estimated number of new births, to estimate the future population.

- The mortality rates are age-specific, based on the U.S. Census middle series assumptions and further calibrated to base year vital statistics for the region as a whole.
- New birth cohorts are generated by applying age-specific fertility assumptions to the female population of child-bearing age (assumed to be 10 to 49 years old), based on the U.S. Census middle series assumptions and further calibrated to base year vital statistics for the region as a whole.
- Net migration is projected from an econometric equation and disaggregated into age groups based on census distributions.

2. The Metro Regional Employment Forecast is based on an econometric forecasting model that describes regional economic behavior. It includes equations for employment sectors, wage sectors, income components, population and migration, productivity, inter-industry demand variables and a number of identity equations.

3. The Regional Land Supply Model is a recently-updated GIS-based model that estimates the available land supply for residential and employment land uses at the parcel level for the Portland Region.

4. The Metroscope Model allocates the forecast household and employment growth to the available land supply in the region.

- It uses output from the **Regional Travel Demand Model** (see below) in the allocation process.
- It uses two internal real estate location models, one for residential location and one for nonresidential location, that
 - predict the locations of households and employment respectively,
 - measure the amount of land consumed by development,
 - measure the amount of built space produced, and
 - measure the prices of land and built space by zone in each forecast time period.

5. The Regional Travel Demand Model:

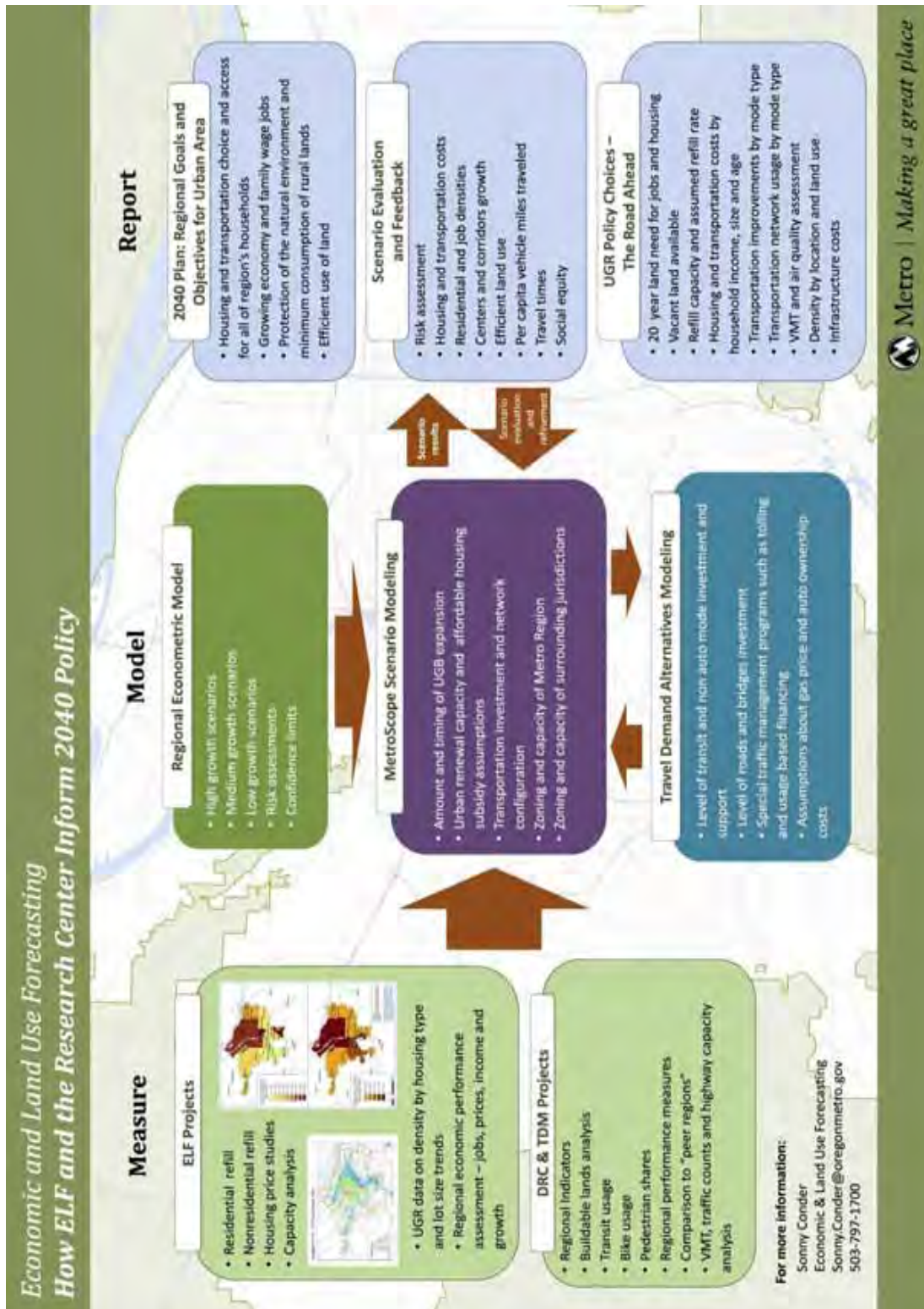
- Predicts travel activity levels by mode (bus, rail, car, walk or bike) and road segment;
- Estimates travel times between transportation analysis zones (TAZs) by time of day, and
- Produces a measure of the cost perceived by travelers in getting from any one TAZ to any other.

APPENDIX C

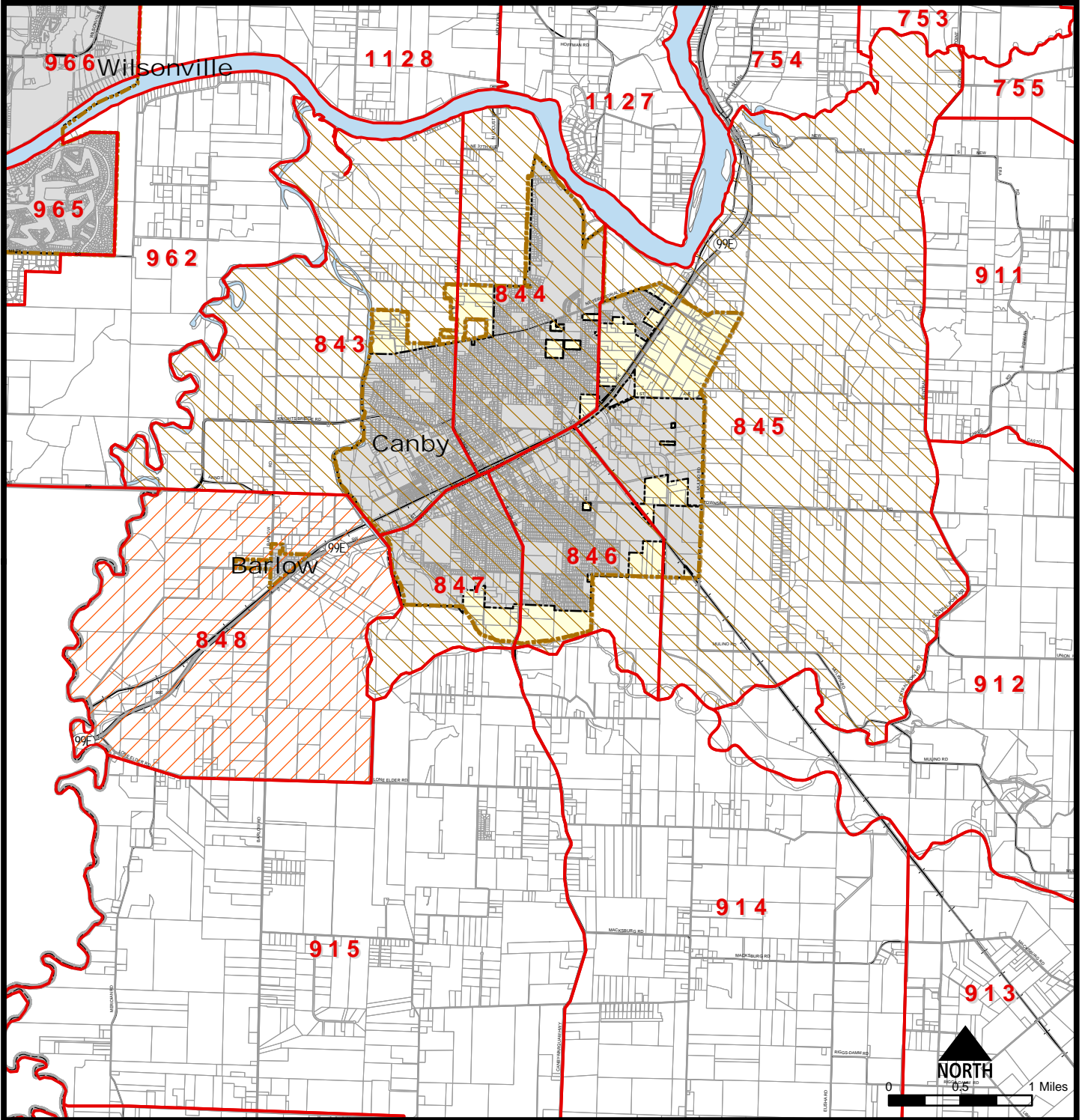
SUMMARY OF METRO FORECASTING METHODOLOGY

Metro Economic and Land Use Forecasting (see graphic, below)

The following graphic shows the relationship between the various measures, models and reports used by Metro for economic and land use forecasting. The forecasting is done by the Metro Research Center that is made up of three divisions: Data Resource Center, Transportation Research and Modeling Services, and Economic and Land Use Forecasting (ELF).








APPENDIX D: MAPS OF TAZ GROUPS & CITY BOUNDARIES



City, Urban Growth Boundary (UGB) and Transportation Area Zone (TAZ) Boundaries

CITIES OF CANBY & BARLOW

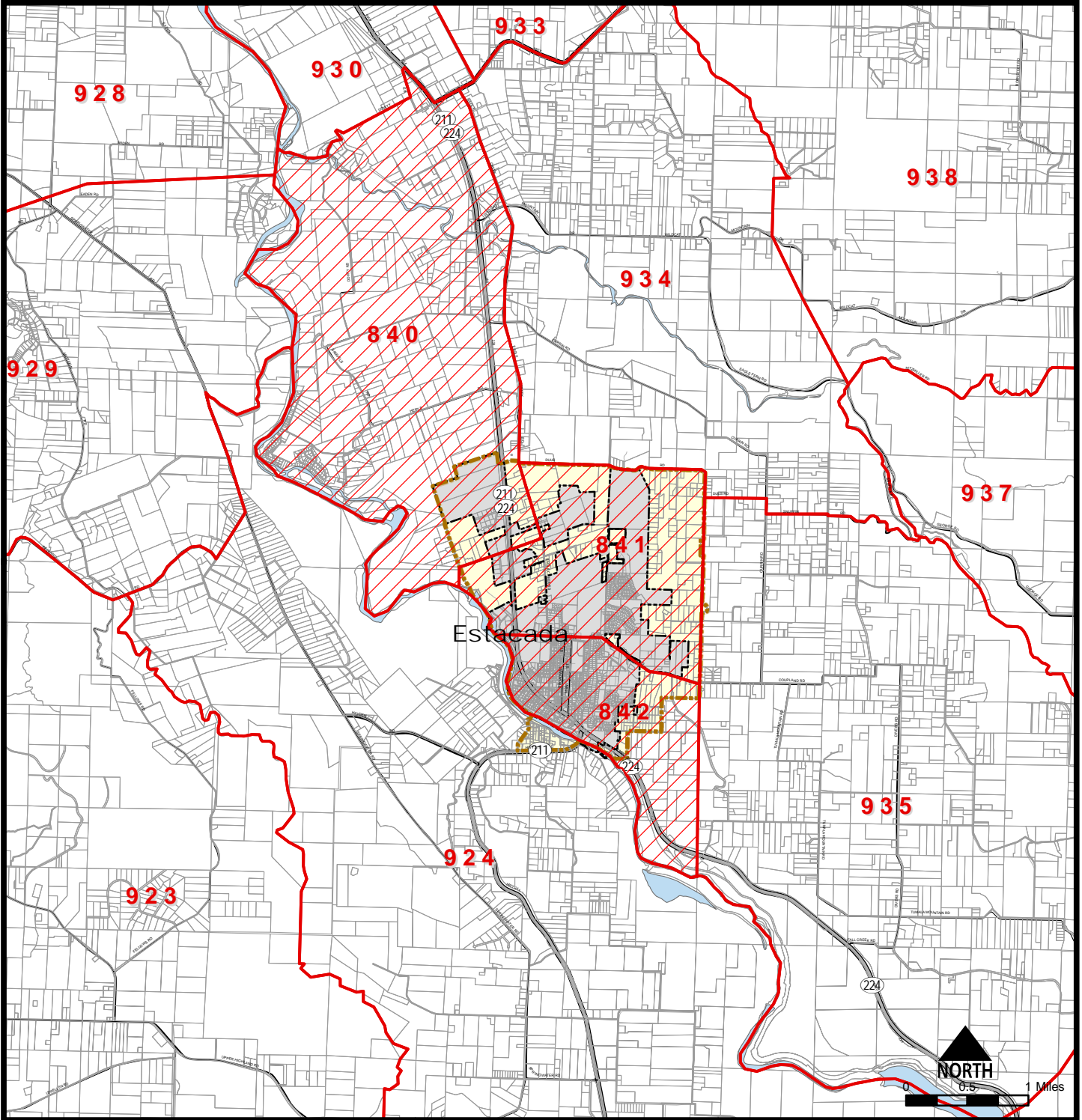
November 2012

- | | | | |
|---|------------------------------------|---|------------------|
|  | Incorporated City Limits |  | Canby TAZ group |
|  | Urban Growth Boundary (UGB) |  | Barlow TAZ group |
|  | Transportation Analysis Zone (TAZ) | | |



Department of Transportation & Development
150 Beaver Creek Rd. Oregon City, OR 97045





APPENDIX D: MAPS OF TAZ GROUPS & CITY BOUNDARIES



City, Urban Growth Boundary (UGB) and Transportation Area Zone (TAZ) Boundaries

CITY OF ESTACADA

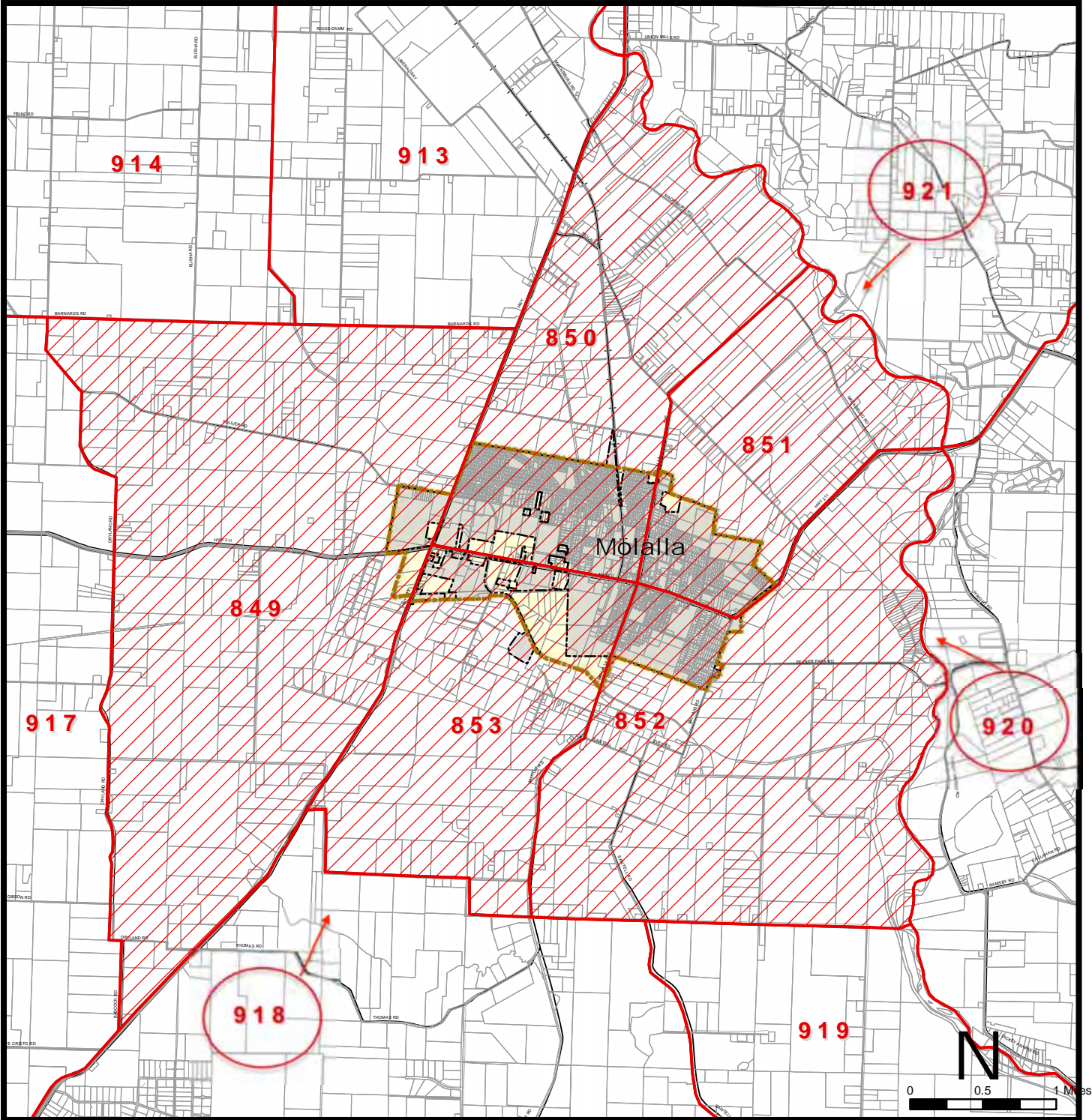
November 2012

-  Incorporated City Limits
 -  Urban Growth Boundary (UGB)
 -  Transportation Analysis Zone (TAZ)
-  Estacada TAZ group



Department of Transportation & Development
150 Beaver Creek Rd. Oregon City, OR 97045





APPENDIX D: MAPS OF TAZ GROUPS & CITY BOUNDARIES



City, Urban Growth Boundary (UGB) and Transportation Area Zone (TAZ) Boundaries

CITY OF MOLALLA

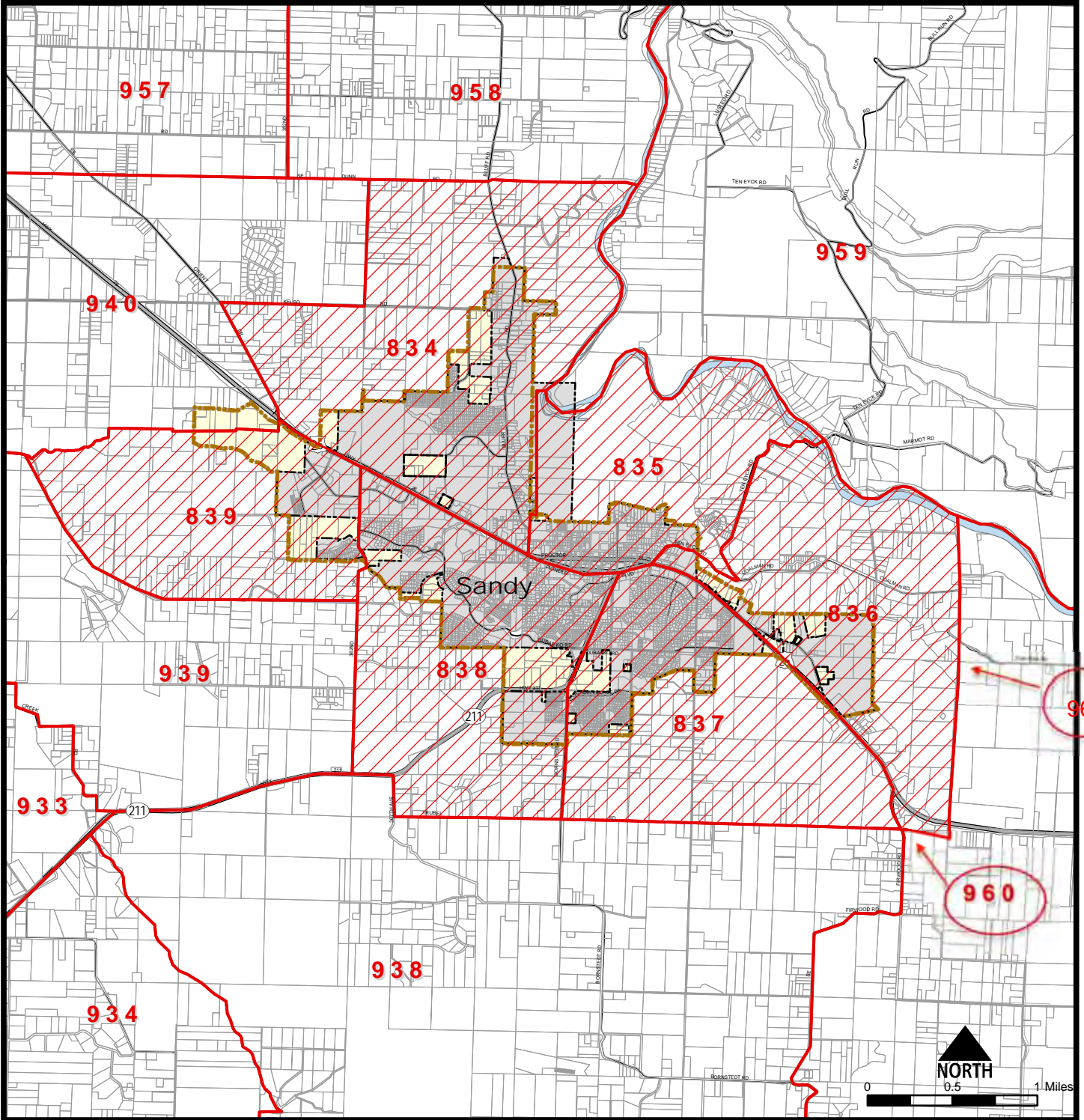
February 2013

-  Incorporated City Limits
 -  Urban Growth Boundary (UGB)
 -  Transportation Analysis Zone (TAZ)
-  Molalla TAZ group



Department of Transportation & Development
150 Beavercreek Rd. Oregon City, OR 97045




APPENDIX D: MAPS OF TAZ GROUPS & CITY BOUNDARIES



City, Urban Growth Boundary (UGB) and Transportation Area Zone (TAZ) Boundaries

CITY OF SANDY

November 2012

-  Incorporated City Limits
-  Urban Growth Boundary (UGB)
-  Transportation Analysis Zone (TAZ)

-  Sandy TAZ group



Department of Transportation & Development
150 Beaver Creek Rd. Oregon City, OR 97045

**APPENDIX E:
SUPPORTING DATA AND ADDITIONAL DEMOGRAPHIC TABLES**

2010 Population and Housing Characteristics for Oregon, Clackamas County and the Rural Area Cities							
	Oregon	Clackamas County	Barlow	Canby	Estacada	Molalla	Sandy
TOTAL POPULATION	3,831,074	375,992	135	15,829	2,695	8,108	9,570
HOUSING							
Total	1,675,562	156,945	45	5,890	1,155	3,017	3,768
Occupied	1,518,938	145,790	44	5,647	1,062	2,857	3,567
Owner-occupied	944,485	100,982	41	3,765	640	1,896	2,271
Population in owner-occupied	2,386,743	268,718	127	10,408	1,746	5,418	6,176
Renter occupied	574,453	44,808	3	1,882	422	961	1,296
Population in renter occupied	1,357,689	104,521	8	5,327	940	2,637	3,380
Persons/Occupied Housing Unit	2.465	2.560	3.068	2.786	2.529	2.819	2.679
Households w/ individual under 18	456,775	47,821	16	2,233	373	1,281	1,448
Vacant	156,624	11,155	1	243	93	160	201
Vacant for rent	40,193	2,800	-	84	48	47	63
Vacant for sale	24,191	2,097	-	66	21	67	71
POPULATION							
Male	1,896,002	184,925	66	7,596	1,343	4,002	4,678
Female	1,935,072	191,067	69	8,233	1,352	4,106	4,892
Under 18	866,453	89,231	40	4,484	722	2,491	2,779
18 & over	2,964,621	286,761	95	11,345	1,973	5,617	6,791
20-24	253,048	19,774	5	794	165	466	566
25-34	524,144	42,801	13	1,924	366	1,361	1,522
35-49	762,404	79,153	32	3,236	553	1,687	1,948
50-64	785,762	84,628	22	2,692	481	1,091	1,505
65 & over	533,533	51,231	17	2,247	347	797	977
ETHNICITY							
Hispanic or Latino	450,062	29,138	20	3,368	203	1,173	884
Non Hispanic or Latino	3,381,012	346,854	115	12,461	2,492	6,935	8,686
POPULATION BY RACE							
White	3,204,614	331,571	109	12,816	2,479	7,045	8,616
African American	69,206	3,082	1	93	21	49	40
Asian	141,263	13,729	-	169	31	66	118
American Indian and Alaska Native	53,203	3,122	1	192	20	85	124
Native Hawaiian & Pacific Islander	13,404	867	-	29	6	21	19
Other	204,625	11,756	19	2,072	74	605	327
Identified by two or more	144,759	11,865	5	458	64	237	326

Source: Portland State's Population Research Center (www.pdx.edu/prc)

APPENDIX E: SUPPORTING DATA AND ADDITIONAL DEMOGRAPHIC TABLES

2010 Population for Oregon, Clackamas County and the Rural Area Cities By Sex and Age														
	Oregon		Clackamas County		Barlow		Canby		Estacada		Molalla		Sandy	
	Population	Percent of State Population	Population	Percent of County Population	Population	Percent of City Population	Population	Percent of City Population	Population	Percent of City Population	Population	Percent of City Population	Population	Percent of City Population
TOTAL POPULATION	3,831,074		375,992		135		15,829		2,695		8,108		9,570	
POPULATION														
Male	1,896,002	49.5%	184,925	49.2%	66	48.9%	7,596	48.0%	1,343	49.8%	4,002	49.4%	4,678	48.9%
Female	1,935,072	50.5%	191,067	50.8%	69	51.1%	8,233	52.0%	1,352	50.2%	4,106	50.6%	4,892	51.1%
Under 18	866,453	22.6%	89,231	23.7%	40	29.6%	4,484	28.3%	722	26.8%	2,491	30.7%	2,779	29.0%
18 & over	2,964,621	77.4%	286,761	76.3%	95	70.4%	11,345	71.7%	1,973	73.2%	5,617	69.3%	6,791	71.0%
20-24	253,048	6.6%	19,774	5.3%	5	3.7%	794	5.0%	165	6.1%	466	5.7%	566	5.9%
25-34	524,144	13.7%	42,801	11.4%	13	9.6%	1,924	12.2%	366	13.6%	1,361	16.8%	1,522	15.9%
35-49	762,404	19.9%	79,153	21.1%	32	23.7%	3,236	20.4%	553	20.5%	1,687	20.8%	1,948	20.4%
50-64	785,762	20.5%	84,628	22.5%	22	16.3%	2,692	17.0%	481	17.8%	1,091	13.5%	1,505	15.7%
65 & over	533,533	13.9%	51,231	13.6%	17	12.6%	2,247	14.2%	347	12.9%	797	9.8%	977	10.2%

Source: US Census, Portland State's Population Research Center (www.pdx.edu/prc)

Clackamas County is one of seven counties in the Portland-Vancouver-Hillsboro Metropolitan Statistical Area (MSA), which had a 2010 population of 2,225,379 persons.

Table. 2010 Population of Counties in the Portland-Vancouver-Hillsboro OR-WA Metropolitan Statistical Area

County in Metropolitan Statistical Area	Population (2010 Census)	% of population of total MSA	% Population Increase from 2000
Multnomah County, OR	735,334	33.0%	11.3%
Washington County, OR	529,710	23.8%	18.9%
Clark County, WA	424,733	19.1%	23%
Clackamas County, OR	375,992	16.9%	11.1%
Yamhill County, OR	99,193	4.5%	16.7%
Columbia County, OR	49,351	2.2%	13.3%
Skamania County, WA	11,066	0.5%	12.1%
TOTAL POPULATION	2,225,379		

Source: US Census

The following prepared by Population Research Center, PSU, March 2012:

Table. Population Estimate of Oregon by Area Type and MSA: 2000 to 2011

Date	State	Incorporated	Un-incorporated	Metropolitan	Non-metropolitan
April 1, 2000	3,421,399	2,277,618	1,143,781	2,617,755	803,644
April 1, 2010	3,831,074	2,669,922	1,161,152	2,978,551	852,523
July 1, 2010rev	3,837,300	2,673,122	1,164,178	2,983,855	853,445
July 1, 2011	3,857,625	2,684,812	1,172,813	3,002,340	855,285

Source: Portland State's Population Research Center (www.pdx.edu/prc)

**APPENDIX E:
SUPPORTING DATA AND ADDITIONAL DEMOGRAPHIC TABLES**

Date	Portland-Vancouver-Beaverton MSA Total Population
April 1, 2000	1,927,881
April 1, 2010	2,226,009
July 1, 2010rev	2,230,578
July 1, 2011	2,246,083

Source: Portland State's Population Research Center (www.pdx.edu/prc)

	Percent of all MSA	Percent of Oregon portion of MSA
Clackamas	16.9%	21.0%
Columbia	2.2%	2.7%
Multnomah	33.0%	41.1%
Washington	23.9%	29.7%
Yamhill	4.4%	5.5%
Oregon State Counties	80.4%	
Washington State Counties	19.6%	

Source: Portland State's Population Research Center (www.pdx.edu/prc)

Table. Components of Population Change for Oregon's Counties: April 1, 2010 to July 1, 2011

	July 1, 2011 Population Estimate	April 1, 2010 Census Population	Population Change 2010-11	Percent Change 2010-11	Average Annual Change since Census	Births 2010-11	Deaths 2010-11	Natural Increase 2010-11	Net Migration 2010-11
OREGON	3,857,625	3,831,074	26,551	0.7%	0.6%	56,846	39,693	17,153	9,398
<u>Counties</u>									
Clackamas	378,480	375,992	2,488	0.7%	0.5%	4,800	3,747	1,053	1,435
Columbia	49,625	49,351	274	0.6%	0.4%	575	437	138	136
Multnomah	741,925	735,334	6,591	0.9%	0.7%	12,088	6,599	5,489	1,102
Washington	536,370	529,710	6,660	1.3%	1.0%	8,916	3,512	5,404	1,256
Yamhill	99,850	99,193	657	0.7%	0.5%	1,433	1,034	399	258
	1,806,250	1,789,580	16,670	0.93%		27,812	15,330	12,482	4,188
WASHINGTON									
<u>Counties</u>									
Clark and Skamania	439,833								
Portland- Vancouver OR-WA MSA	2,246,083								

Source: Portland State's Population Research Center (www.pdx.edu/prc)

APPENDIX E: SUPPORTING DATA AND ADDITIONAL DEMOGRAPHIC TABLES

Forecasts of Oregon's County Populations and Components of Change, 2000 – 2040 Release: April 2004, OEA

Total Population

Note: populations as of July 1

Base population of July 1, 2000: Totals estimated by PRC, PSU and age-sex details estimated by OEA based on Census Bureau's distributions.

Oregon's age-sex detail may not match with the short-term forecast released in the OEA's Economic and Revenue Forecast

Prepared by Office of Economic Analysis, Department of Administrative Services, State of Oregon

<u>Area Name</u>	<u>FORECAST</u>								
	<u>2000</u>	<u>2005</u>	<u>2010</u>	<u>2015</u>	<u>2020</u>	<u>2025</u>	<u>2030</u>	<u>2035</u>	<u>2040</u>
Oregon	3,436,750	3,618,200	3,843,900	4,095,708	4,359,258	4,626,015	4,891,225	5,154,793	5,425,408
Clackamas	340,000	363,240	391,536	424,648	460,323	497,926	536,123	576,231	620,703

Population Change

<u>Area Name</u>	<u>Estimate</u>	<u>FORECAST</u>							
	<u>2000-2003</u>	<u>2000-2005</u>	<u>2005-2010</u>	<u>2010-2015</u>	<u>2015-2020</u>	<u>2020-2025</u>	<u>2025-2030</u>	<u>2030-2035</u>	<u>2035-2040</u>
Oregon	104,750	181,450	225,700	251,808	263,550	266,757	265,210	263,568	270,615
Clackamas	13,450	23,240	28,296	33,112	35,675	37,603	38,198	40,108	44,472

Annual Growth Rate

<u>Area Name</u>	<u>Estimate</u>	<u>FORECAST</u>							
	<u>2000-2003</u>	<u>2000-2005</u>	<u>2005-2010</u>	<u>2010-2015</u>	<u>2015-2020</u>	<u>2020-2025</u>	<u>2025-2030</u>	<u>2030-2035</u>	<u>2035-2040</u>
Oregon	1.00%	1.03%	1.21%	1.27%	1.25%	1.19%	1.11%	1.05%	1.02%
Clackamas	1.29%	1.32%	1.50%	1.62%	1.61%	1.57%	1.48%	1.44%	1.49%

Number of Births

Estimates for 2000-2003 are based on PRC, PSU's estimates and data from Oregon Center for Health Statistics, DHS.

<u>Area Name</u>	<u>Estimate</u>	<u>FORECAST</u>							
	<u>2000-2003</u>	<u>2000-2005</u>	<u>2005-2010</u>	<u>2010-2015</u>	<u>2015-2020</u>	<u>2020-2025</u>	<u>2025-2030</u>	<u>2030-2035</u>	<u>2035-2040</u>
Oregon	136,195	228,476	241,150	256,797	268,922	277,316	286,563	299,071	314,992
Clackamas	12,297	20,738	23,153	26,528	29,092	30,438	31,431	33,281	36,380

Number of Deaths

Estimates for 2000-2003 are based on PRC, PSU's estimates and data from Oregon Center for Health Statistics, DHS.

<u>Area Name</u>	<u>Estimate</u>	<u>FORECAST</u>							
	<u>2000-2003</u>	<u>2000-2005</u>	<u>2005-2010</u>	<u>2010-2015</u>	<u>2015-2020</u>	<u>2020-2025</u>	<u>2025-2030</u>	<u>2030-2035</u>	<u>2035-2040</u>
OREGON	90,218	150,793	158,892	166,836	177,049	189,603	207,855	231,560	251,617
Clackamas	7,940	13,298	14,466	15,582	16,924	18,687	20,969	23,520	25,617

Net Migration

Estimates for 2000-2003 are based on PRC, PSU's estimates and data from Oregon Center for Health Statistics, DHS.

<u>Area Name</u>	<u>Estimate</u>	<u>FORECAST</u>							
	<u>2000-2003</u>	<u>2000-2005</u>	<u>2005-2010</u>	<u>2010-2015</u>	<u>2015-2020</u>	<u>2020-2025</u>	<u>2025-2030</u>	<u>2030-2035</u>	<u>2035-2040</u>
OREGON	58,773	103,767	143,442	161,847	171,677	179,044	186,502	196,057	207,240
Clackamas	9,093	15,800	19,609	22,165	23,507	25,851	27,736	30,348	33,709

**APPENDIX E:
SUPPORTING DATA AND ADDITIONAL DEMOGRAPHIC TABLES**

Other Data from Cities

**City Forecast Capacity
Canby – Canby TSP Dec 2010**

Table 4-1: Canby UGB Land Use Summary			
Land Use	Existing 2009 Land Use	Projected Growth from 2009 to 2030	Projected 2030 Land Use
<i>Households</i>			
Total Households	6,127	4,403 (+72%)	10,530
<i>Employees</i>			
Retail Employees	624	715 (+115%)	1,339
Service Employees	1,004	644 (+64%)	1,648
Educational Employees	409	257 (+63%)	666
Other Employees	1,928	3,007 (+156%)	4,935
Total Employees	3,965	4,623 (+117%)	8,588
The Future Forecasting Memorandum (see Appendix G)			

From - Canby TSP Dec 2010

An existing 2009 land use inventory and a future 2030 land use projection were performed for every parcel within the Canby UGB and aggregated into each of the 72 transportation analysis zones (TAZs), which represent the sources of vehicle trip generation within the city. A map of the Canby TAZs is provided in the Future Forecasting Memorandum (see Appendix G).

The existing 2009 land use inventory approximated the number of households and the amount of retail employment, service employment, educational employment, and other employment that currently exist in each TAZ. These land uses correspond to a population of approximately 15,165 residents.

The future 2030 land use projection is an estimate of the amount of development each parcel could accommodate at expected build-out of vacant or underdeveloped lands assuming Comprehensive Plan zoning (shown in Figure 4-1). The one exception is within the Northeast Canby Concept Plan area, which is located in northeast Canby between OR 99E, Territorial Road, Haines Road, and SE 1st Avenue, where land uses consistent with the Northeast Canby Concept Plan²² were assumed.

**APPENDIX E:
SUPPORTING DATA AND ADDITIONAL DEMOGRAPHIC TABLES**

City of Sandy – Urbanization Study, 2009

Sandy has an estimate surplus of capacity of 1,952 Dwelling Units (beyond their safe harbor forecast) or a *total residential capacity inside their UGB of 3,114 Units*

Year	Population	Employment	Pop/Emp
2009	8,034	4,394	1.83
2014	8,718	4,757	1.83
2019	9,451	5,150	1.84
2024	10,228	5,575	1.83
2029	11,023	6,036	1.83
Change 2007-2027	2,989	1,642	
Percent Change	37%	37%	
AAGR	1.6%	1.6%	

Source: City of Sandy; ECONorthwest

Plan Designation	Title	Capacity (Dwelling Units)	Needed Units	Surplus (Deficit) DU	Gross Acres Surplus (Deficit)
LDR	Low Density Residential	1,311	416	895	179.7
MDR	Medium Density Residential	316	220	96	16.6
HDR	High Density Residential	388	196	192	19.1
V	Village	1,099	324		
	Village - R-1	889	167	722	144.9
	Village - R-2	143	39	104	18.0
	Village - R-3	61	118	(57)	(5.7)
Total		3,114	1,156	1,952	372.6

Source: ECONorthwest

Plan Designation	Demand	2007 Supply	Surplus or (deficit)
Village Commercial	9.4	10.4	1.0
Commercial	84.6	134.2	49.6
Industrial	14.4	83.6	69.2
Total	108.4	228.2	119.8

Source: ECONorthwest

**APPENDIX E:
SUPPORTING DATA AND ADDITIONAL DEMOGRAPHIC TABLES**

Molalla -- Buildable Lands Inventory – 2008

Residential	Lots	Total Acres	Developed Acres	Nat Constraints Acres	Vacant Acres	Infill Acres Acres	Gross Buildable Acres
R-1	1387	436	361	22	20	34	53
R-2	264	66	58	2	3	2	5
R-3	648	187	171	4	4	9	13
Total	2299	690	590	28	26	45	71
Commercial	Lots	Total Acres	Developed Acres	Nat Constraints Acres	Vacant Acres	Infill Acres Acres	Gross Buildable Acres
C-1	196	55	52	0	2	1	3
C-2	75	127	74	5	27	21	48
Total	271	182	126	5	29	23	52
Industrial	Lots	Total Acres	Developed Acres	Nat Constraints Acres	Vacant Acres	Infill Acres Acres	Gross Buildable Acres
M-1	45	159	104	5	22	29	51
M-2	87	329	147	73	79	30	109
Total	132	488	251	78	101	59	160

**APPENDIX E:
SUPPORTING DATA AND ADDITIONAL DEMOGRAPHIC TABLES**

Estacada – Economic Opportunities Analysis - 2009

Safe Harbor	POPULATION PROJECTIONS Through 2029			
	City of Estacada and Clackamas County			
	2007 Est. Population	2020 Est. Population	2029 Est. Population	Average Annual Growth Rate
City of Estacada	2,695	3,332	3,826	1.91%
Clackamas County	372,270	460,323	528,484	1.91%
Estacada Share of Clackamas	0.72%	0.72%	0.72%	
Source: PSU Population Research Center; Oregon Office of Economic Analysis				

Estimated at 450 new households – however this is substantially less than the estimated capacity – per city staff

**Table 13
Adjusted Gross Inventory of Buildable Industrial and Commercial Lands in Estacada**

	Industrial		Commercial		Total	
	Parcels	Acres	Parcels	Acres	Parcels	Acres
Vacant	54	211.14	38	59.81	92	270.95
Potential Infill	14	62.67	24	26.43	38	89.10
Potentially Redevelopable	18	55.56	57	29.98	75	85.54
Total	86	329.36	119	116.23	205	445.59

APPENDIX F
EXCERPTS FROM STATEWIDE ECONOMIC & DEMOGRAPHIC REPORTS



**Oregon Economic and
Revenue Forecast**

June 2012

Volume XXXII, No. 1

Release Date: May 22, 2012

Michael Jordan
Chief Operating Officer
DAS Director

John A. Kitzhaber, MD
Governor

Prepared By:
Office of Economic Analysis
Department of Administrative Services

SPECIAL ANNOUNCEMENT:

Download from the Web

OEA will post all forecasts online at <http://oregon.gov/DAS/OEA/economic.shtml>. To receive an e-mail notice of new postings sign up at the following Web site.

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Department of Administrative Services

Michael Jordan
DAS Director
Chief Operating Officer

Office of Economic Analysis

Mark McMullen, Acting State Economist
Kanhaiya Vaidya, Senior Demographer
Damon Bell, Senior Analyst
Josh Lehner, Economist
Kris Klemm, Administrative Specialist

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http://cms.oregon.gov/DAS/OEA/docs/economic/forecast_0612.pdf

Foreword

This document contains the Oregon economic and revenue forecasts. The Oregon economic forecast is published to provide information to planners and policy makers in state agencies and private organizations for use in their decision making processes. The Oregon revenue forecast is published to open the revenue forecasting process to public review. It is the basis for much of the budgeting in state government.

The report is issued four times a year; in March, June, September, and December.

The economic model assumptions and results are reviewed by the Department of Administrative Services Economic Advisory Committee and by the Governor's Council of Economic Advisors. The Department of Administrative Services Economic Advisory Committee consists of 15 economists employed by state agencies, while the Governor's Council of Economic Advisors is a group of 12 economists from academia, finance, utilities, and industry.

Members of the Economic Advisory Committee and the Governor's Council of Economic Advisors provide a two-way flow of information. The Department of Administrative Services makes preliminary forecasts and receives feedback on the reasonableness of such forecasts and assumptions employed. After the discussion of the preliminary forecast, the Department of Administrative Services makes a final forecast using the suggestions and comments made by the two reviewing committees.

The results from the economic model are in turn used to provide a preliminary forecast for state tax revenues. The preliminary results are reviewed by the Council of Revenue Forecast Advisors. The Council of Revenue Forecast Advisors consists of 15 specialists with backgrounds in accounting, financial planning, and economics. Members bring specific specialties in tax issues and represent private practices, accounting firms, corporations, government (Oregon Department of Revenue and Legislative Revenue Office), and the Governor's Council of Economic Advisors. After discussion of the preliminary revenue forecast, the Department of Administrative Services makes the final revenue forecast using the suggestions and comments made by the reviewing committee.

Readers who have questions or wish to submit suggestions may contact the Office of Economic Analysis by telephone at 503-378-3405.



Michael Jordan
DAS Director
Chief Operating Officer

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EXECUTIVE SUMMARY

June 2012

Oregon Economic Forecast

Current Conditions

A chorus of indicators suggests that economic conditions are improving for many of Oregon's families and businesses. Unfortunately, the pace of improvement remains slower than what we have become accustomed to in past economic recoveries, and has not been shared across all communities.

Although recent gains have been broad-based across industries, they have not been broad-based across regions of the state. In general, communities that are located more than an hour's drive from the Columbia River are no better off now than they were when the nationwide recession ended two years ago.

Outlook

Oregon's economy can reasonably expect more of the same in the future. Most forward-looking data suggest that growth will continue. However, there is still ample reason to believe that this growth will remain disappointing from a historical perspective, with the statewide economy likely to struggle to pick up any further momentum.

The typical household still needs to save more, and spend less, of their income over the extended horizon. When less spending is combined with the broader effects of an aging baby-boom population cohort, Oregon and other states will face an uphill climb for many years to come.

What little acceleration that can be hoped for is tied to a long-awaited improvement in regional housing markets. Mortgage rates are very low, as are single-family house prices relative to apartment rents. Single-family housing markets are finally showing a weak pulse in many areas of the state.

House prices will remain depressed until most of the unwanted properties are purged from the balance sheets of lenders and underwater homeowners. Even so, improved housing investment, construction activity and spending on home furnishings represents the best hope for a speedier recovery.

The baseline (most likely) employment forecast remains essentially unchanged. Slow growth will continue to be the norm. Oregon is not expected to recover all of the jobs it has lost until the end of 2014—seven years after the recession began.

Risks

There is little to suggest that a new recession is upon us. The possibility that Oregon will return to recession this summer is looking much less likely than it appeared a few months ago. Nevertheless, a considerable amount of uncertainty remains in the outlook since there is still plenty of time for the expansion to unwind before we reach the end of the biennium.

The primary downside risk currently on the radar is the ongoing production slowdown among some of Oregon's largest trading partners in Asia. With consumers needing to repair their household finances, Oregon's economic expansion has been led by business investment and exports, both of which would suffer greatly if Asian demand were to fade.

Even if the root cause of a future downturn turns out to be a financial crisis within the European Union, a primary channel through which problems would manifest themselves here in Oregon would be via a reduction in trade flows to and from Asia. Many of the Asian manufacturers we do business with cater to European clients. Furthermore, access to a healthy global credit market is a prerequisite for suppliers and transportation firms to operate.

Summary of Recent Trends

Our office examines four main sources for labor market information: the monthly payroll employment survey, the monthly household employment survey, monthly withholding tax receipts and the quarterly census of employment and wages. Right now, three out of the four indicate solid economic improvement that is at least as strong as the national growth figures, while one shows essentially no improvement over the past fourteen months. That one bad indicator is the monthly payroll employment survey, which eventually will be revised to look like the others. Oregon's labor market is improving right along with the nation overall, if not a little bit faster.

After technical adjustments¹, the data reveals a state that continues to expand slowly, adding slightly more than 15,000 jobs in the past year (0.9% through 2012q1), instead of a state that is stagnating, adding only 4,400 jobs in the past year (0.3%). Granted, the differences are small in percentage terms, yet important to understanding the lackluster expansion and interpreting recent events in light of our economic outlook.

In terms of industries, over the past year the job growth has been widespread with only wood products and government seeing declines. The largest gains have been in professional and business services and health services, which increased by approximately 5,400 and 4,300, respectively, from 2011q1 to 2012q1. Leisure and hospitality and retail trade each added 3,300 jobs over the past year. These four main sectors account for approximately 64 percent of all private sector gains, with total manufacturing accounting for another 19 percent, or 4,800 jobs. Within manufacturing, gains were led by durable goods, particularly metals and machinery. The public sector continues to lose jobs with the majority of the losses occurring in local education.

¹ See the Oregon section for detailed information

Even with the majority of the economic data and news being positive, the forecast for economic growth – chiefly income and jobs – remains largely unchanged relative to recent forecasts. Substantial risks, concentrated to the downside, remain outstanding and may derail the fragile recovery. Even avoiding these downside risks, the rate of growth is still expected to remain average to slightly below average. OEA forecasts an employment increase of 1.0 percent in the second quarter of 2012 and 2.3 percent in the third quarter. Job gains will remain subdued in 2012, improving at a 1.4 percent pace overall, following 1.1 percent gains in 2011. The rate of growth will pick up in 2013 at 2.4 percent and 2014 at 2.3 percent however even these rates of growth are only slightly above Oregon's long-run employment average of 2.2 percent.

Demographic Forecast

Oregon's population count on April 1, 2010 was 3,831,074. Oregon gained 409,550 persons between the years 2000 and 2010. The population growth during the decade of 2000 and 2010 was 12.0 percent, down from 20.4 percent growth from the previous decade. Oregon's rankings in terms of decennial growth rate dropped from 11th between 1990-2000 to 18th between 2000-2010. Slow population growth during the most recent decade due to double recessions probably cost Oregon one additional seat in the U.S. House of Representatives. Actually, Oregon's decennial population growth rate during the most recent decade was the second lowest since 1900. The slowest was during the 1980 when Oregon was hit hard by another recession. As a result of recent economic downturn and sluggish recovery, Oregon's population is expected to continue a slow pace of growth in the near future. Based on the current forecast, Oregon's population will reach 4.27 million in the year 2020 with an annual rate of growth of 1.1 percent between 2010 and 2020.

Oregon's economic condition heavily influences the state's population growth. Its economy determines the ability to retain local work force as well as attract job seekers from national and international labor market. As Oregon's total fertility rate remains below the replacement level and deaths continue to rise due to ageing population, long-term growth comes mainly from net in-migration. Working-age adults come to Oregon as long as we have favorable economic and employment environments. During the 1980s, which included a major recession and a net loss of population, net migration contributed to 22 percent of the population change. On the other extreme, net migration accounted for 73 percent of the population change during the booming economy of 1990s. This share of migration to population change declined to 56 percent in 2002 and it was further down to 32 percent in 2010. As a sign of slow to modest economic gain, the ratio of net migration-to-population change will increase gradually and will reach 70 percent by the end of the forecast horizon. Although economy and employment situation in Oregon look stagnant at this time, migration situation is not expected to replicate the early 1980s pattern of negative net migration. Potential Oregon out-migrants have no better place to go since other states are also in the same boat in terms of economy and employment.

Age structure and its change affect employment, state revenue, and expenditure. Demographics are the major budget drivers, which are modified by policy choices on service delivery. Growth

in many age groups will show the effects of the baby-boom and their echo generations during the period of 2010-2020. It will also reflect demographics impacted by the depression era birth cohort combined with diminished migration of the working age population and elderly retirees. After a period of slow growth during the 1990s and early 2000s, the elderly population (65+) has picked up a faster pace of growth and will surge as the baby-boom generation continue to enter this age group. The average annual growth of the elderly population will be 3.9 percent during the forecast period as the boomers continue to enter retirement age. However, the youngest elderly (aged 65-74) will grow at an extremely fast pace during the forecast period, averaging 4.9 percent annual rate of growth due to the direct impact of the baby-boom generation entering retirement age. Reversing several years of shrinking population, the elderly aged 75-84 will start a positive growth as the effect of depression era birth-cohort will dissipate. A faster pace of growth of population in this age group will begin once the baby-boom generation starts to mature. The oldest elderly (aged 85+) will continue to grow at a moderately but steady rate due to the combination of cohort change, continued positive net migration, and improving longevity. The average annual rate of growth for this oldest elderly over the forecast horizon will be 1.6 percent.

As the baby-boom generation matures out of oldest working-age cohort combined with slowing net migration, the once fast-paced growth of population aged 45-64 will gradually taper off to below zero percent rate by 2012 and will remain at slow or below zero growth phase for several years. The size of this older working-age population will decline during the forecast horizon of 2010-2020. The 25-44 age group population is recovering from several years of declining and slow growing trend. The decline was mainly due to the exiting baby-boom cohort. This age group has seen positive growth starting in the year 2004 and will increase by 1.1 percent annual average rate during the forecast horizon. The young adult population (aged 18-24) will change only a little over the forecast period and remain virtually unchanged for most of the years into the future. Although the slow or stagnant growth of college-age population (age 18-24), in general, tend to ease the pressure on public spending on higher education, college enrollment typically goes up during the time of high unemployment and scarcity of well-paying jobs when even the older people flock back to college to better position themselves in a tough job market. The growth in K-12 population (aged 5-17) will remain low which will translate into slow growth in school enrollments. This school-age population has actually declined in size in recent years and will grow in the future at well below the state average. The growth rate for children under the age of five will remain below zero percent in the near future and will see positive growth only after 2013. Although the number of children under the age of five will decline slightly in the near future, the demand for child care services and pre-Kindergarten program will be additionally determined by the labor force participation and poverty rates of the parents. Overall, elderly population over age 65 will increase rapidly whereas population groups under age 65 will experience slow growth in the coming decade. Hcncc, based solely on demographics of Oregon, demand for public services geared towards children and young adults will likely to increase at a slower pace, whereas demand for elderly care and services will increase rapidly.

Revenue Forecast

The peak filing season for personal income taxes came and went this year without any major April revenue surprises on either the upside or downside. The slow-growth year that was expected following the revenue boom seen in April 2011 largely came to pass, with personal income taxes coming in slightly below projections (-0.4%) over the peak tax season.

Although the overall magnitude of personal income tax collections closely met expectations, the pattern of growth did not. In general, personal income taxes levied on wages and salaries in the workplace came in somewhat stronger than expected, while collections flowing from taxable investment income were weaker than expected.

Always volatile corporate income tax collections closely matched the March forecast as well (+4.6%). Corporate income tax collections have stabilized in recent weeks, but remain down sharply relative to last year. The forecast calls for corporate tax collections to remain weak until fiscal year 2014.

Overall, revenue growth in fiscal year 2013 is expected to roughly match the modest gains seen in fiscal year 2012. Revenue growth is expected to accelerate somewhat during the 2013-15 biennium as the housing market begins to wake up, but gains will remain below historical norms.

Since the March forecast, combined general fund and lottery resources have been increased by \$107 million for the 2011-13 biennium. This increase reflects \$128 million in additional one-time transfers and other legislative changes associated with the 2012 Rebalance Plan. Excluding the impact of these legislative changes, combined general fund and lottery resources have been lowered by \$22 million (-0.1%) for the 2011-13 biennium.

Total resources have been lowered by \$20 million in the 2013-15 biennium, and by \$82 million in 2015-17. Longer term revenue losses are not the result of a weaker economy, but rather are due to more pessimistic expectations for taxable capital gains realizations and video lottery sales.

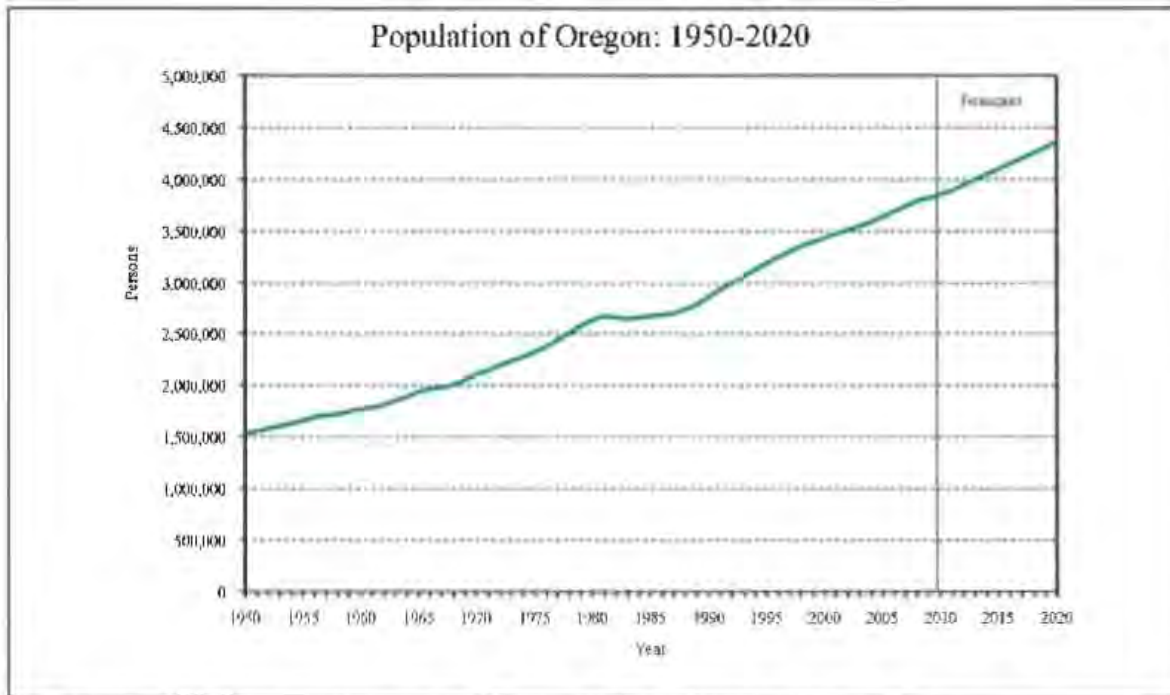
Revenue growth in Oregon and other states will face considerable downward pressure over the 10-year extended forecast horizon. As the baby boom population cohort works less and spends less, traditional state tax instruments such as personal income taxes and general sales taxes will become less effective, and revenue growth will fail to match the pace seen during recent periods of economic expansion.

6

OREGON'S DEMOGRAPHIC TRENDS

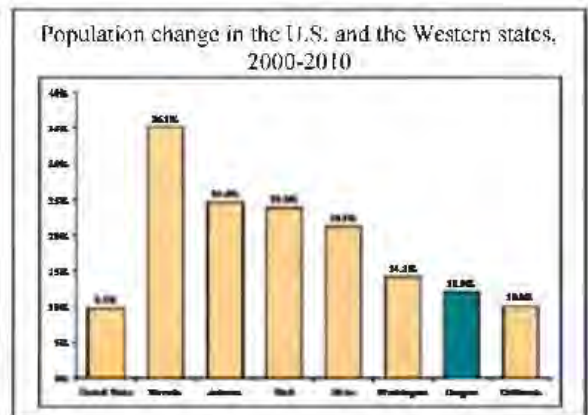
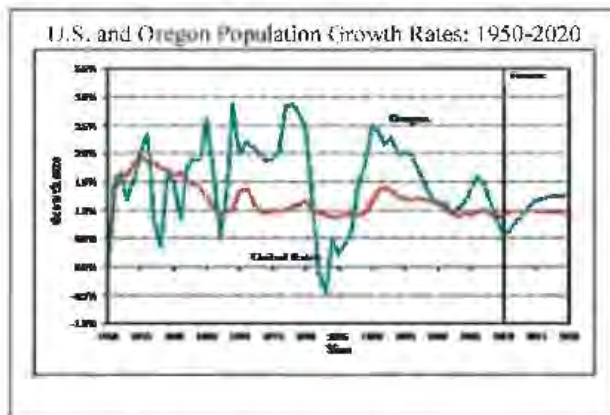
Office of Economic Analysis
Department of Administrative Services
State of Oregon
November 2011

Contact: kanhaiya.L.VAIDYA@state.or.us



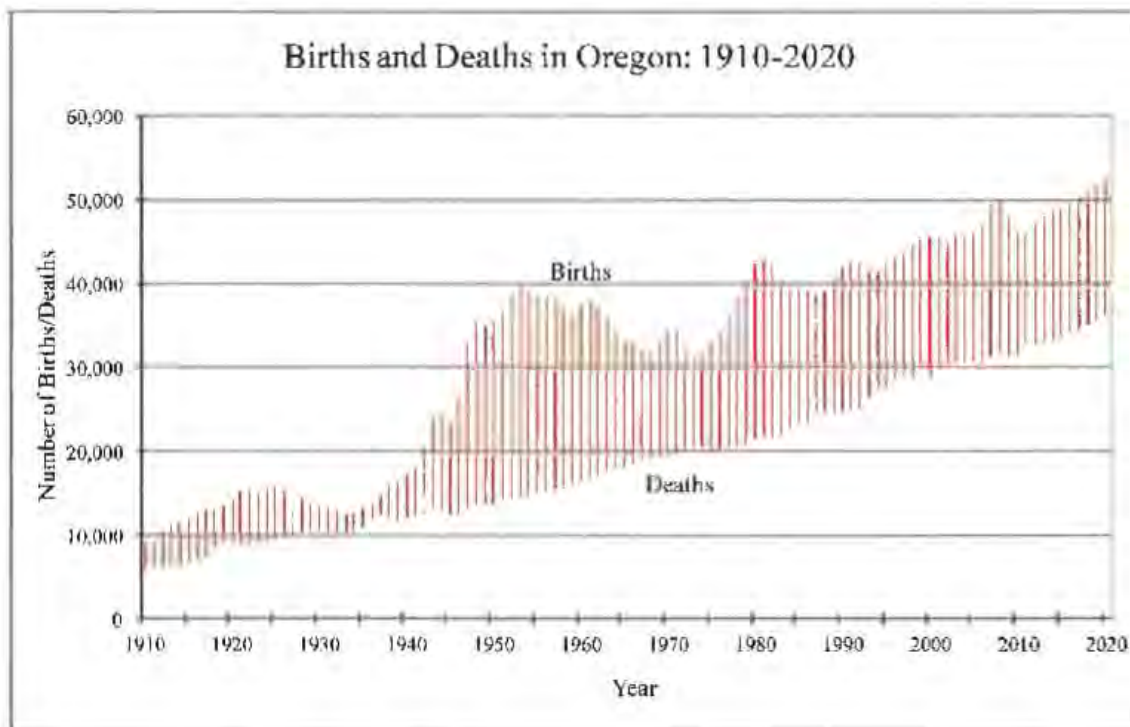
Source: U.S. Bureau of Census; and Oregon Office of Economic Analysis.

- Oregon's population count on April 1, 2010 was 3,831,074. Oregon's population increased by 2.5 times since 1950, and is expected to reach 4.3 million by the year 2020.
- The population growth during the decade of 2000 and 2010 was 12.0 percent, down from 20.4 percent growth from the previous decade.
- High population growth rates during the decades of 50s through 70s and 90s were accompanied by economic expansion in the state. In general higher population growth is associated with healthy economy characterized by higher employment, lower unemployment rate, and higher revenue collection. On the flip side, faster population growth means greater traffic congestion, higher school enrollment, and increased demand for government services, among others.



Source: U.S. Bureau of Census; and Oregon Office of Economic Analysis.

- Since 1950, Oregon's population has increased at a faster pace than the U.S. population as a whole. Oregon's annual growth rate exceeded U.S. rate for most of the years. Between 1950 and 2010, Oregon's population increased by 152 percent, whereas U.S. population increased by 104 percent.
- Oregon is hit harder by the recent recession than many other states. Since economy and migration are closely related, Oregon's population slowed down considerably. Currently Oregon's growth rate is below the national growth rate.
- Oregon's rankings in terms of decennial growth rate dropped from 11th between 1990-2000 to 18th between 2000 and 2010. Although Oregon's population growth was higher than the U.S. growth over the last decade, Oregon's neighboring states, except California, exceeded our population growth.
- In the long run, Oregon's growth rate is expected to remain higher than the U.S. rate.



Source: U.S. Bureau of Census; and Oregon Office of Economic Analysis.

- Annual number of births in the past has fluctuated based on the fertility behavior of women and the number of women in child-bearing ages.
- Currently, about 46,000 children are born each year in Oregon. Since 1950, the life-time average number of children per women fluctuated from a high of 3.6 in 1960 to 1.7 in 1975. It is expected to remain slightly below 2.0 in the future. The annual number of births will approach 53,000 by 2020 as the number of women in child-bearing ages increase.
- Historical knowledge of birth patterns is important and interesting because they shape the current and future age structure of the population. The small number of depression era births and the huge number of births during the baby-boom period, for example, affected different social and economic institutions in two extreme ways. These two extreme birth cohorts are responsible for shaping the retirement age population of Oregon.
- The number of deaths in Oregon has been increasing as the result of increased number of total as well as elderly populations. Currently, the number of deaths totals about 31,500 per year. As the baby boom generation age, the annual number of deaths will increase very rapidly and will exceed 36,000 by the year 2020.

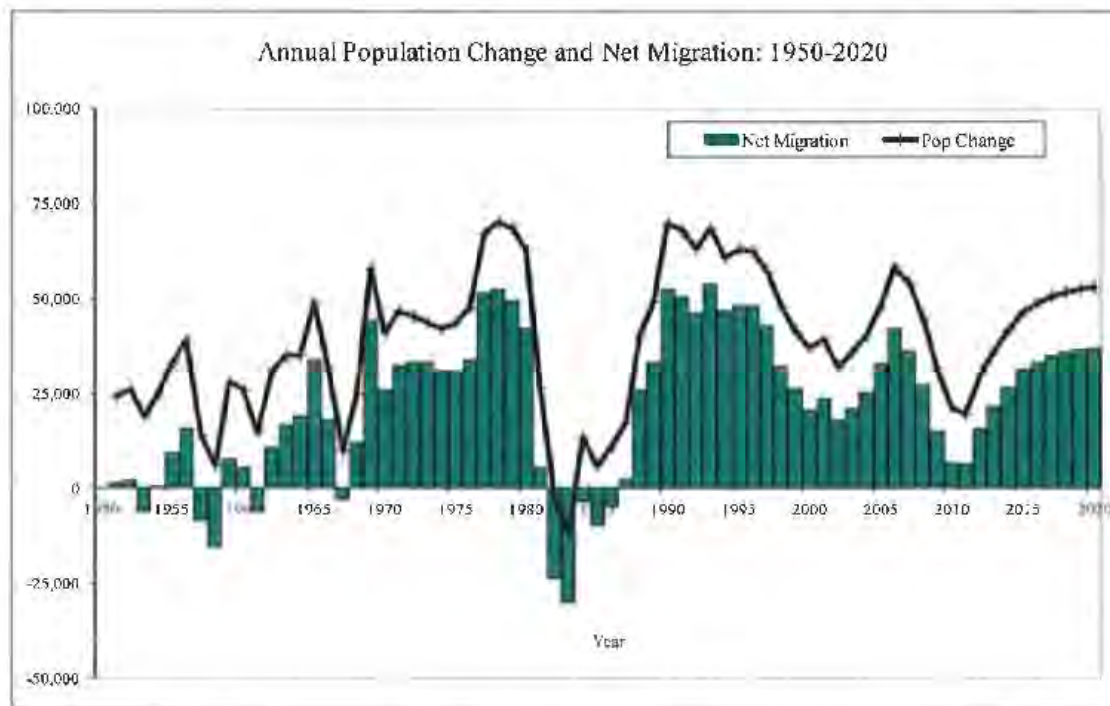
OREGON: Projected Life Expectancy at Birth

Year	Male	Female	Difference (Female-Male)
1970	68.4	76.2	7.8
1980	71.4	78.8	7.4
1990	73.4	79.8	6.4
2000	75.7	80.2	4.5
2010	77.1	81.7	4.6
2020	78.5	82.9	4.4

Sources: 1970 & 1980: U.S. Department of Health and Human Services,
National Center for Health Statistics.

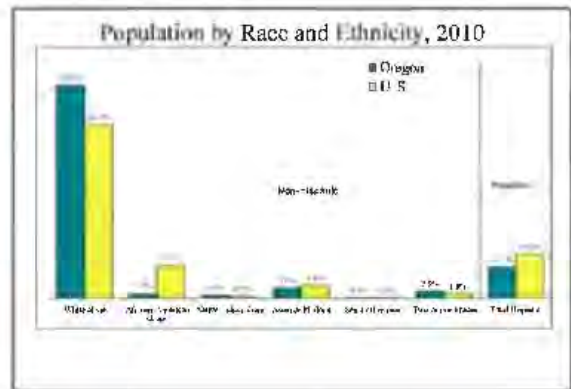
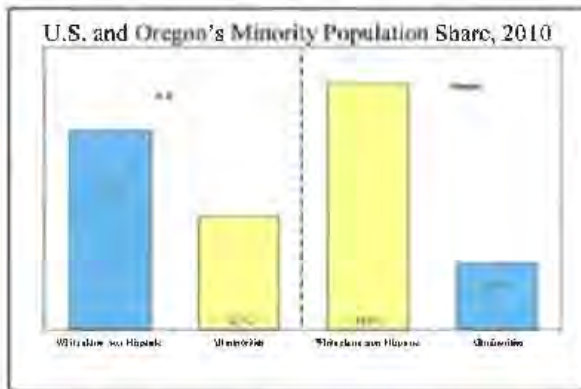
1990 to 2020: Oregon Office of Economic Analysis

- In the past 40 years, between 1970 and 2010, life expectancy for Oregon men improved by 8.7 years and for women by 5.5 years. Oregon's life expectancy has remained slightly higher than the U.S. average. The life expectancy will continue to improve for both men and women. However, the gain for men will outpace the gain for women. Consequently, the difference between men's and women's life expectancies will continue to shrink.



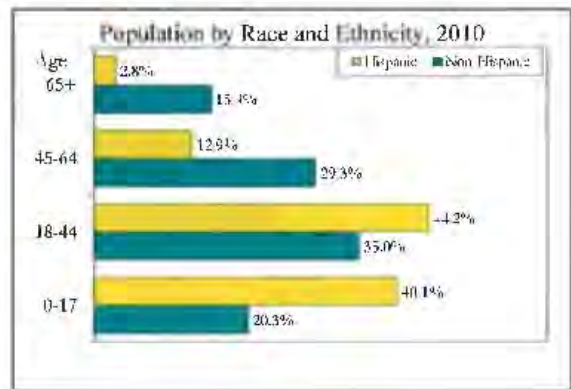
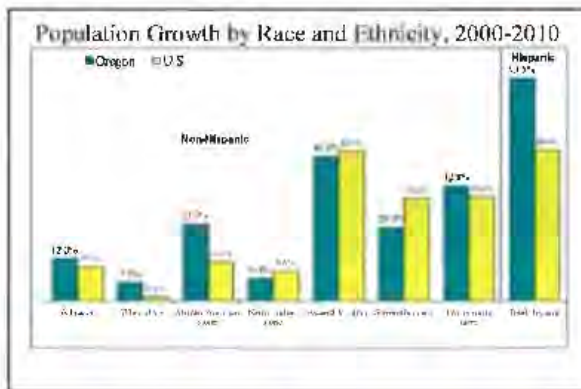
Source: U.S. Bureau of Census; and Oregon Office of Economic Analysis.

- Oregon's population change is greatly influenced by net migration, and migration is in turn affected by overall economy of the state. Because of the gloomy economic and employment situation in the state, migration flow has considerably slowed down. Based on the recent population estimates, the net migration has not turned negative during this recession as it did during the recession of early 1980s.
- Currently, nearly 32 percent of the population growth in Oregon is due to net in-migration in Oregon. This share is the lowest since 1987. When Oregon economy was rapidly expanding during the 1990s and mid 2000s, net migration accounted for nearly three-fourths of the population growth. Migration is expected to contribute nearly two-thirds of the population growth of Oregon in the next decade. During 1990s, net migration averaged about 42,000 persons per year. The average annual net migration for 2000 to 2010 was 25,000. The next decade will see a slight increase in net migration as the economy recovers. The average for 2010 to 2020 is expected to be 28,000. As a sign of slow to modest economic gain, the ratio of net migration-to-population change will increase gradually and will reach 70 percent by 2020, from the current low of 32 percent.

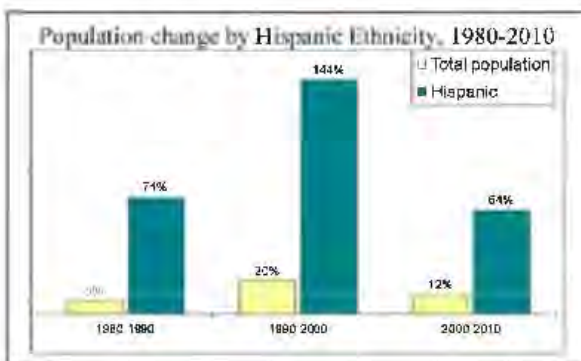


Source: U.S. Bureau of Census.

- In 2010, 21.5 percent of Oregonians belonged to a minority race or ethnic group, compared to 36.3 percent in the United States.
- Hispanics or Latinos account for 11.7 percent of Oregon's population, compared to 16.3 percent in the nation.
- The largest minority racial group in Oregon is Asian or Pacific Islander accounting for 4.0 percent of the population.



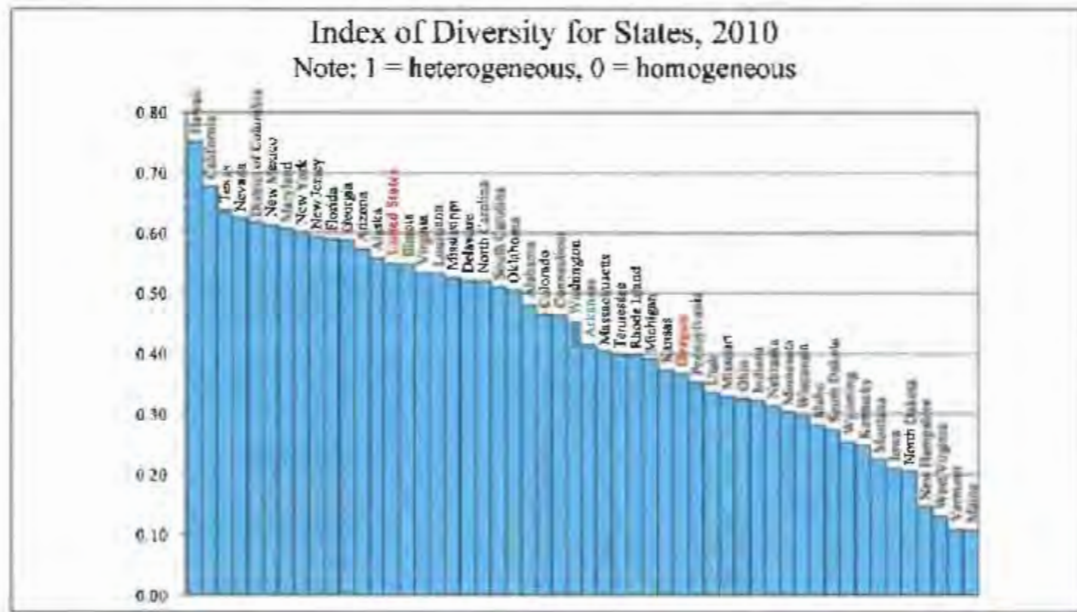
Source: U.S. Bureau of Census.

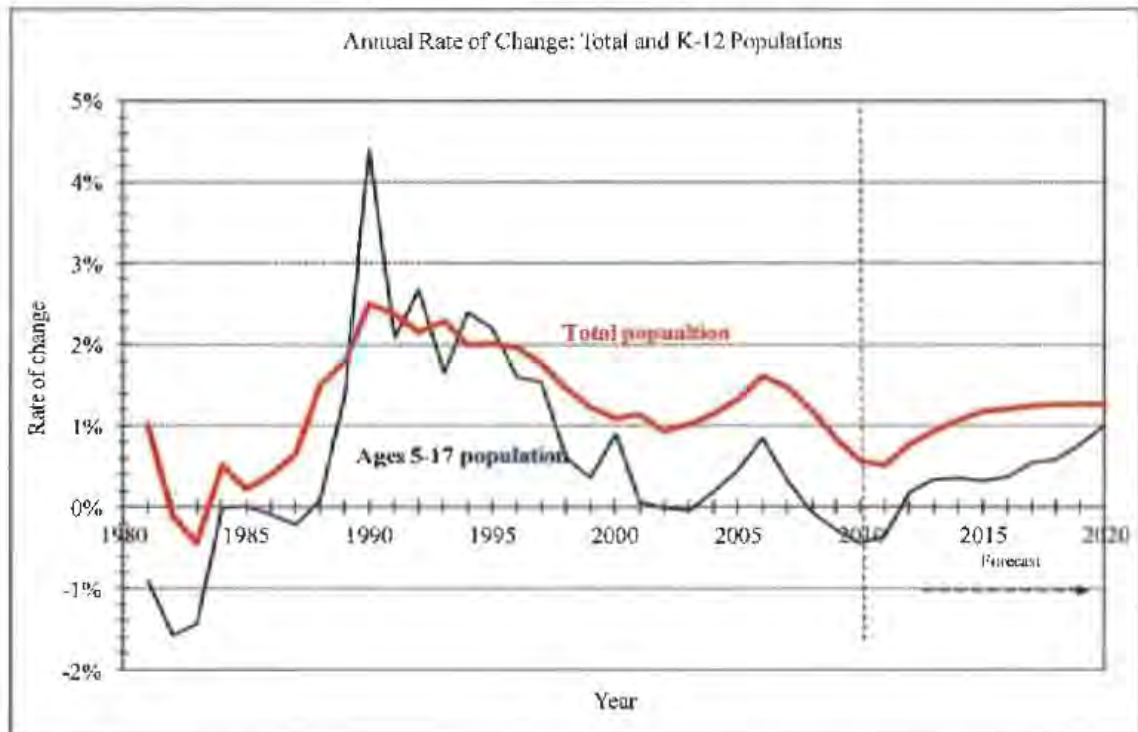


- It is notable that minority group as a whole in Oregon is growing at faster pace than the corresponding rates at national level thereby accelerating the diversity of Oregon's population.
- Hispanics are growing very rapidly in the state. The growth was much more

rapid than during the previous decade. Between 1980 and 1990, Hispanic population increased by 71 percent. Between 1990 and 2000, however, the population increased by astounding 144 percent. In the last decade, the Hispanic population increased by 64 percent, slowest in a three-decade period, but more than five times the non-Hispanic population increase.

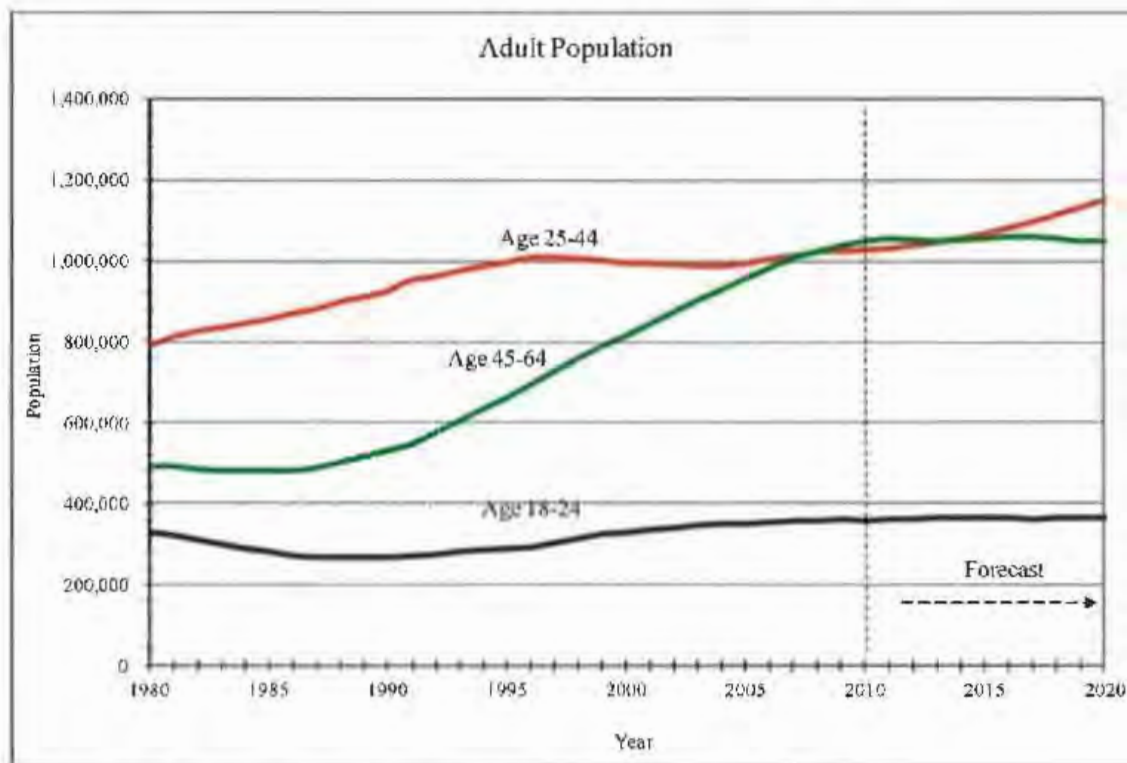
- Hispanic population tends to be recent immigrants and is associated with large family. Consequently, overwhelming proportion of them are children and young adults.
- Although minority population is increasing rapidly in Oregon adding to its diversity, the State still remains one of the least diverse in the country in terms of race in ethnicity.





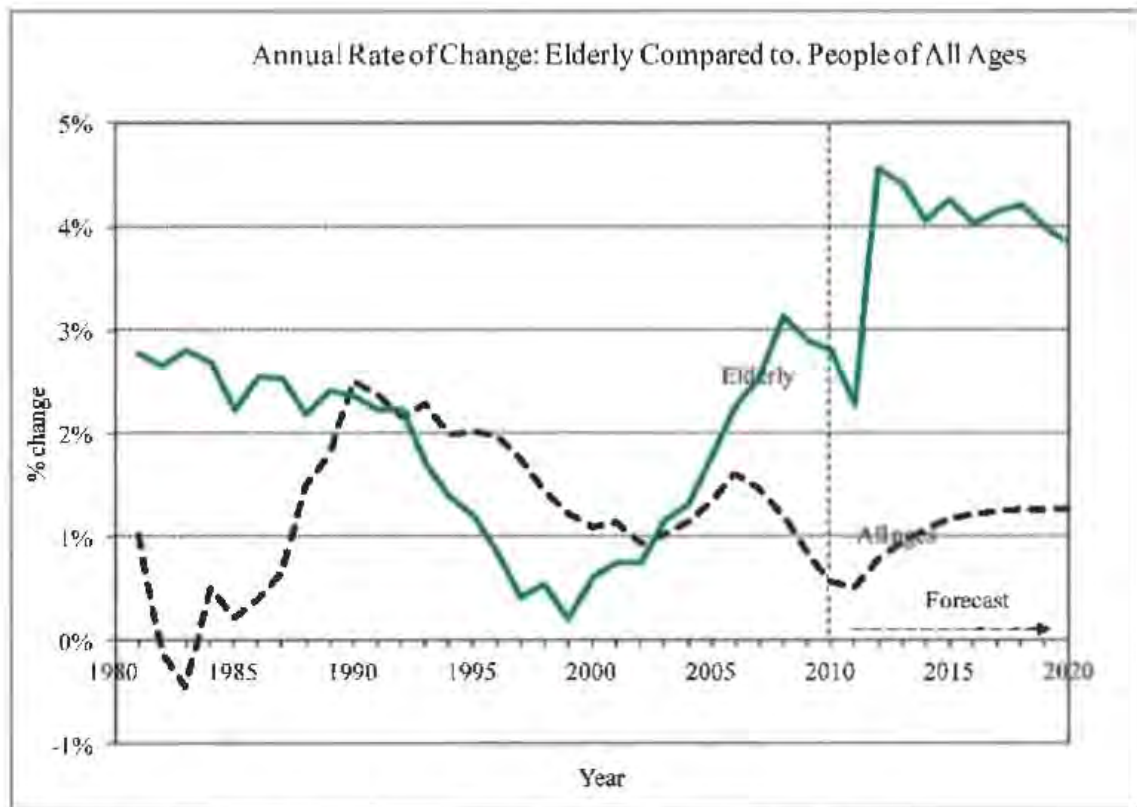
Source: U.S. Bureau of Census; and Oregon Office of Economic Analysis.

- Growth rate in school-age population is tracking below the overall population growth rate in Oregon. Main reasons for the slower growth are declining fertility rate and slower growth in the women in prime childbearing ages characterized by baby-bust generation. Growth in this K-12 population group will continue to lag well behind the overall population growth.
- Currently, number of children in 5-17 age group accounts for 16.4 percent of the population, down consistently from 19.9 percent in 1980 and 18.0 percent in the year 2000. This share will gradually decline over time to 15.4 percent in 2020.
- Total K-12 enrollments account for about 89 percent of the school-age population. During 2001-03, nearly 91 percent of all K-12 students were enrolled in Oregon's public schools. The remainders were enrolled in private schools (6 percent), and home schooling (3 percent). The distribution of students in public, private, and home schools depends upon Oregon's economy and perception of quality, value, and service of each school type. In times of negative perception of public schools, enrollments shift to private and home schools. In times of economic hardship, ironically, publicly funded schools tend to carry greater weight when the public schools suffer from budget shortfall.



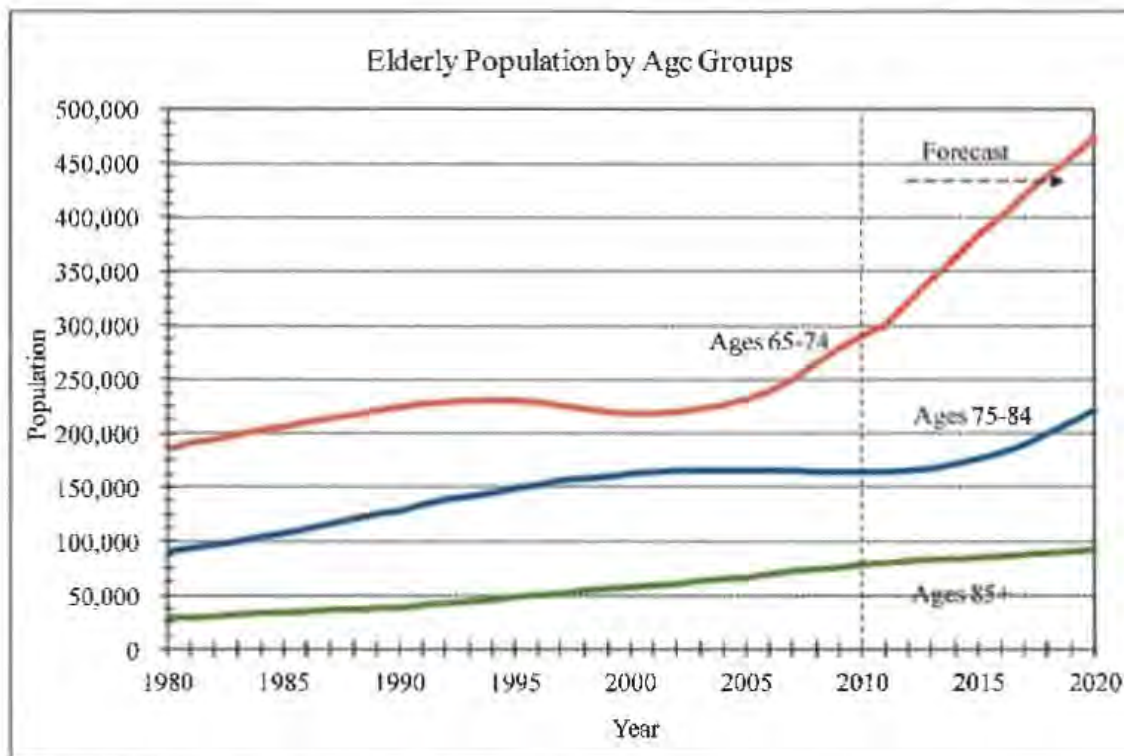
Source: U.S. Bureau of Census; and Oregon Office of Economic Analysis.

- Adult population in age group 18-64 account for nearly 63 percent of the total population, up from 60 percent in 1990. Since the older baby-boomers are leaving this age cohort and entering the retirement age, this share will continue to decline.
- Adults 18-64 year olds will grow at much slower pace than the overall population, thereby signaling labor shortage in the future.
- Population in age group 18-24, generally known as college-age population, had fast paced growth during the 1990s and early 2000s mainly because of the children of baby-boomers entering this age group. However, growth has since tapered off and will even see negative growth in the near future.
- Population in age group 25-44 is in a growing mode after a decade of slow and negative growth because of the exit of baby-boomers from this cohort. However, the rate of growth will remain much slower than overall population growth of the state.
- Population in age group 45-64 was increasing very rapidly as the impact of baby-boomers entering this age group. However, the slow and negative growth of 25-44 age group will transfer to this 45-64 age group as the baby-boomers mature into retirement age. This cohort will see very slow and negative growth in the coming future.



Source: U.S. Bureau of Census; and Oregon Office of Economic Analysis.

- Slow and generally declining growth of elderly population, compared to the overall population, that began in 1990 lasted until 2003. Since then the elderly population growth has outpaced the overall population growth rate due to cohort change and cumulative effect of net migration.
- The population in this age group will start a dramatic increase once the baby-boomers start and continue to enter the retirement age. Beginning in 2001, the elderly population growth rate will exceed 4 percent annually for nearly a decade. There will be 48 percent more elderly in 2020 than in 2010.



Source: U.S. Bureau of Census; and Oregon Office of Economic Analysis.

- During the late 1990s, the youngest elderly population was actually declining despite a continued high migration of people of all ages during that time. The main reason was the entry of depression era small birth cohort entering the retirement age. In the recent years, however, the youngest elderly population has been increasing rapidly as they mature into older age cohort of 75-84 years old. At its peak in 2012, the youngest elderly will increase by over 7 percent. Between 2010 and 2020, this population will increase by 63 percent, whereas overall population will grow by 11.2 percent.
- The elderly in age group 75-84 was declining in the recent years due to the effect of entering depression era birth cohort. However, this age group will also see a rapid growth in the future as fast growing younger elderly matures into this age group. Between 2010 and 2020, this population will increase by 35 percent.
- The oldest elderly population was growing at a record pace during the 1990s, when the number swelled by nearly 50 percent. The rate of growth has slowed down and will continue to taper off in the next decade. Still, the rate of change will remain well above the overall population change. Between 1990 and 2000, the oldest elderly population increased by 50 percent, which slowed down to 36 percent between 2000 and 2010, and during the next decade this population will increase by 17 percent.

- As women live longer than men on average, 55 percent of the elderly are women. Among the oldest elderly, however, 66 percent are females. In other words, there are 80 men for every 100 women aged 65 and older. For those 85 and older, the sex ratio drops to 52 men for 100 women.

<u>Year</u>	<u>Male</u>	<u>Female</u>	<u>Total</u>
1980	29.5	31.0	30.3
1990	33.4	35.4	34.4
2000	35.2	37.6	36.4
2010	37.2	39.4	38.3
2020	38.5	40.5	39.5

Source: U.S. Bureau of Census; and Oregon Office of Economic Analysis.

- Oregon's population is graying. Median age of the population has increased from 30.3 years in 1980 to 38.3 years in 2010. This will increase further to 39.5 years by the year 2020.



MIKE McCALLISTER
PLANNING AND ZONING DIRECTOR

DEPARTMENT OF TRANSPORTATION AND DEVELOPMENT

DEVELOPMENT SERVICES BUILDING
150 BEAVERCREEK ROAD OREGON CITY, OR 97045

STAFF REPORT

To: Clackamas County Planning Commission

From: Martha Fritzie, Senior Planner; Planning & Zoning Division

Date: February 14, 2013

RE: File ZDO-242; Proposed Comprehensive Plan Text Amendment: Adoption of 20-year Coordinated Population Forecasts for the cities of Barlow, Canby, Estacada, Molalla and Sandy

PROPOSAL

ZDO-242 includes proposed text amendments to the County's Comprehensive Plan for consideration by the County Planning Commission (PC) and Board of County Commissioners (BCC).

The proposed Comprehensive Plan text amendments would:

1. Adopt into Chapter 4 (Land Use), the following 20-year population forecasts for the cities of Barlow, Canby, Estacada, Molalla and Sandy.

City	2012 population	2032 population	Net growth 2012-2032	AAGR 2012-2013
Barlow	136	146	10	0.4%
Canby	16,820	26,730	9,910	2.3%
Estacada	2,845	4,345	1,500	2.1%
Molalla	8,532	12,760	4,228	2.0%
Sandy	10,411	17,970	7,559	2.8%

These forecasts were completed to be consistent with OAR 660-024-0030 [citation corrected 3/12/13] and meet the statutory requirements of ORS 195.025 and ORS 195.036, which require all the coordinating bodies within the state to establish and maintain 20-year coordinated forecasts for their cities.

2. Add Clackamas County Rural Cities Population Coordination Background Report and Forecasts, Final Draft: February 14, 2013, to Appendix B, which lists

additional supporting documents. This report will replace two previously-cited population forecast reports in Appendix B.

The complete text of the Comprehensive Plan amendments proposed by County staff for adoption can be found in ATTACHMENT A to this staff report.

The complete text of the Clackamas County Rural Cities Population Coordination Background Report and Forecasts, Final Draft: February 14, 2013, can be found in ATTACHMENT B to this staff report.

BACKGROUND

Local governments in Oregon have developed and adopted population forecasts for planning purposes since the inception of the statewide planning program in the late 1970's. The forecasts are used to determine the size of Urban Growth Boundaries (UGBs), guide capital improvement planning, and meet other planning requirements.

State law requires that population forecasts be managed by a "coordinating body," which is to establish and maintain a 20-year population forecast for the entire area within its boundary (ORS 195.036). Metro is the coordinating body for the urban areas of Clackamas County, Washington County, and Multnomah County within the Metro boundary. Clackamas County is the coordinating body for the rural area of the county (the area outside the Metro boundary), including the five rural cities of Barlow, Canby, Estacada, Molalla, Sandy. To date, the County has not coordinated forecasts for its rural cities. Because Metro is currently coordinating regional households forecasts that include planning areas beyond the Metro boundary in its model, Clackamas County had the opportunity to use forecasts developed by this agency as a basis for its rural cities' population coordination.

In January 2012, Clackamas County's Planning Division received a grant from the Department of Land Conservation and Development (DLCD) to complete a coordinated population forecast for its rural cities in compliance with OAR 660-024-0030 [*citation corrected 3/12/13*] and ORS 195.025 and ORS 195.036. Over the last year, county staff has worked with staff for the various cities and Metro to assess long-term household forecasts generated by Metro for the county as well as sub-regions within the county. Metro released forecasts in increments and asked local jurisdictions to review the forecasts and recommend adjustments based on each jurisdiction's "local knowledge." County staff worked with city staff to complete these reviews. For this proposal, Metro's 2035 forecast for the rural cities was analyzed and, in some cases, revised based on this local knowledge; past and expected future growth trends; and the assumption that most growth expected in the general vicinity of a rural city would actually occur within the city, rather than on surrounding rural lands, because of more restrictive zoning outside cities.

Population forecasts for the 2012-2032 period (as is required by the grant) were extrapolated from the 2035 forecasts generated by Metro and were coordinated with each

of the cities. For more detail about the analysis and the results, please see ATTACHMENT B to this staff report for the complete text of the population report.

PUBLIC NOTICE

Notice of this proposal was sent to the following parties, agencies and departments:

- a. DLCD, ODOT, Metro
- b. Cities of Barlow, Canby, Estacada, Molalla, and Sandy
- c. County Community Planning Organizations, Hamlets and Villages
- d. County Planning Commission members
- e. Local Newspaper (Oregonian)

The cities of Canby and Sandy have responded with letters of support for this proposal (attached as Exhibits 2 & 3). To date, no other parties from this list have responded.

ANALYSIS AND FINDINGS

This proposal is subject to the relevant County Comprehensive Plan (Plan) policies and Zoning & Development Ordinance (ZDO) regulations; Statewide Planning Goals; and Oregon Revised Statutes (ORS) and Administrative Rules (OARs).

a. County Comprehensive Plan (Plan) policies and Zoning & Development Ordinance (ZDO)

1. *Legislative text amendment.* The proposed ZDO amendments are legislative. Section 1400 of the Clackamas County ZDO establishes procedural requirements for legislative amendments, which have been or are being followed in this case. The ZDO contains no review criteria that must be applied when considering an amendment to the text of the ZDO or the Plan.
2. *Required coordination.* Chapter 11 of the Plan contains a section entitled *City, Special District and Agency Coordination*. This project was completed through a coordinated effort between the county and the five rural cities. Coordination was completed through meetings, phone calls and email. Each of the cities has indicated support of this proposal, either verbally or in writing. Written comments are included in the Exhibits for this staff report. Documentation of coordination efforts is included in the Clackamas County Rural Cities Population Coordination Background Report and Forecasts, Final Draft: February 14, 2013.
3. The cities of Barlow, Canby, Estacada, Molalla and Sandy, service districts and Metro were notified of the proposed ZDO amendments 35 days before the scheduled public hearing. This level of notification furthers the goals and policies of this section of the Plan.

4. *Procedural Standards for Plan Amendments.* Chapter 11 of the Plan also contains a section entitled *Amendments and Implementation*, which lays out procedural standards for Plan amendments, requires the Plan and the ZDO to be consistent with Statewide Planning Goals and Guidelines and Metro's Urban Growth Management Functional Plan, and requires the ZDO to be consistent with the Plan. Policy 3.0 establishes procedural standards. The process followed for ZDO-242 is compliant with these standards. Specifically, notice was mailed to all recognized Community Planning Organizations at least 35 days before the scheduled public hearing, and the Department of Land Conservation and Development (DLCD) and Metro were provided with an opportunity to review and comment on the proposed amendments in accordance with state law. An advertised public hearing is being held before the Planning Commission to consider the proposed amendment.

This proposal is consistent with all relevant County Comprehensive Plan (Plan) policies and Zoning & Development Ordinance (ZDO) regulations.

The Statewide Planning Goals and Guidelines and relevant State Statutes and Administrative Rules are addressed below. Metro's Urban Growth Management Functional Plan is not addressed because the cities involved in this project are outside the Metro boundary.

b. **Statewide Planning Goals and Guidelines**

1. *Goal 1 - Citizen Involvement.* The proposed Comprehensive Plan amendments do not propose to change the structure of the county's citizen involvement program. Notice of the proposed amendment was provided to the five rural cities, Community Planning Organizations and a list of interested parties. Also, notice of the Planning Commission and Board of County Commissioners hearings was published in the *Oregonian* newspaper.
2. *Goal 2. Land Use Planning.* The proposed Comprehensive Plan amendments do not propose to change the county's land use planning process.
3. *Goal 3. Agricultural Lands.* The proposed Comprehensive Plan amendments do not propose to change the county's implementing regulations for agricultural lands.
4. *Goal 4. Forest Lands.* The proposed Comprehensive Plan amendments do not propose to change the county's implementing regulations for forest lands.
5. *Goal 5. Open Spaces, Scenic and Historic Areas, and Natural Resources.* The proposed Comprehensive Plan amendments do not propose to change the county's implementing regulations for natural resource lands.

6. Goal 6. Air, Water & Land Resources Quality. The proposed Comprehensive Plan amendments do not propose to change the county's implementing regulations regarding air quality.
7. Goal 7. Areas Subject to Natural Disasters & Hazards. The proposed Comprehensive Plan amendments do not propose to change the county's implementing regulations for areas subject to natural disasters or hazards.
8. Goal 8. Recreational Needs. The proposed Comprehensive Plan amendments do not propose to change the county's implementing regulations for park lands.
9. Goal 9. Economy of the State. The proposed Comprehensive Plan amendments are consistent with Goal 9 because they do not propose to alter the supply of land designated for employment.
10. Goal 10. Housing. The proposed Comprehensive Plan amendments are consistent with Goal 10 because they do not propose to alter the supply of land designated for housing.
11. Goal 11. Public Facilities & Services. The proposed Comprehensive Plan amendments do not propose to change the county's Plan or implementing regulations regarding public facilities and services.
12. Goal 12: Transportation: The proposed Comprehensive Plan amendments do not propose to change the county's Plan or implementing regulations regarding transportation systems.
13. Goal 13. Energy Conservation The proposed Comprehensive Plan amendments do not propose to change the county's Plan or implementing regulations regarding energy conservation.
14. Goal 14. Urbanization. The proposed Comprehensive Plan amendments do not propose to change the county's implementing regulations for newly urbanizing areas. However, they further the state's urbanization goal by providing the five rural cities with a reasonable basis for which to plan for future urbanization.
15. Goal 15. Willamette River Greenway. The proposed Comprehensive Plan amendments do not propose to change the county's implementing regulations for the Willamette River Greenway.

This proposal is consistent with all applicable Statewide Planning Goals.

c. **State Statutes and Administrative Rules**

- a. **ORS 195.025 Regional coordination of planning activities.** This project was completed through a coordinated effort between the county and the five rural cities, as required by this statute. Coordination was completed through meetings, phone calls and email. Each of the cities has indicated support of this proposal, either verbally or in writing. Written comments are included in the Exhibits for this staff report. Documentation of coordination efforts are include in the **Clackamas County Rural Cities Population Coordination Background Report and Forecasts, Final Draft: February 14, 2013.**
- b. **ORS 195.036 Area population forecast; coordination.** This purpose of this proposal is to comply with this Statute by adopting a coordinated 20-year coordinated population forecast for the county's five rural cities.
- c. **OAR 660-024-0030 Population Forecasts**
 - a. **OAR 660-024-0030(1).** *Counties must adopt and maintain a coordinated 20-year population forecast for the county and for each urban area within the county consistent with statutory requirements for such forecasts under ORS 195.025 and 195.036. Cities must adopt a 20-year population forecast for the urban area consistent with the coordinated county forecast, except that a metropolitan service district must adopt and maintain a 20-year population forecast for the area within its jurisdiction. In adopting the coordinated forecast, local governments must follow applicable procedures and requirements in ORS 197.610 to 197.650 and must provide notice to all other local governments in the county. The adopted forecast must be included in the comprehensive plan or in a document referenced by the plan.*

This purpose of this proposal is to adopt a coordinated 20-year coordinated population forecast for the county's five rural cities. The procedures outlined in ORS.610 and 197.650 were followed and the appropriate notice was given for the adoption of the proposal. The adopted forecast will be in both the county's' Comprehensive Plan and a document referenced by the Plan.

- b. **OAR 660-024-0030(2).** *The forecast must be developed using commonly accepted practices and standards for population forecasting used by professional practitioners in the field of demography or economics, and must be based on current, reliable and objective sources and verifiable factual information, such as the most recent long-range forecast for the county published by the Oregon Office of Economic Analysis (OEA). The forecast must take into account documented long-term demographic trends as well as recent events that have a reasonable likelihood of changing historical trends. The population forecast is an estimate which,*

although based on the best available information and methodology, should not be held to an unreasonably high level of precision.

The forecasts in this proposal were developed using commonly accepted practices and standards. The basis for the coordinated forecasts was generated by Metro’s Metroscope model, a widely recognized and respected economic and demographic model used for regional land use and transportation planning. These forecasts were analyzed against local trends, zoning, and recent events identified in each individual city. Some revisions were made to the Metro forecasts based on this “local knowledge.”

The forecasts in this proposal are consistent with county-wide forecasts produced by both Metro and the Oregon Office of Economic Analysis (OEA). As noted in the Clackamas County Rural Cities Population Coordination Background Report and Forecasts, Final Draft: February 14, 2013, the Metro and OEA county-wide forecasts are consistent with each other and the latest review draft OEA forecast is only nominally different than the Metro forecast being used in this proposal.

This proposal is consistent with all applicable State Statutes and Administrative Rules.

SUMMARY AND RECOMMENDATION

Based upon the findings in this report, the proposed Comprehensive Plan text amendments satisfy all applicable Statewide Planning Goals, state statutes and administrative rules, and all applicable policies found in the county’s Comprehensive Plan.

Based upon the Findings in this report, staff from the Planning & Zoning Division recommends approval of the Comprehensive Plan amendments to adopt the 2012 – 2032 population forecasts for the county’s five rural cities, as proposed in ATTACHMENT A.

ATTACHMENTS

A. Proposed Clackamas County Comprehensive Plan amendments

1. Chapter 4 (Land Use) text amendments
2. Appendix B

B. Clackamas County Rural Cities Population Coordination Background Report and Forecasts, Final Draft: February 14, 2013

EXHIBIT LIST

Exhibit 1. Email from S. Hansen

Exhibit 2. Letter from city of Sandy

Exhibit 3. Letter from city of Canby

Exhibit 4. Notices and list of noticed parties



PLANNING COMMISSION
MINUTES

February 25, 2013
6:30 p.m.

Commissioners present: Norman Andreen, Barbara Coles, John Drentlaw, Mark Meek, Brian Pasko, James Perrault, Thomas Peterson, Tammy Stevens and Michael Wagner
Staff present: Mike McCallister, Martha Fritzie, Darcy Renhard

1. Commission Chair Andreen called the meeting to order at 6:30 p.m.
2. Commission Chair Andreen asked if there was any member of the audience who wished to provide comment on an item not on the agenda. There were no public comments.
3. The agenda includes a public hearing on ZDO-242, which is a legislative text amendment to the Comprehensive Plan, Chapter 4 to adopt population coordination for rural cities (Barlow, Canby, Estacada, Molalla, and Sandy).

Martha Fritzie explained that the County is the coordinating body for the rural cities, which is why this project is being done. It allows these rural cities to better plan for future growth and more accurately determine urban growth boundaries. She explained the methodology used as the basis for determining the projections, directing the Commissioners' attention to the transportation area zones and where growth was projected within each of these zones. Four out of the five cities have tended toward becoming "bedroom communities" and have responded by increasing their focus on economic growth. She reminded the Planning Commission that we are not recommending adoption of the countywide Metro forecasts today, or the Metro UGB forecasts—only the forecasts for the five cities discussed.

The project work began about a year ago through a grant from the DLCD.

Since the Portland Metro UGB has been kept fairly tight (because of multiple factors), approximately 25% of recent growth within the county has taken place in three of these rural cities (Canby, Estacada, and Molalla). Martha explained the growth trends for each of the five cities and how this accounts for the projected future growth numbers.

Barlow is a small city which does not expect to grow very much, mainly due to space limitations and because everything in the city is on septic. They are projected to grow at a fairly flat rate, from 136 people currently to 146 people in 2032.

The City of Canby has experienced strong growth over the past decade and has been very proactively seeking opportunities for economic development. Their 2032 population projection is 26,730, which is 9,900 more people than what they have now.

Estacada's population growth rate has gone up and down quite a bit, which is typical of smaller jurisdictions. Their population projection for 2032 is 4,345, which reflects a growth of about 1,500 people. Interestingly, they were the only city with more building permits issued at the end of the last

decade than prior to the housing boom. They are also trying to encourage more housing and employment development within the city.

Molalla is projected to grow to 12,760 people in 2032, which is an increase of just over 4,200. One reason that adjustments were made to the Metro numbers for Molalla is because Metro restricted their model based on limited available residential land. We made the assumption that Molalla can expand its urban growth boundary if there is a need.

The City of Sandy is very proactive in trying to draw new residents, and has been successful because it is a very attractive area. The numbers for Sandy were adjusted to project a population of 17,960 in 2032. The original projection was 17,970, but staff found that this number was based on the 2010 figure from PSU rather than the US Census figure. The report should reflect the correct 2032 forecast number of 17,960.

Martha provided an explanation of which Comprehensive Plan goals and policies, state statutes, statewide planning goals, and administrative rules apply to population forecasting. In assessing the proposal, staff has determined that it is consistent with and is in compliance with all of the various rules, standards, and requirements.

Staff is recommending that the Planning Commission recommend to the BCC approval of ZDO-242, with the noted change to the numbers for the City of Sandy.

Commissioner Coles asked if the 20-year projection requirement indicates which year you have to project from. Martha responded that it does not, but the grant that we received from DLCDC specifies projecting from 2012-2032.

Commissioner Andreen asked if the Villages at Government Camp and Welches were included in the growth projections for Sandy. Martha replied that the actual numbers were not included in Sandy's growth projection, but that a reasonable assumption had been made that some of the growth projected in those areas would in reality take place in Sandy.

The Planning Commission commended Martha on a very well-written, clear and concise report.

Commissioner Wagner moved to recommend approval of ZDO-242: Rural Cities Population Coordination to the BCC with the requested change to the numbers for Sandy. Commissioner Meek seconded the motion. *Ayes=9, Nays=0. Motion passes.*

4. Other business:
 - a. Mike McCallister reminded the Commissioners that we are in the midst of recruiting for the two positions whose term expires at the end of April. Commissioner Pasko confirmed that he will be reapplying. Commissioner Coles stated that she will not be reapplying.
5. Minutes: Commissioner Wagner moved to approve the minutes from the November 26th meeting as submitted. Commissioner Stevens seconded the motion. *Ayes=9, Nays=0. Motion passes.*
6. Schedule Review: Mike McCallister provided an overview of the schedule for the next few months. Commissioner Wagner will not be available on the 11th of March as he has a conflicting TSP meeting. Staff will discuss possibly shifting the PC meetings for March and let the Commissioners know what the results are.
7. There being no further business, the meeting was adjourned at approximately 7:50 p.m.

Exhibits List for ZDO 242			Last updated 03-12-2013
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Date	Number	Who Submitted	Brief Summary
Jan 28 2013	1	Susan Hansen	Email outlining concerns with some of the information in the background and forecasts report
Jan 30 2013	2	Tracy Brown, Planning Director City of Sandy	Letter in support of the proposed forecast; recommends adoption
Feb 07 2013	3	Bryan Brown, Planning Director City of Canby	Letter in support of the proposed forecast
Feb 14 2013	4	Clackamas County Planning & Zoning Division	DLCD and other notices; notice mailing list
Feb 20 2013	5	Mark Gervasi, Interim City Manager City of Molalla	Letter in support of the proposed forecast
Feb 21 2013	6	Mia Nelson 1000 Friends of Oregon	Letter in support of the proposed forecasts/proposal

Fritzie, Martha

EXHIBIT 1
ZDO 242
01/28/13

From: Susan Hansen [foxglovefarm@inbox.com]
Sent: Monday, January 28, 2013 11:42 AM
To: Fritzie, Martha
Cc: Susan Heublein; Pat Ross; Joan Zuber; Carol Westergreen; goldincheese@inbox.com
Subject: Phone call follow-up/ population projection for Molalla/ Urban Reserve rules

Dear Martha,

Thanks for the call back.

Per our discussion I am concerned about:

Quoting any firm # of buildable acres in Molalla seems very questionable. There was no approved buildable lands inventory in the comp plan hearings. There is great opportunity for infill in Molalla and I added a large photo essay of "low development to land value" sites in the city limits to the comp plan hearing files. Even Winterbrook, at a meeting in summer 2007, told the City Council that it had "far too much" land zoned commercial and industrial. Some kind of proof and/or adjustment would be needed to prove "buildable land". I suggest that be removed as hearsay.

Given peak oil, the disinterest in long commutes (the long distance to family wage jobs for Molalla's residents), the huge loss in property values because Molalla had one of the highest rates of foreclosures in the nation (as high as one out of every 189 houses in some months), Molalla's extremely low quality of life (due to insolvency and poor planning, Molalla has not provided adequate parks and can't fix roads or infrastructure) and the proven trend for working families to live in walkable, bikeable Metro areas that have multi-modal transportation choices, the trends are clearly against growth in places like Molalla. Those clear trends should be noted as a balancing factor pointing to low growth in Molalla.

Molalla's TEAM for Economic Development, an EID, was just dissolved as being "improperly formed" when it was re-upped in 2010. It may have been "improper" the first 5 years as well. In any case, Molalla now has no economic committee in place so any reference to something like that isn't valid. It will be a struggle for Molalla to "properly form" an EID because the struggling remaining businesses are resistive.

There is NO valid Downtown Master Plan in place so it is false to reference that. As I mentioned, that plan was written in 2007 and is dated as such. ODOT's Sonya Kazen told me that it had about a 5 year shelf life to be adopted. LUBA recently rejected a commercial/residential mixed use appeal because it was based on the zoning in that unadopted Downtown Master Plan. So please don't assume that plan is valid - it may be obsolete by the time Molalla can get around to trying to adopt a revised comp plan.

I like the Urban Reserve rules where a city must balance jobs to residential - that's something that is way off balance in Molalla and unlikely to change, given the cost to bring goods and services in and out on bad two lane state highways. Highway 213 is rated D- and there are no transportation plans or money to improve it and Highway 211 isn't any better. I think a city must also show ability to afford to update and improve old infrastructure (in Molalla's case, pave roads, provide sidewalks and bike routes, provide storm drains, etc) and to afford to build new infrastructure before it can expand in any way or ask for urban reserves.

Given the state of city finances in Molalla, it can't afford to maintain the infrastructure it already has. I understand archaic concrete/asbestos water pipes serve the south end of Molalla - that would limit develop south to the exception lands. Also, there is limited power - a new power station would need to be built if substantial growth or business development occurred.

Most important are water rights - there is about enough capacity, as I understand it, for Molalla to be a city of 12,000 but not much more, since Molalla and Canby both draw out of the Molalla River for their drinking water. I think analysis of water supply issues will need to be a big consideration in the growth of cities.

Do I need to put this into a more formal doc or should I wait to see your next version of these plans? Thanks for listening to my input. I just don't want to see hearsay left over from Molalla's failed comp plan presented in any way as fact in your analysis. That's not how I believe County does its planning.

Sincerely,
Susan Hansen

[Spam](#)

[Not spam](#)

[Forget previous vote](#)



EXHIBIT 2
ZDO 242
01/29/13

January 30, 2013

Clackamas County Planning Commission
150 Beaver Creek Rd.
Oregon City, OR 97045

RE: File No. ZDO-242 (Coordinated Population Forecasts)

Please enter this letter into the record regarding the proposed Comprehensive Plan Text Amendment: Coordinated Population Forecasts. The current review draft identifies a 2.8 percent annual growth rate for the city of Sandy which is well below our historical growth rate of 4.3 percent over the last several decades. Despite this difference we are supportive of the proposed number and urge adoption of the recommendation as presented.

The city of Sandy is very appreciative of staff's work on this project and the final product will greatly assist in our future long range planning efforts.

Please do not hesitate contacting me at 503-668-4886 or tbrown@cityofsandy.com if you have any questions.

Sincerely,


Tracy Brown
Planning Director
503-668-4886

Phone 503-668-5533 • Fax 503-668-8714

39250 Pioneer Boulevard • Sandy, OR 97055 • www.cityofsandy.com

The City of Sandy is an equal opportunity employer and does not discriminate on the basis of race, religion, sex or disability.

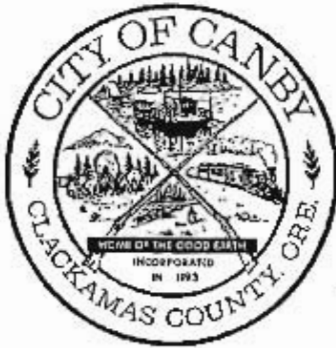


EXHIBIT 3
200 242
02/07/13

City of Canby

Planning and Development Services

February 7, 2013

Clackamas Board of County Commissioners
2051 Kaen Road
Oregon City, OR 97045

RE: Adoption of 20-year Coordinated Population Forecasts for Rural Cities


Dear County Commissioners:

This letter is intended to express my appreciation on behalf of the City of Canby to Clackamas County and more specifically to senior planner Martha Fritzie and other County planning staff for securing grant funding and their work to complete the Clackamas County Rural Cities Coordinated 20-Year Population Forecast for 2032. The coordinated approach for determining this much needed forecast was appreciated and Canby's participation in the process solicited and our interests well accounted for in the final forecast. The incorporation and extrapolation from Metro's 2035 population forecast provided a well-grounded basis for the coordination work between the rural cities involved.

A continuing strong population growth for Canby is forecasted based on employment opportunities available, primarily expected to be fueled by our Pioneer Industrial Park and the infrastructure investments that have been made and will continue to be made as a result of the Canby Urban Renewal District and Agency actions within the associated urban renewal district.

The City of Canby stands ready to embrace the forecast and plan for needed housing right here in Canby to better accommodate the needs of a growing employment base. Thanks again for the work the County has done to provide this much needed tool for planning Canby's future.

Respectfully,


Bryan Brown
Planning Director

DLCD Notice of Proposed Amendment or
 Periodic Review work Task Proposed Hearing or
 Urban Growth Boundary or Urban Reserve Area

THIS COMPLETED FORM, including the text of the amendment and any supplemental information, **must be submitted to DLCD's Salem office at least 35 DAYS PRIOR TO THE FIRST EVIDENTIARY HEARING** ORS 197.610, OAR 660-018-0020 and OAR 660-025-0080

Jurisdiction: **Clackamas County**

Date of First Evidentiary Hearing: **02/25/2013**

Local File Number: **ZDO-242**

Date of Final Hearing: **03/21/2013**

Is this a **REVISION** to a previously submitted proposal? No Yes Original submittal date:

- | | |
|--|--|
| <input checked="" type="checkbox"/> Comprehensive Plan Text Amendment(s) | <input type="checkbox"/> Comprehensive Plan Map Amendment(s) |
| <input type="checkbox"/> Land Use Regulation Amendment(s) | <input type="checkbox"/> Zoning Map Amendment(s) |
| <input type="checkbox"/> Transportation System Plan Amendment(s) | <input type="checkbox"/> Urban Growth Boundary Amendment(s) |
| <input type="checkbox"/> Periodic Review Work Task Number _____ | <input type="checkbox"/> Urban Reserve Area Amendment(s) |
| <input type="checkbox"/> Other (please describe): | |

Briefly Summarize Proposal in plain language IN THIS SPACE (maximum 500 characters):

Legislative Comprehensive Plan text amendment to adopt 20-year coordinated population forecasts for Clackamas County's five rural cities: Barlow, Canby, Estacada, Molalla, and Sandy. These forecasts are consistent with the applicable statutory requirements of ORS 195.025 and 195.036.

Has sufficient information been included to advise DLCD of the effect of proposal? Yes, text is included

Are Map changes included: minimum 8½"x11" color maps of Current and Proposed designations. Yes, Maps included

Plan map change from: _____ To: _____

Zone map change from: _____ To: _____

Location of property (Site address **and** TRS):

Previous density range: _____ New density range: _____ Acres involved: _____

Applicable statewide planning goals:

- | | | | | | | | | | | | | | | | | | | |
|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Is an exception to a statewide planning goal proposed? YES NO Goal(s):

Affected state or federal agencies, local governments or special districts (It is jurisdiction's responsibility to notify these agencies).

Cities of Barlow, Canby, Estacada, Molalla, and Sandy; DLCD; ODOT; Metro

Local Contact person (name and title): **Martha Fritzie, Senior Planner**

Phone: **503-742-4529**

Extension:

Address: **150 Beavercreek Rd**

City: **Oregon City**

Zip: **97045-**

Fax Number: **503-742-4550**

E-mail Address: **mfritzie@clackamas.us**

- FOR DLCD internal use only -

DLCD File No _____

SUBMITTAL INSTRUCTIONS

This form must be submitted to DLCD at least 35 days prior to the first evidentiary hearing.
per ORS 197.610, OAR Chapter 660, Division 18 and OAR Chapter 660, Division 25

1. This Form 1 must be submitted by a local jurisdiction. Individuals and organizations may not submit a comprehensive plan amendment for review or acknowledgment.
2. When submitting a plan amendment proposal, please print a completed copy of **Form 1** on light **green paper if available**.
3. **Text:** Submittal of a proposed amendment to the text of a comprehensive plan or land use regulation must **include the text** of the amendment and any other information necessary to advise DLCD of the effect of the proposal. "Text" means the specific language proposed to be amended, added to or deleted from the currently acknowledged plan or land use regulation. A general description of the proposal is not adequate. **Please submit Form 1 with ALL supporting documentation.**
4. **Maps:** Submittal of a proposed map amendment must also include a map of the affected area showing existing and proposed plan and zone designations. The map must be legible, in color if applicable and printed on paper no smaller than 8½ x 11 inches. Please provide the specific location of property: include the site address (es) and Township/Range/Section/tax lot number. Include text regarding background, justification for the change, and the application if there was one accepted by the local government.
5. **Exceptions:** Submittal of proposed amendments that involve a goal exception must include the proposed language of the exception.
6. Unless exempt by [ORS 197.610\(2\)](#), proposed amendments must be submitted to DLCD's Salem office at least 35 days before the first evidentiary hearing on the proposal. The 35 days begins the day of the postmark, or, if submitted by means other than US Postal Service, on the day DLCD receives the proposal in the Salem Office. The first evidentiary hearing is typically the first public hearing held by the jurisdiction's planning commission on the proposal.
7. Submit **one paper copy** of the proposed amendment including the text of the amendment and any supplemental information and maps (for maps see # 4 above).
8. Please mail the proposed amendment packet to:

**ATTENTION: PLAN AMENDMENT SPECIALIST
DEPARTMENT OF LAND CONSERVATION AND DEVELOPMENT
635 CAPITOL STREET NE, SUITE 150
SALEM, OREGON 97301-2540**

9. **Need More Copies?** Please print forms on **8½ x11 green paper if available**. If you have any questions or would like assistance, please contact your DLCD regional representative or contact the DLCD Salem Office at (503) 373-0050 x238 or e-mail plan.amendments@state.or.us.

MEMORANDUM

TO: Community Planning Organizations, Hamlets, Villages and Other Interested Parties

FROM: Martha Fritzie, Senior Planner; Planning and Zoning Division

DATE: January 22, 2013

SUBJECT: File ZDO-242; Proposed Comprehensive Plan Text Amendment: Adoption of 20-year Coordinated Population Forecasts for the cities of Barlow, Canby, Estacada, Molalla and Sandy

Clackamas County is proposing amendments to the text of the Clackamas County Comprehensive Plan. Since these amendments may affect your community or area of interest, we want to give you and your organization the opportunity to review and comment on the proposed changes before or at public hearings scheduled in front of the Planning Commission on February 25, 2013, and in front of the Board of County Commissioners on March 20, 2013.

The proposed Comprehensive Plan text amendments would adopt 20-year population forecasts for the cities of Barlow, Canby, Estacada, Molalla and Sandy. The coordinated forecasts were completed to comply with ORS 195.036, which requires the all coordinating bodies within the state to establish and maintain 20-year coordinated forecasts for their cities. Clackamas County currently does not have such a forecast for its rural cities. Population forecasts for the County's urban cities are currently being coordinated by Metro.

These forecasts should have a significant effect on these cities' ability to plan for the future, including enabling them to:

- Better plan for future growth and maintain an appropriately-sized urban growth boundary;
- Make more efficient investments in their infrastructure;
- Make the process for a city to expand its UGB more efficient; and
- Be in compliance with state law.

Population forecasts for the 2012-2032 period were extrapolated from the 2035 forecasts generated for the County by Metro and were coordinated with each of the cities. The following forecasts are proposed for adoption into the Chapter 4 (Land Use) of the county's Comprehensive Plan:

City	2012 population	2032 population	<i>Net growth 2012-2032</i>	<i>AAGR 2012-2013</i>
Barlow	136	146	10	0.4%
Canby	16,820	26,730	9,910	2.3%
Estacada	2,845	4,345	1,500	2.1%
Molalla	8,532	12,760	4,228	2.0%
Sandy	10,411	17,970	7,559	2.8%

The Planning Commission public hearing will begin at 6:30 p.m., Monday, February 25, 2013, at the Development Services Building Auditorium, Rm. 115, 150 Beavercreek Rd., Oregon City, to consider these amendments. **You are invited to attend the hearing and present oral comments to the Planning Commission. Typically, written correspondence received at least one week prior to the hearing will be included in the Planning Commission packets. Written testimony received after that time will be emailed to the Planning Commission, or provided to the Planning Commission on the evening of the hearing.**

The Board of County Commissioners will consider the Planning Commission's recommendations on the proposed amendments beginning at 9:30 a.m., Wednesday, March 20, 2013, at the Public Services Building, Board of County Commissioners Hearing Room, 2051 Kaen Rd., Oregon City. **Once again, you are invited to attend the hearing and present oral comments to the Commissioners. The Board will consider all written testimony submitted to the Planning Commission and will accept additional written testimony up to, and on the day of, the hearing.**

For additional information regarding these proposed amendments, please contact Martha Fritzie at (503) 742-4529 or mfritzie@clackamas.us. The draft amendments are also available for review on the County web site at <http://www.clackamas.us/transportation/planning/zdoproposed.jsp>.

**NOTICE OF PUBLIC HEARINGS
SCHEDULED ON PROPOSED COMPREHENSIVE PLAN AMENDMENTS**

The Clackamas County Planning Commission and Board of Commissioners will hold public hearings to consider proposed amendments to Chapter 4 of the County's Comprehensive Plan. The proposed amendments would adopt 20-year coordinated population forecasts for the cities of Barlow, Canby, Estacada, Molalla and Sandy.

The amendments, File ZDO-242, are available at <http://www.clackamas.us/planning/zdoproposed.html> . The public may review and comment on the proposed amendments before and/or at the public hearings.

Planning Commission Public Hearing

6:30 p.m., February 25, 2013

Development Services Bldg Auditorium, Rm. 115, 150 Beaver creek Rd., Oregon City

Board of Commissioners Public Hearing

9:30 a.m., March 20, 2013

Board Hearing Room, Public Services Bldg, 2051 Kaen Rd., Oregon City

For more information: Martha Fritzie, 503-742-4529 or mfritzie@clackamas.us

COPY

April 25, 2013

Board of County Commissioner
Clackamas County

Members of the Board:

Approval of a Behavioral Health Services Agreement with Lutheran Community Services for
Outpatient Substance Abuse Services and Outpatient Mental Health Services

Purpose/Outcomes	This contractor provides outpatient substance abuse services and outpatient mental health services to Oregon Health Plan members capitated to Clackamas County.
Dollar Amount and Fiscal Impact	The contract has no upper limit; expenditures are controlled by Behavioral Health Division staff who pre-authorize and monitor services on an on-going basis.
Funding Source	Health Share of Oregon – No County General Funds are involved.
Safety Impact	None
Duration	Effective upon signature and terminates on December 31, 2013
Previous Board Action	The original contract was approved by the Board of County Commissioners on December 18, 2008 agenda item 121808-B8.
Contact Person	Cindy Becker, Acting Director–Behavioral Health Division – (503)650-5696
Contract No.	BH-97-12/13

BACKGROUND:


The Behavioral Health Division has partnered with Lutheran Community Services since 2007 to provide Outpatient Substance Abuse Services and Outpatient Mental Health Services.

This contract is effective upon signature and continues through December 31, 2013. This contract has been reviewed and approved by County Counsel.

RECOMMENDATION:

Staff recommends the Board approval of this contract and authorizes Cindy Becker, H3S Director to sign on behalf of Clackamas County.

Respectfully submitted,


Cindy Becker, Director

BEHAVIORAL HEALTH SERVICES AGREEMENT

This Behavioral Health Services Agreement is between Clackamas County acting by and through its Health, Housing and Human Services Department, Behavioral Health Division, hereinafter called "COUNTY" and LUTHERAN COMMUNITY SERVICES, hereinafter called "CONTRACTOR".

AGREEMENT

1.0 Engagement

COUNTY hereby engages CONTRACTOR to provide services as described in Exhibit B, Scope of Work, attached hereto and incorporated herein. This agreement sets forth the terms under which CONTRACTOR will contract with COUNTY to provide behavioral health services to Oregon Health Plan Medicaid recipients enrolled with Health Share of Oregon / Clackamas and residents of Clackamas County who are eligible for services as uninsured, indigent individuals.

2.0 Term

Services provided under the terms of this agreement shall commence upon **upon signature**. This agreement shall terminate **December 31, 2013** unless terminated by one or both parties as provided for in paragraph 6.0 below. This agreement may be renewed annually and amended by mutual written consent of both parties.

3.0 Compensation and Fiscal Records

3.1 Compensation. COUNTY shall compensate CONTRACTOR as specified in Exhibit C, Compensation and Payment, for satisfactorily performing contracted services. The payment shall be full compensation for work performed, for services rendered, and for all labor, materials, supplies, equipment, mileage, and incidentals necessary to perform the work and services.

3.2 Withholding of Contract Payments. Notwithstanding any other payment provision of this agreement, should CONTRACTOR fail to perform or document the performance of contracted services, COUNTY shall immediately withhold payments hereunder. Such withholding payment for cause may continue until CONTRACTOR performs required services or establishes to COUNTY'S satisfaction that such failure arose out of causes beyond the control, and without the fault or negligence, of CONTRACTOR.

3.3 Financial Records. CONTRACTOR and its subcontractors shall maintain complete and legible financial records pertinent to authorized Covered Services delivered and payments received. Such records shall be maintained in accordance with Generally Accepted Accounting Principles and/or other applicable accounting guidelines such as outlined in Office of Management and Budget circulars A-87, A-122 and A-133. Financial records and supporting documents shall be retained for at least five (5) years after final payment is made under this agreement or until all pending matters are resolved, whichever period is longer. If an audit of financial records discloses that payments to CONTRACTOR were in excess of the amount to which CONTRACTOR was entitled, CONTRACTOR shall repay the amount of the excess to COUNTY.

4.0 Manner of Performance

4.1 Compliance with Applicable Laws and Regulations, and Special Federal Requirements. CONTRACTOR shall comply with all Federal, State and local laws, rules and regulations applicable to work performed under this agreement, including, but not limited to, all applicable Federal and State civil rights and rehabilitation statutes, rules and regulations, and as listed in Exhibit F, Compliance with Applicable Law, attached hereto and incorporated herein. CONTRACTOR shall comply with OAR 410-120-1380, which establishes the requirements for compliance with Section 4751 of Omnibus Budget Reconciliation Act (OBRA) 1991 and ORS 127.649, Patient Self-Determination Act.

4.2 Subcontracts. CONTRACTOR shall not enter into any subcontracts for any of the work scheduled under this agreement without obtaining prior written approval from COUNTY. CONTRACTOR shall not be relieved of any of CONTRACTOR's obligations hereunder by virtue of any such subcontract, and shall remain directly responsible for compliance with all the terms of this agreement.

4.3 Independent Contractor. CONTRACTOR certifies that it is an independent contractor and not an employee or agent of County, State or Federal government. Responsibility for all taxes, assessments, and any other charges imposed upon employers shall be the solely the responsibility of CONTRACTOR.

4.4 Workers' Compensation. CONTRACTOR certifies that it is an insured employer for purposes of the Oregon Workers' Compensation law and maintains workers' compensation insurance as required by ORS 656.017, or qualifies for an exemption under ORS 656.126. CONTRACTOR shall maintain employer's liability insurance with limits of \$500,000 each accident, \$500,000 disease each employee, and \$500,000 each policy limit.

5.0 General Conditions

5.1 Indemnification. CONTRACTOR agrees to indemnify, save, hold harmless, and defend COUNTY, its officers, commissioners and employees from and against all claims and actions, and all expenses incidental to the investigation and defense thereof, arising out of actions, suits, claims or demand attributable in whole or in part to the acts or omissions of CONTRACTOR, and CONTRACTOR's officers, agents, and employees, in performance of this agreement.

CONTRACTOR shall defend, save, hold harmless and indemnify the State of Oregon, OHA and their officers, agents and employees from and against all claims, suits, actions, damages, liabilities, costs and expenses of whatsoever nature resulting from, arising out of, or relating to the activities or omissions of CONTRACTOR, or its agents or employees under this agreement.

If CONTRACTOR is a public body, CONTRACTOR's liability under this agreement is subject to the limitations of the Oregon Tort Claims Act.

5.2 Insurance. During the term of this agreement, CONTRACTOR shall maintain in force at its own expense each insurance noted below:

5.2.1 Commercial General Liability

Required by COUNTY Not required by COUNTY

CONTRACTOR shall obtain, at CONTRACTOR's expense, and keep in effect during the term of this agreement, Commercial General Liability Insurance covering bodily injury and property damage on an "occurrence" form in the amount of not less than \$2,000,000 per occurrence/\$4,000,000 general aggregate for the protection of COUNTY, its officers, commissioners, and employees. This coverage shall include Contractual Liability insurance for the indemnity provided under this agreement. This policy(s) shall be primary insurance as respects to the COUNTY. Any insurance or self-insurance maintained by COUNTY shall be excess and shall not contribute it.

5.2.2 Commercial Automobile Liability

Required by COUNTY Not required by COUNTY

CONTRACTOR shall also obtain at CONTRACTOR's expense, and keep in effect during the term of the agreement, "Symbol 1" Commercial Automobile Liability coverage including coverage for all owned, hired, and non-owned vehicles. The combined single limit per occurrence shall not be less than \$2,000,000.

5.2.3 Professional Liability

Required by COUNTY Not required by COUNTY

CONTRACTOR agrees to furnish COUNTY evidence of professional liability insurance in the amount of not less than \$2,000,000 combined single limit per occurrence/\$4,000,000 general annual aggregate for malpractice or errors and omissions coverage for the protection of COUNTY, its officers, commissioners and employees against liability for damages because of personal injury, bodily injury, death, or damage to property, including loss of use thereof, and damages because of negligent acts, errors and omissions in any way related to this agreement. COUNTY, at its option, may require a complete copy of the above policy.

5.2.4 Tail Coverage. If liability insurance is arranged on a "claims made" basis, "tail" coverage will be required at the completion of this contract for a duration of thirty-six (36) months or the maximum time period the CONTRACTOR'S insurer will provide "tail" coverage as subscribed, or continuous "claims made" liability coverage for thirty-six (36) months following the contract completion. Continuous "claims made" coverage will be acceptable in lieu of "tail" coverage provided its retroactive date is on or before the effective date of this contract.

5.2.5 Additional Insurance Provisions. All required insurance other than Professional Liability, Workers' Compensation, and Personal Automobile Liability insurance shall include "Clackamas County, its agents, officers, and employees" as an additional insured.

5.2.6 Notice of Cancellation. There shall be no cancellation, material change, exhaustion of aggregate limits or intent not to renew insurance coverage without 60 days written notice to the COUNTY. Any failure to comply with this provision will not affect the insurance coverage provided to COUNTY. The 60 days notice of cancellation provision shall be physically endorsed on to the policy.

5.2.7 Insurance Carrier Rating. Coverages provided by CONTRACTOR must be underwritten by an insurance company deemed acceptable by COUNTY. Insurance coverage shall be provided by companies admitted to do business in Oregon or, in the alternative, rated A- or better by Best's Insurance Rating. COUNTY reserves the right to reject all or any insurance carrier(s) with an unacceptable financial rating.

5.2.8 Certificates of Insurance. As evidence of the insurance coverage required by this agreement, CONTRACTOR shall furnish a Certificate of Insurance to COUNTY. No agreement shall be in effect until required certificates have been received, approved and accepted by COUNTY. The certificate will specify that all insurance-related provisions within the agreement have been complied with. A renewal certificate will be sent to COUNTY 10 days prior to coverage expiring.

5.2.9 Independent Contractor Status. The service or services to be rendered under this agreement are those of an independent contractor. CONTRACTOR is not an officer, employee or agent of COUNTY as those terms are used in ORS 30.265.

5.2.10 Primary Coverage Clarification. CONTRACTOR'S coverage will be primary in the event of a loss.

5.2.11 Cross Liability Clause. A cross-liability clause or separation of insureds condition will be included in all general liability, professional liability, and errors and omissions policies required by the agreement.

5.3 Governing Law: Consent to Jurisdiction. This agreement shall be governed by and construed in accordance with the laws of the State of Oregon. Any claim, action, or suit between COUNTY and CONTRACTOR that arises out of or relates to performance under this agreement shall be brought and conducted solely and exclusively within the Circuit Court for Clackamas County, State of Oregon. Provided,

however, that if any such claim, action or suit may be brought only in a federal forum, it shall be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. CONTRACTOR by execution of this agreement consents to the in personam jurisdiction of said courts.

5.4 Amendments. The terms of this agreement shall not be waived, altered, modified, supplemented, or amended, in any manner whatsoever, except by written instrument signed by CONTRACTOR and COUNTY.

5.5 Severability. If any term or provision of this agreement is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms or provisions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the agreement did not contain the particular term or provision held to be invalid.

5.6 Waiver. The failure of either party to enforce any provision of this agreement shall not constitute a waiver of that or any other provision.

5.7 Future Support. COUNTY makes no commitment of future support and assumes no obligation for future support for the activity contracted herein except as set forth in this agreement.

5.8 Oregon Constitutional Limitations. This agreement is expressly subject to the debt limitation of Oregon counties set forth in Article XI, Section 10 of the Oregon Constitution, and is contingent upon funds being appropriated therefore. Any provisions herein, which would conflict with such law, are deemed inoperative to that extent.

5.9 Public Contracting Requirements. Pursuant to the requirements of ORS 279B-020 and ORS 279B.220 through 279B.335 and Article XI, Section 10, of the Oregon Constitution, the following terms and conditions are made a part of this agreement:

5.9.1 CONTRACTOR shall:

- a. Make payments promptly, as due, to all persons supplying to CONTRACTOR labor or materials for the performance of the work provided for in this agreement.
- b. Pay all contributions or amounts due the Industrial Accident Fund from such CONTRACTOR or subcontractor incurred in performance of this agreement.
- c. Not permit any lien or claim to be filed or prosecuted against Clackamas County on account of any labor or material furnished.
- d. Pay to the Department of Revenue all sums withheld from employees pursuant to ORS 316.167.

5.9.2 If CONTRACTOR fails, neglects, or refuses to make prompt payment of any claim for labor or services furnished to CONTRACTOR or a subcontractor by any person in connection with this agreement as such claim becomes due, the proper officer representing Clackamas County may pay such claim to the person furnishing the labor or services and charge the amount of the payment against funds due or to become due CONTRACTOR by reason of this agreement.

5.9.3 CONTRACTOR shall pay employees at least time and a half for all overtime work performed under this agreement in excess of 40 hours in any one week, except for individuals under personal services contracts who are excluded under ORS 653.010 to 653.261 and the Fair Labor Standards Act of 1938 (29 U.S.C. 201 to 209) from receiving overtime.

5.9.4 CONTRACTOR shall promptly, as due, make payment to any person or partnership, association, or corporation furnishing medical, surgical, and hospital care or other needed care and attention incident to sickness and injury, to the employees of CONTRACTOR, of all sums that CONTRACTOR agrees to pay for the services and all monies and sums that CONTRACTOR

collected or deducted from the wages of its employees pursuant to any law, contract or agreement for the purpose of providing or paying for such services.

5.10 Integration. This agreement contains the entire agreement between COUNTY and CONTRACTOR and supersedes all prior written or oral discussions or agreements.

5.11 Federal Grant Requirements. CONTRACTOR shall comply with all applicable Federal Grant Requirements pursuant to 45 CFR Parts 74, 80, 84, 91, and 95.

5.12 Disclosure. CONTRACTOR shall comply with all disclosure requirements of 42 CFR 1002.3(a); 42 CFR 422 Subpart (B); and 42 CFR 457.900(a)(2).

5.13 Advance Directives. CONTRACTOR shall maintain written notices and procedures respecting Advance Directives in compliance with 42 USC Section 1396.(a)(57) and (w), 42 CFR 431.107(b)(4), and 42 CFR 431.107(b)(1) & (2); and 42 CFR Subpart J.

CONTRACTOR shall comply with 42 CFR Part 422.128 for maintaining written policies and procedures for Advance Directives. This includes compliance with OAR 410-120-1360 which establishes, among other requirements the requirements for compliance with Section 4751 of the Omnibus Budget Reconciliation Act of 1991 (OBRA) and ORS 127.649, Patient Self-Determination Act.

6.0 Termination

6.1 Termination Without Cause. This agreement may be terminated by mutual consent of both parties, or by either party upon ninety (90) business days notice, in writing and delivered by certified mail or in person.

6.2 Termination With Cause. COUNTY may terminate this agreement effective upon delivery of written notice to CONTRACTOR, or at such later date as may be established by COUNTY, under any of the following conditions:

6.2.1 The terms of the OHP Medicaid Demonstration Project are modified, changed or interpreted in such a way that the services are no longer allowable or appropriate for purchase under this agreement or are no longer eligible for the funding authorized by this agreement.

6.2.2 The termination, suspension or expiration of the Health Share of Oregon Participating Agreement.

6.2.3 COUNTY funding from Federal, State, or other sources is not obtained and continued at levels sufficient to allow for purchase of the indicated quantity of services. Alternatively, the parties may agree to modify the agreement to accommodate a reduction in funding.

6.2.4 COUNTY has evidence that CONTRACTOR has endangered or is endangering the health or safety of clients, staff or the public. CONTRACTOR shall ensure the orderly and reasonable transfer of care in progress with clients and shall work with COUNTY staff to accomplish same.

6.2.5 The lapse, relinquishment, suspension, expiration, cancellation or termination of any required license, certification or qualification of CONTRACTOR, or the lapse, relinquishment, suspension, expiration, cancellation or termination of CONTRACTOR's insurance as required in this agreement.

6.2.6 CONTRACTOR's filing for protection under United States Bankruptcy Code, the appointment of a receiver to manage CONTRACTOR's affairs, or the judicial declaration that CONTRACTOR is insolvent.

6.2.7 If CONTRACTOR fails to perform any of the other provisions of this agreement, or fails to pursue the work of this agreement in accordance with its terms, and after receipt of written notice from COUNTY, fails to correct such failures within ten (10) business days or such longer period as COUNTY may authorize.

6.3 Notice of Default. COUNTY may also issue written notice of default (including breach of contract) to CONTRACTOR and terminate the whole or any part of this agreement if CONTRACTOR substantially fails to perform the following specific provisions: Exhibit D(2)(A) Licenses and, Certification; Exhibit D(2)(C) Quality Assurance and Utilization Review; and Exhibit D(3) Recordkeeping and Reporting. The rights and remedies of COUNTY related to defaults (including breach of contract) by CONTRACTOR shall not be exclusive and are in addition to any other rights and remedies provided by law or under this agreement.

6.4 Transition. Any such termination of this agreement shall be without prejudice to any obligations or liabilities of either party already accrued prior to such termination. CONTRACTOR and COUNTY shall continue to perform all duties and obligations under this agreement with respect to clients under care of CONTRACTOR to the date of termination.

7.0 Notices

Any notice under this agreement shall be deemed received the earlier of the time of delivery of two (2) business days after mailing certified and postage prepaid through the U.S. Postal Service addressed as follows:

If to CONTRACTOR:

Lutheran Community Services
605 SE Cesar Chavez Boulevard
Portland, OR 97214


If to COUNTY:

Clackamas County Behavioral Health Division
2051 Kaen Road, # 367
Oregon City, OR 97045

This agreement consists of seven (7) sections plus the following attachments, which by this reference are incorporated herein:

Exhibit A	Definitions
Exhibit B	Compensation and Payment
Exhibit C	Scope of Work
Exhibit D	Performance Standards
Exhibit E	Fraud and Abuse
Exhibit F	Compliance with Applicable Law

LUTHERAN COMMUNITY SERVICES

By: 
Roberta Nestaas, President/CEO
3-7-13

Date
605 SE Cesar Chavez Boulevard
Street Address
Portland, Oregon 97214
City / State / Zip
(503)231-7480 / (503)731-9574
Phone / Fax

CLACKAMAS COUNTY

Commissioner: Charlotte Lehan, Chair
Commissioner: Jim Bernard
Commissioner: Jamie Damon
Commissioner: Ann Linger
Commissioner: Paul Savas

Signing on Behalf of the Board:

Cindy Becker, Director
Health, Housing, and Human Services Department

Date

EXHIBIT A
DEFINITIONS

Whenever used in this Behavioral Health Services Agreement, the following terms shall have the meanings set forth below:

"Agreement": this Behavioral Health Services Agreement between COUNTY and CONTRACTOR for the provision of services.

"CCO": means a corporation, governmental agency, public corporation that is certified as meeting the criteria adopted by the Oregon Health Authority under ORS 414.625 to be accountable for care management and to provide integrated and coordinated health care for each of the organization's members.

"Client": an individual accessing publicly funded behavioral health services who is either an OHP Member or is determined eligible for services as an uninsured, indigent individual.

"Covered Services": medically appropriate services specified in OAR 410-141-3120, "Operations and Provision of Health Services" and limited in accordance with OAR 410-141-3420, "Billing and Payment" for OHP Members. The term "Covered Services" may be expanded, limited, or otherwise changed pursuant to the Clackamas County Health Share of Oregon / Clackamas Participation Agreement and OARs. Covered Services may also refer to authorized services provided to uninsured, indigent clients.

"DMAP": the State of Oregon, acting by and through its Department of Human Services, Division of Medical Assistance Programs.

"Health Share of Oregon": a Coordinated Care Organization (CCO) serving Oregon Health Plan enrollees of Clackamas, Multnomah and Washington Counties.

"OAR": Oregon Administrative Rules duly promulgated by DMAP and OHA and as amended from time to time.

"OHA": the State of Oregon, acting by and through its Oregon Health Authority.

"OHP Member": an individual found eligible by a division of the Oregon Department of Human Services to receive services under the OHP (Oregon Health Plan) Medicaid Demonstration Project or State Children's Health Insurance Program and who is enrolled with COUNTY as Health Share of Oregon / Clackamas.

"Third Party Resources": any individual, entity, or program that is, or may be, liable to pay all or part of the cost of any Covered Service furnished to an OHP Member, including but not limited to: private health insurance or group health plan; employment-related health insurance; medical support from absent parents; workers' compensation; Medicare; automobile liability insurance; other federal programs such as Veteran's Administration, Armed Forces Retirees and Dependent Act, Armed Forces Active Duty and Dependents Military Medical Benefits Act, and Medicare Parts A and B; another state's Title XIX, Title XXI or state-funded Medical Assistance Program; and personal estates.

"Valid Claim": an invoice, in the form of a CMS 1500 claim form, submitted for payment of covered health services rendered to an eligible client that is submitted within the required 120 days from the date of service or discharge and that can be processed without obtaining additional information from the provider of the service or from a third party. A valid claim is synonymous with the federal definition of a clean claim as defined in 42 CFR 447.45(b).

EXHIBIT B

SCOPE OF WORK

CONTRACTOR agrees to provide medically necessary services as described below when authorized by COUNTY's treatment authorization process. CONTRACTOR shall provide services in accordance with OAR 410-141-3120 "Operations and Provision of Health Services"; OAR 410-141-3420 "Billing and Payment"; OAR 309-032-1500 through 1565 "Integrated Services and Supports Rules", and any other administrative rules to which CONTRACTOR is subject, as such rules may be amended from time to time. Services provided are to be within the scope of CONTRACTOR's licenses and certification, and the licenses, certifications and training of its employed and contracted staff providing direct services under this agreement.

1. Outpatient Substance Abuse Services

Treatment services provided to individuals with alcohol or other drug use disorders and their family members. Services may include assessment; treatment and discharge planning; individual, group and family therapy; pharmacotherapy; case management; peer delivered services and supports. Services are provided consistent with Level I or Level II of the ASAM PPC-2R.

2. Outpatient Mental Health Services

Treatment services directed toward ameliorating symptoms of a mental health disorder and/or maintaining stability and functional autonomy for individuals with severe and persistent mental illness. Outpatient services are specific in targeting the symptoms or problem being treated. Services may include assessment; treatment and discharge planning; individual, family and group therapy; psychiatric evaluation; medication management; case management; skills training; peer delivered services and supports. Clients may receive an outpatient service while simultaneously participating in a higher level of care. CONTRACTOR shall provide a responsive, 24-hour, seven day per week coverage system to ensure access to services.

3. Determination of Level of Care

CONTRACTOR shall administer the Early Childhood Service Intensity Instrument, the Child and Adolescent Service Intensity Instrument or the Level of Care Utilization System to establish the appropriate level of care and to assist with treatment planning of mental health services. CONTRACTOR shall administer the American Society of Addiction Medicine Patient Placement Criteria for the Treatment of Substance-related Disorders, Second Edition, Revised to establish the appropriate level of care and to assist with treatment planning of substance abuse services. CONTRACTOR shall maintain the instrument administered as part of the clinical record and shall make the instrument available upon request by COUNTY.

4. Clinical Guidelines

CONTRACTOR shall adopt clinical guidelines that inform behavioral health practitioners, clients, family members and advocates with evidence-based information about mental illness and appropriate treatment options. Clinical guidelines should be based on a systematic evaluation of research evidence; be designed to assist, rather than dictate, clinical decision-making; and are to be applied on a case-by-case basis. Such guidelines should provide recommendations for appropriate care based on scientific evidence and professional consensus; support for professional standards, quality improvement activities and education; and a basis for comparing current practice to evidence-based best practices. CONTRACTOR shall make such guidelines available to COUNTY upon request.

5. Outcome Measure

CONTRACTOR shall adopt the use of a measure of clinical outcomes that demonstrates a change in client status following an episode of treatment. The measurement tool adopted shall identify changes in symptoms, functioning, quality of life, adverse events or satisfaction. CONTRACTOR shall make information about outcome measures used available to COUNTY upon request.

6. Coordination of Care

- a. CONTRACTOR shall provide coordination and integration of services with physical health care providers and chemical dependency providers as medically appropriate and within the Health Insurance Portability and Accountability Act (HIPAA) 45 CFR 164 and 42 CFR Part 2 Substance Abuse Confidentiality Regulations.
- b. CONTRACTOR shall coordinate with COUNTY on referral of clients to specialty behavioral health services or to a higher intensity of service. Specifically:
 - (1) CONTRACTOR shall coordinate with COUNTY on both admission and discharge of clients to psychiatric acute care or sub-acute psychiatric care. CONTRACTOR shall coordinate with COUNTY and the acute or sub-acute care provider on discharge planning and the development of community resources to aid in the timely discharge and community placement of the client. CONTRACTOR shall assure an appointment with an appropriate provider within seven (7) days of discharge from acute care, sub-acute care or psychiatric residential treatment care.
 - (2) CONTRACTOR shall coordinate with COUNTY on referral of clients to crisis respite services, particularly as those services are used to divert the admission of the client to acute care.
 - (3) CONTRACTOR shall refer clients for a Level of Service Intensity Determination Screening when a higher intensity of service appears warranted.
 - (4) CONTRACTOR shall coordinate with COUNTY to obtain Long Term Care Determination for appropriate clients.

7. Standards of Care

COUNTY promotes resilience in and recovery of the clients it serves. COUNTY supports a system of care that promotes and sustains a client's recovery from a mental health condition by identifying and building upon the strengths and competencies within the person to assist them in achieving a meaningful life within their community. Consistent with these values, CONTRACTOR shall:

- a. Provide services in a manner that assures continuity and coordination of the health care services provided to each client;
- b. Accept clients for treatment on the same basis that CONTRACTOR accepts other clients and render services to clients in the same manner as provided to CONTRACTOR's other clients. CONTRACTOR shall not discriminate against clients because of source of payment, race, gender, national origin, ancestry, religion, marital status, sexual orientation, age or diagnosis;
- c. Conduct its practice and treat all clients using that degree of care, skill and diligence which is used by ordinarily careful providers in the same or similar circumstances in the provider's community or a similar community (see ORS 677.095);
- d. Ensure that clients are served in the most normative, least restrictive, least intrusive and most cost effective level of care appropriate to their diagnosis and current symptoms, degree of impairment, level of functioning, treatment history, and extent of family and community supports;

- e. Advise or advocate on behalf of clients in regard to treatment options, without restraint from COUNTY;
- f. Provide clients with access to services without undue delay and as soon as necessary in light of the member's mental health condition. CONTRACTOR shall comply with access standards as set forth in the Health Share of Oregon / Clackamas Participation Agreement and OAR 410-141-3220 "Accessibility";
- g. Ensure that all personnel providing services to clients under this agreement are properly trained and qualified to render the services they provide. CONTRACTOR shall arrange for continuing education of personnel rendering services under this agreement as necessary to maintain such competence and satisfy all applicable licensing, certification or other regulatory requirements; and
- h. Maintain facilities and equipment appropriate for provision of services to clients of a type and quality consistent with administrative rules promulgated by the State of Oregon Department of Human Services and the Americans with Disabilities Act.

EXHIBIT C

COMPENSATION AND PAYMENT

1. Compensation

CONTRACTOR shall be reimbursed at the COUNTY reimbursement rates in effect as of the date of service or billed charges, whichever is less.

2. Usual and Customary Charges

CONTRACTOR shall bill COUNTY according to their Usual and Customary fee schedule. CONTRACTOR shall base their Usual and Customary charges on a cost study that is updated annually.

3. Method of Payment

To receive payment CONTRACTOR shall submit a CMS 1500 claim form to COUNTY's Third Party Administrator, Performance Health Technology Ltd (PH Tech) within 120 calendar days of the date of service in accordance with OAR 410-141-3420, "Billing and Payment". Claims may be submitted to PH Tech in either paper or electronic format.

PH Tech shall pay CONTRACTOR on behalf of COUNTY, by the 45th business day after a valid claim is received, fee-for-service payments as specified in section 1 above. COUNTY shall have no obligation to make payment to CONTRACTOR if CONTRACTOR fails to obtain a valid authorization to provide services, fails to verify eligibility for Covered Services and the individual is not an eligible client on the date of service, if the services provided are not Covered Services, or if CONTRACTOR fails to submit fee-for-service bills within 120 calendar days of the date of service. The timely filing requirement is extended to 18 months when there is a Third Party Resource as the primary payor and to 12 months when Medicare is primary.

4. Non-Covered Services

CONTRACTOR shall follow OAR 410-141-3420, "Billing and Payment", when submitting fee-for-service claims for services provided to OHP Members that are not Covered Services.

5. Payment in Full

Except as expressly provided below, payments to CONTRACTOR made by COUNTY for services provided under the terms of this agreement shall constitute payment in full. OAR 410-141-3420, "Billing and Payment"; CONTRACTOR shall not bill, charge, seek compensation, remuneration or reimbursement from, or have any recourse against OHA or any client for services contracted hereunder, either during the term of this agreement or at any time later, even if COUNTY becomes insolvent. This provision shall not prohibit collection for non-covered services that may be the responsibility of the client or any permitted co-pays, co-insurance, deductibles or any other cost sharing, if any and as applicable. CONTRACTOR may bill and collect separately for those costs which are lawfully the responsibility of the client. When combined with all sources of payment, COUNTY's payment to CONTRACTOR shall not exceed the reimbursement amount in effect as of the date of service.

6. Overpayments

Any payments made by COUNTY to which CONTRACTOR is not entitled under the terms of this agreement shall be considered an overpayment and shall be refunded by CONTRACTOR at the request of COUNTY, in accordance with OAR-410-120-1280, "Billing" and OAR 410-120-1397,

"Recovery of Overpayments to Providers – Recoupments and Refunds", provided that the request for refund is made within twelve (12) months from the date of payment from COUNTY to CONTRACTOR.

7. Third Party Resources and Coordination of Benefits

Pursuant to the Health Share of Oregon / Clackamas Participation Agreement, COUNTY is the payer of last resort when there is other insurance or Medicare in effect. CONTRACTOR shall bill and collect from liable third party resources prior to billing COUNTY. If both the third party resource and COUNTY reimburse CONTRACTOR for the same service, COUNTY shall be entitled to a refund for the exact amount of duplicate payment received by CONTRACTOR.

If CONTRACTOR has knowledge that a client has third-party health insurance or health benefits, or that either client or CONTRACTOR is entitled to payment by a third party, CONTRACTOR shall immediately so advise COUNTY.

Pursuant to OAR 410-141-3160, "Integration and Care Coordination", COUNTY reserves the right to coordinate benefits with other health plans, insurance carriers, and government agencies. COUNTY may release medical information to such other parties as necessary to accomplish the coordination of benefits in conformity with the Health Insurance Portability and Accountability Act (HIPAA) 45 CFR 164 and 42 CFR Part 2.. Coordination of benefits shall not result in compensation in excess of the amount determined by this agreement, except where State laws or regulations require the contrary.

8. Pay for Performance

COUNTY may offer to CONTRACTOR the opportunity to participate in a Pay for Performance program. Such a program will be designed to encourage quality improvement and client focused care and may include financial incentives for achievement of performance targets. The Pay for Performance program will be subject to funding availability. CONTRACTOR will not be eligible to receive performance payments during any time period CONTRACTOR is out of compliance with the terms and conditions of this agreement.

EXHIBIT D

PERFORMANCE STANDARDS

1. Interpretation and Administration of Agreement

CONTRACTOR acknowledges that this agreement between COUNTY and CONTRACTOR is subject to the underlying Health Share of Oregon / Clackamas Participation Agreement between COUNTY and Health Share of Oregon, the Intergovernmental Agreement between COUNTY and the Oregon Health Authority, Oregon Administrative Rules related to the Oregon Health Plan Medicaid Demonstration Project and State Children's Health Insurance Program concerning mental health services, the Oregon Revised Statutes concerning the Oregon Health Plan, and other applicable Oregon statutes and administrative rules concerning mental health services. If CONTRACTOR believes that any provision of this agreement or COUNTY's interpretation thereof is in conflict with Federal and State statutes or regulations, CONTRACTOR shall notify COUNTY in writing immediately.

2. General Performance Standards

COUNTY shall monitor services provided by CONTRACTOR and has the right to require CONTRACTOR's compliance with OHA established standards and other performance requirements relative to the quantity and quality of service and care, access to care, and administrative and fiscal management, and with all obligations and conditions stated in this agreement.

- a. Licenses and Certifications. By signing this agreement, CONTRACTOR assures that all licenses and certifications required by statute or administrative rule are and will remain current and valid for all of CONTRACTOR's employees and independent contractors providing direct service and for all of CONTRACTOR's facilities in which services are provided. CONTRACTOR assures that it is certified under OAR 309-012-0130 – 309-012-0220 or licensed under ORS Chapter 443 by the State of Oregon to deliver specified services.
- b. Eligibility and Authorization of Services. CONTRACTOR shall verify eligibility and enrollment of clients prior to providing and billing for service and obtain authorization for the provision of covered services as necessary and appropriate according to COUNTY policies and procedures. CONTRACTOR shall participate in the COUNTY concurrent review process. CONTRACTOR understands that authorization for services will be based upon this review process.
- c. Quality Assurance and Utilization Review. CONTRACTOR shall cooperate with, and participate in, COUNTY's quality assurance and utilization review programs. CONTRACTOR shall also participate in Health Share of Oregon quality initiatives as developed. Further, CONTRACTOR shall have a planned, systematic, and ongoing process for monitoring, evaluating and improving the quality and appropriateness of Covered Services provided to clients consistent with the requirements of the Health Share of Oregon / Clackamas Participation Agreement and with practice guidelines established by COUNTY.

CONTRACTOR shall work with COUNTY staff to ensure that authorized services provided by CONTRACTOR to clients are the most appropriate and cost efficient, and least restrictive. CONTRACTOR staff shall make records available to COUNTY staff on site upon reasonable notice for purposes of utilization review.

- d. Contractual Compliance. CONTRACTOR shall ensure that all providers and staff employed or contracted by CONTRACTOR who provide services to clients or are otherwise engaged in activities under this agreement are fully aware of and in compliance with the terms and conditions of this agreement.

e. Provider Appeal Process. CONTRACTOR shall have the right to appeal actions by COUNTY or decisions concerning interpretation of the Health Share of Oregon / Clackamas Participation Agreement as they apply to this agreement. Appeals shall be made in writing.

(1) Appeals related to administrative or clinical decisions and all other matters shall be made to COUNTY Administration within thirty (30) calendar days of the date of the action being appealed. A decision shall be issued within twenty-one (21) business days of receipt of the written appeal. An appeal of that decision can be made in writing to the Director of Clackamas County Behavioral Health Division within fourteen (14) business days of the date of the decision. The Director will issue a decision within twenty-one (21) business days, and that decision will be final.

(2) If CONTRACTOR disputes a decision by COUNTY that arises from interpretation of the Health Share of Oregon / Clackamas Participation Agreement, COUNTY will submit the facts of the dispute to the OHA Medicaid Policy Unit for determination within fourteen (14) business days of receipt from CONTRACTOR. Administrative review of decisions of the OHA Medicaid Policy Unit may be made as outlined in the Health Share of Oregon / Clackamas Participation Agreement.

3. Staff Credentials

COUNTY delegates to CONTRACTOR the credentialing and recredentialing of employed and contracted staff who provide services to clients under this agreement. Pursuant to OAR 410-141-3120 "Operations and Provision of Health Services", CONTRACTOR must, at a minimum, obtain and verify documents that provide evidence of credentials and complete database queries, as follows:

- Appropriate education and academic degrees;
- Licenses or certificates, as required;
- Relevant work history or qualifications;
- Completion of a successful criminal history records check through the Oregon Law Enforcement Data System; and
- Positive clearance by the National Practitioner Data Bank and the List of Parties Excluded from Federal Procurement or Nonprocurement Programs.

CONTRACTOR shall not permit any person to provide services under this agreement if that person is listed on the non-procurement portion of the General Service Administration's "List of Parties Excluded from Federal Procurement or Nonprocurement Programs" in accordance with Executive Orders No. 12549 and No. 12689, "Debarment and Suspension" (2 CFR Part 180). CONTRACTOR shall not permit any person to provide services under this agreement who has been terminated from the Division of Medical Assistance Program or excluded as Medicare/Medicaid providers by the Centers for Medicare and Medicaid Services or who are subject to exclusion for any lawful conviction by a court for which the provider could be excluded under 42 CFR 1001.101 "Program Integrity – Medicare and State Health Care Programs Subpart B. CONTRACTOR may not submit claims for services provided after the date of such exclusion, conviction or termination.

COUNTY reserves the right to review, upon reasonable notice and at CONTRACTOR's site, the actual documents describing the degrees, licenses and certifications of CONTRACTOR's employees and independent contractors for purposes of verification pursuant to the requirements of the Health Share of Oregon / Clackamas Participation Agreement.

CONTRACTOR assures that all of CONTRACTOR's employees and independent contractors providing direct service under this agreement will work within the scope of their credentials and any applicable licensure or registration, or criteria for certification if not required to be licenses or registered pursuant to OAR 410-141-3120. CONTRACTOR shall not allow services to be provided by an employee or independent contractor who does not have a valid license or certification required by state or federal law.

CONTRACTOR shall provide COUNTY with a list of all staff and independent contractors who will provide services to clients under this agreement. The list shall be submitted to COUNTY within thirty (30) days of the effective date of this agreement and shall be updated as information changes or as changes as made to CONTRACTOR's staff. The list shall document the academic degree, license, certification, and/or qualifications of each employee and independent contractor providing services under this agreement. The list shall also reflect, where applicable, the academic specialty or other applicable evidence of specialized qualifications of such individuals.

4. Recordkeeping

a. Clinical Records, Access and Confidentiality

- (1) **Clinical Records.** CONTRACTOR shall ensure maintenance of recordkeeping consistent with OAR 410-141-3180, "Record Keeping and Use of Health Information Technology." The clinical record shall fully document the mental condition of the client and the services received by the client under this agreement. All clinical records relevant to this agreement shall be retained for at least seven (7) years after the date of clinical services for which claims are made, encounters reported, final payment is made, or all pending matters are closed, whichever time period is longer. If an audit, litigation, research and evaluation, or other action involving the records is started before the end of the seven-year-period, the records must be retained until all issues arising out of the action are resolved or until the end of the seven-year-period, whichever is later.
- (2) **Government Access to Records.** At all reasonable times, CONTRACTOR and its subcontractors shall provide the Center for Medicare and Medicaid Services (CMS), the Comptroller General of the United States, the Oregon Secretary of State, the Oregon Department of Justice Medicaid Fraud Unit, DMAP, OHA, COUNTY and all their duly authorized representatives the right of access to CONTRACTOR's financial (including all accompanying billing records), clinical/medical, and personnel records that are directly pertinent to this agreement in order to monitor and evaluate cost, performance, compliance, quality, appropriateness and timeliness of services provided, and the capacity of CONTRACTOR to bear the risk of potential financial losses. These records shall be made available for the purpose of making audit, examination, excerpts and transcriptions. CONTRACTOR shall, upon request and without charge, provide a suitable work area and copying capabilities to facilitate such a review or audit.
- (3) **Confidentiality and Privacy of Records.** The confidentiality of information concerning clients is subject to State and Federal guidelines, including but not limited to State (ORS 179.505 through 179.507, ORS 192.502, ORS 411.320, ORS 433.045(3)) and Federal (42 CFR Part 2, 42 CFR Part 431, Subpart F, 45 CFR 205.50) confidentiality laws and regulations. CONTRACTOR and COUNTY shall not use, release, or disclose any information regarding a client for any purpose not directly connected with the administration of this agreement or under Title XIX of the Social Security Act, except with the written consent of the client or, if appropriate, the client's parent or guardian, or unless otherwise authorized by law. CONTRACTOR shall ensure that its agents, employees, officers and subcontractors with access to client records understand and comply with this confidentiality provision.
- (4) **Release of Information.** CONTRACTOR shall assure that COUNTY and any other cooperating health service providers have access to the applicable contents of the client's

clinical record when necessary for use in the diagnosis or treatment of the client, to the extent such access is permitted by law. CONTRACTOR shall release mental health service information requested by COUNTY or a provider involved in the care of a client within ten (10) business days of receiving a signed release. Except as provided in ORS 179.505(9), CONTRACTOR shall provide the client or the client's legal guardian access to client's record and provide copies within ten (10) business days of any request for copies.

- (5) External Review. CONTRACTOR shall cooperate with OHA by providing access to records and facilities for the purpose of an annual external, independent professional review of the quality outcomes and timeliness of, and access to, services under this agreement.
- (6) Keep such records as are necessary to fully disclose the extent of the services provided to individuals receiving OHP assistance and shall furnish such information to any State or federal agency responsible for administering the OHP program regarding any payments claimed by such person or institution for providing OHP Services as the State or federal agency may from time to time request. 42 USC Section 1396a(a)(27); 42 CFR 431.107(b)(1) & (2); and 42 CFR 457.950(a)(3).

b. Financial Records

- (1) CONTRACTOR shall establish and maintain policies and procedures related to financial management and financial records consistent with Generally Accepted Accounting Principles. CONTRACTOR shall make such policies and procedures available to COUNTY upon request.
- (2) CONTRACTOR shall maintain up-to-date accounting records that accurately reflect all revenue by source, all expenses by object of expense, and all assets, liabilities and equities consistent with Generally Accepted Accounting Principles and Oregon Administrative Rules. CONTRACTOR shall make reports and fiscal data generated under and for this agreement available to COUNTY upon request.
- (3) COUNTY shall conduct a fiscal compliance review of CONTRACTOR as part of compliance monitoring of this agreement. CONTRACTOR agrees to provide, upon reasonable notice, access to all financial books, documents, papers and records of CONTRACTOR which are pertinent to this agreement to ensure appropriate expenditure of funds under this agreement. COUNTY shall monitor compliance with COUNTY's financial reporting and accounting requirements.
- (4) CONTRACTOR may be subject to audit requirements. CONTRACTOR agrees that audits must be conducted by Certified Public Accountants who satisfy the Independence requirement outlined in the rules of the American Institute of Certified Public Accountants (Rule 101 of the AICPA Code of Professional Conduct), the Oregon State Board of Accountancy OAR 801-030-0005, the independence rules contained within Governmental Auditing Standards (2011 Revision), and rules promulgated by other federal, state and local government agencies with jurisdiction over CONTRACTOR.
- (5) CONTRACTOR shall establish and maintain systematic written procedures to assure timely and appropriate resolution of review or audit findings and recommendations. CONTRACTOR shall make such procedures and documentation of resolution of audit findings available to COUNTY upon request.
- (6) Limited Scope and Full Audits shall be completed within nine (9) months of the close of CONTRACTOR's fiscal year. Audit reports, including the Management Letter associated with the audit shall be submitted to COUNTY within two weeks from the date of the report. Failure to submit required audit reports and Management Letters shall be cause for withholding of contract payment until audits are submitted.

c. Consumer Complaints

- (1) CONTRACTOR shall maintain a record of all complaints made to CONTRACTOR by the client related to services provided under this agreement. A complaint means any expression of dissatisfaction, whether oral or written, submitted by a client or representative, related to any aspect of CONTRACTOR's operations, activities or behavior that pertains to availability, delivery or quality of care. The expression may be in whatever form or communication or language that is used by the client.
- (2) CONTRACTOR shall post information on client rights and responsibilities and its consumer complaint process in a visible location in all offices, clinics and other service locations.
- (3) CONTRACTOR shall provide a copy of its consumer complaint policy and procedure to COUNTY upon request.
- (4) COUNTY reserves the right to review, upon reasonable notice and at CONTRACTOR's site, the actual documents of complaints submitted by clients, and the process by which complaints are resolved by CONTRACTOR.

5. Reporting

a. Abuse Reporting

CONTRACTOR shall comply with all processes and procedures of abuse reporting, investigations, and protective services as described in ORS 430.735 through 430.765, Abuse Reporting for Mentally Ill and OAR 407-045-0250 through 407-045-0370, "Abuse Reporting and Protective Services in Community Programs and Community Facilities".

b. Third-Party Resource Information

CONTRACTOR shall be responsible for maintaining records in such a manner so as to ensure that all moneys collected from third-party resources on behalf of clients may be identified and reported to COUNTY on an individual client basis. CONTRACTOR shall make these records available for audit and review consistent with the provisions of the Health Share of Oregon / Clackamas Participation Agreement.

c. Encounter Data

CONTRACTOR shall submit to COUNTY accurate and complete encounter data in the form of a CMS 1500 claim form for each contact with a client. CONTRACTOR shall use its best efforts to supply encounter data once a month, and shall in all cases, supply encounter data no later than 120 calendar days after a contact with a client. Each encounter claim shall include such information as required in the Health Share of Oregon / Clackamas Participation Agreement and meet specifications as a Valid Claim. CONTRACTOR shall use the most current DSM Multi-Axial Classification System. DSM codes shall be reported at the highest level of specificity.

d. Client Process Monitoring System (CPMS)

CONTRACTOR shall submit CPMS data for all clients receiving Covered Services under this agreement. CONTRACTOR shall submit all CPMS data to OHA via electronic media in the specific CPMS format. CONTRACTOR shall submit CPMS data within 30 days of initiating Covered Services and within 30 days of terminating Covered Services, reporting the data elements specified in the Health Share of Oregon / Clackamas Participation Agreement.

e. Data Submission Timeliness

CONTRACTOR assures that any and all data used for COUNTY's analysis of access, capacity, quality, consumer satisfaction, financial solvency, encounter data submission, and other data submission shall be submitted to COUNTY within time frames sufficient to allow COUNTY to meet OHA reporting requirements as described in the Health Share of Oregon / Clackamas Participation Agreement.

6. Monitoring

a. Agreement Compliance Monitoring

COUNTY and OHA shall conduct agreement compliance and quality assurance monitoring related to this agreement. CONTRACTOR shall cooperate with COUNTY and OHA in such monitoring. COUNTY shall provide CONTRACTOR twenty (20) business days written notice of any agreement compliance and quality assurance monitoring activity that requires any action or cooperation by CONTRACTOR. Notice of monitoring shall include the date the monitoring shall occur, names of individuals conducting the monitoring, and instructions and requests for information.

Should CONTRACTOR found to be out of compliance with any requirement of this agreement, the following actions may be taken by COUNTY until the issue is resolved:

- Request a conference of the parties to determine the need for technical assistance
- Require a corrective action plan
- Disallow referral of new clients to CONTRACTOR
- Put CONTRACTOR on probationary status and suspend billing authority

Should the issue remain unresolved, COUNTY may consider CONTRACTOR in breach and may terminate this agreement.

b. External Quality Review

CONTRACTOR agrees to participate with COUNTY in any evaluation project or performance report as designed by COUNTY or applicable State or Federal agency. CONTRACTOR shall make all information required by any such evaluation project or process available to COUNTY or COUNTY's designee within thirty (30) business days of request.

EXHIBIT E

FRAUD AND ABUSE

CONTRACTOR shall comply with, and as indicated, cause all employees and subcontractors to comply with, the following requirements related to fraud and abuse.

1. General

- a. CONTRACTOR, its employees and subcontractors shall comply with all provisions of the False Claims Act established under sections 3729 through 3733 of title 31, United States Code, administrative remedies for false claims and statements established under chapter 38 of title 31, United States Code, any Oregon laws pertaining to civil or criminal penalties for false claims and statements, and whistleblower protections under such laws, with respect to the role of such laws in preventing and detecting fraud, waste, and abuse in Federal health care programs (as defined in 42 USC 1320a-7b).
- b. CONTRACTOR, its employees and subcontractors shall comply with Oregon laws pertaining to false claims including the following: ORS 411.670 to 411.690 (submitting wrongful claim or payment prohibited; liability of person wrongfully receiving payment; amount of recovery); ORS 646.505 to 646.656 (unlawful trade practices); ORS chapter 162 (crimes related to perjury, false swearing and unsworn falsification); ORS chapter 164 (crimes related to theft); ORS chapter 165 (crimes involving fraud or deception), including but not limited to ORS 165.080 (falsification of business records) and ORS 165.690 to 165.698 (false claims for health care payments); ORS 659A.199 to 659A.224 (whistle blowing); OAR 410-120-1395 to 410-120-1510 (program integrity, sanctions, fraud and abuse); and common law claims founded in fraud, including Fraud, Money Paid by Mistake and Money Paid by False Pretenses.
- c. CONTRACTOR shall include information in its employee handbooks or other appropriate documents on laws described above, regarding the rights of employees to be protected as whistleblowers.
- d. CONTRACTOR shall further have policies and procedures for detecting and preventing fraud, waste and abuse that shall, at a minimum, include a process for monitoring and auditing files, claims and staff performance.
- e. Entities receiving \$5 million or more annually (under this Contract and any other OHP contract) for furnishing Medicaid health care items or services shall, as a condition of receiving such payments, adopt written fraud, waste and Abuse policies and procedures and inform employees, contractors and agents about the policies and procedures in compliance with Section 6032 of the Deficit Reduction Act of 2005, 42 USC § 1396a(a)(68).
- f. Certify when submitting any Claim for the provision of OHP Services that the information submitted is true, accurate and complete. CONTRACTOR shall acknowledge CONTRACTOR's understanding that payment of the Claim will be from federal and State funds and that any falsification or concealment of a material fact may be prosecuted under federal and State laws.

2. Fraudulent Billing and False Claims

- a. If it is determined that services billed by CONTRACTOR and paid with Medicaid funds were fraudulently billed, or that a false claim was submitted, or that an instance of abuse has occurred, the following disciplinary actions may be taken by COUNTY:
 - If Medicaid abuse is determined, consider restitution of funds based on the severity of the abuse identified.

- If fraud is determined or a false claim verified, require restitution of funds.
 - If the action identified is determined to be non-intentional, require a corrective action plan
 - Put CONTRACTOR on probationary status and suspend billing authority until the issue is resolved
 - Termination of this agreement
- b. COUNTY shall promptly refer all verified cases of fraud and abuse to the Medicaid Fraud Control Unit, consistent with the Memorandum of Understanding between the State of Oregon Department of Human Services and the Medicaid Fraud Control Unit. COUNTY shall also refer cases of suspected fraud and abuse to the Medicaid Fraud Control Unit prior to verification.

3. Participation of Suspended or Excluded Providers

CONTRACTOR shall ensure that Covered Services may not be provided to clients by the following persons (or their affiliates as defined in the Federal Requisition Regulations):

- Persons who are currently suspended, debarred or otherwise excluded from participating in procurement activities under the Federal Acquisition Regulation or from participating in non-procurement activities under regulations issues pursuant to Executive Order 12549 or under guidelines implementing such order; and
- Persons who are currently excluded from Medicaid participation under section 1128 or section 1128A of the Act; and
- Persons who are currently excluded from providing services under the Oregon Medical Assistance Program.

EXHIBIT F

COMPLIANCE WITH APPLICABLE LAW

CONTRACTOR shall comply and, as indicated, cause all employees and subcontractors to comply with the following Federal requirements. For purposes of this agreement, all references to Federal and State laws are references to Federal and State laws as they may be amended from time to time.

1. Miscellaneous Federal Provisions

CONTRACTOR shall comply and cause all subcontractors to comply with all federal laws, regulations and executive orders applicable to this Contract or to the delivery of Work. Without limiting the generality of the foregoing, CONTRACTOR expressly agrees to comply and cause all subcontractors to comply with the following laws, regulations and executive orders to the extent they are applicable to this Contract: (a) Title VI and VII of the Civil Rights Act of 1964, as amended, (b) 45 CFR Part 84 which implements, Title V, Sections 503 and 504 of the Rehabilitation Act of 1973, as amended, (c) the Americans with Disabilities Act of 1990, as amended, (d) Executive Order 11246, as amended, (e) the Health Insurance Portability and Accountability Act of 1996, as amended, (f) the Age Discrimination in Employment Act of 1967, as amended, and the Age Discrimination Act of 1975, as amended, (g) the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended, (h) all regulations and administrative rules established pursuant to the foregoing laws, (i) all other applicable requirements of federal civil rights and rehabilitation statutes, rules and regulations, and (j) all federal law governing operation of CMHPs, including without limitation, all federal laws requiring reporting of client abuse. These laws, regulations and executive orders are incorporated by reference herein to the extent that they are applicable to this Contract and required by law to be so incorporated. No federal funds may be used to provide Work in violation of 42 USC 14402.

2. Equal Employment Opportunity

If this Contract, including amendments, is for more than \$10,000, then CONTRACTOR shall comply and cause all subcontractors to comply with Executive Order 11246, entitled "Equal Employment Opportunity," as amended by Executive Order 11375, and as supplemented in Department of Labor regulations (41 CFR Part 60).

3. Non-Discrimination

- a. CONTRACTOR shall comply with all federal and State laws and regulations including Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972 (regarding education programs and activities) the Age Discrimination Act of 1975, the Rehabilitation Act of 1973, the Americans with Disabilities Act (ADA) of 1990, and all amendments to those acts and all regulations promulgated thereunder. CONTRACTOR shall also comply with all applicable requirements of State civil rights and rehabilitation statutes and rules.
- b. CONTRACTOR shall comply with and cause its subcontractors to comply with the integration mandate in 28 CFR 35.130(d), Title II of the Americans with Disabilities Act and its implementing regulations published in the Code of Federal Regulations.

4. Drug Free Workplace

CONTRACTOR shall maintain and cause all subcontractors to maintain a drug-free workplace and shall notify employees that the unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in CONTRACTOR's workplace. CONTRACTOR shall establish a drug-free awareness program and provide each employee to be engaged in the provision of services under this agreement with information about its drug-free workplace program. CONTRACTOR will further comply with additional applicable provisions of the Health Share of Oregon Core Contract.

5. Clinical Laboratory Improvement

If applicable to Scope of Work, CONTRACTOR shall and shall ensure that any Laboratories used by CONTRACTOR shall comply with the Clinical Laboratory Improvement Amendments (CLIA 1988), 42 CFR Part 493 Laboratory Requirements and ORS 438 (Clinical Laboratories, which require that all laboratory testing sites providing services under this agreement shall have either a Clinical Laboratory Improvement Amendments (CLIA) certificate of waiver or a certificate of registration along with a CLIA identification number. Those Laboratories with certificates of waiver will provide only the eight types of tests permitted under the terms of their waiver. Laboratories with certificates of registration may perform a full range of laboratory tests.

6. Clean Air, Clean Water, EPA Regulations

If this agreement, including amendments, exceeds \$100,000 then CONTRACTOR shall comply and cause all subcontractors to comply with all applicable standards, orders, or requirements issued under Section 306 of the Clean Air Act (42 U.S.C. 7606), the Federal Water Pollution Control Act as amended (commonly known as the Clean Water Act) (33 U.S.C. 1251 to 1387), specifically including, but not limited to Section 508 (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (2 CFR Part 1532), which prohibit the use under non-exempt federal contracts, grants or loans of facilities included on the EPA List of Violating Facilities. Violations shall be reported to OHA, DHHS and the appropriate Regional Office of the Environmental Protection Agency. CONTRACTOR shall include and cause all subcontractors to include in all contracts with subcontractors receiving more than \$100,000, language requiring the subcontractor to comply with the federal laws identified in this section.

7. Energy Efficiency

CONTRACTOR shall comply and cause all subcontractors to comply with applicable mandatory standards and policies relating to energy efficiency that are contained in the Oregon energy conservation plan issued in compliance with the Energy Policy and Conservation Act, 42 U.S.C. 6201 et seq. (Pub. L. 94- 163).

8. Resource Conservation and Recovery

CONTRACTOR shall comply and cause all subcontractors to comply with all mandatory standards and policies that relate to resource conservation and recovery pursuant to the Resource Conservation and Recovery Act (codified at 42 USC 6901 et. seq.). Section 6002 of that Act (codified at 42 USC 6962) requires that preference be given in procurement programs to the purchase of specific products containing recycled materials identified in guidelines developed by the Environmental Protection Agency. Current guidelines are set forth in 40 CFR Part 247.

9. Audits

CONTRACTOR shall comply and, if applicable, cause a subcontractor to comply, with the applicable audit requirements and responsibilities set forth in the Office of Management and Budget Circular A-133 entitled "Audits of States, Local Governments and Non-Profit Organizations."

10. Truth in Lobbying

CONTRACTOR certifies, to the best of the CONTRACTOR's knowledge and belief that:

- a. No federal appropriated funds have been paid or will be paid, by or on behalf of CONTRACTOR, to any person for influencing or attempting to influence an officer or employee of an agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal

grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any federal contract, grant, loan or cooperative agreement.

- b. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with this federal contract, grant, loan or cooperative agreement, CONTRACTOR shall complete and submit Standard Form LLL, "Disclosure Form to Report Lobbying" in accordance with its instructions.
- c. CONTRACTOR shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients and subcontractors shall certify and disclose accordingly.
- d. This certification is a material representation of fact upon which reliance was placed when this Contract was made or entered into. Submission of this certification is a prerequisite for making or entering into this agreement imposed by Section 1352, Title 31, of the U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

11. Conflict of Interest Safeguards

- a. CONTRACTOR and its subcontractors shall have in effect safeguards, including, but not limited to, policies and procedures against conflict of interest with any State of Oregon Department of Human Services employees or other agents of the State who have responsibilities relating to this agreement. These safeguards must be at least as effective as the safeguards specified in Section 27 of the Office of Federal Procurement Policy Act (41 USC 423) and must include safeguards to avoid conflicts that could be prohibited under 18 USC 207 or 208 if the Department of Human Services employee or agent was an officer or employee of the United States Government. For purposes of implementing policies and procedures required in this section, CONTRACTOR shall apply the definitions in the State Public Ethics Law as if they applied to CONTRACTOR for "Actual conflict of interest," ORS 244.020(1), "potential conflict of interest," ORS 244.020(14), and "client of household," ORS 244.020(12).
- b. CONTRACTOR shall not offer to any DHS or OHA employee (or any relative or member of their household) any gift or gifts with an aggregate value in excess of \$50 during a calendar year or any gift or payment of expenses for entertainment. "Gift" for this purpose has the meaning defined in ORS 244.020(6) and OAR 199-005-0001 to 199-005-0035.
- c. "CONTRACTOR" for purposes of this section includes all CONTRACTOR's affiliates, assignees, subsidiaries, parent companies, successors and transferees, and persons under common control with the CONTRACTOR; any officers, directors, partners, agents and employees of such person; and all others acting or claiming to act on their behalf or in concert with them.
- d. CONTRACTOR shall apply the definitions in the State Public Ethics Law, ORS 244.020, for "actual conflict of interest", "potential conflict of interest", "relative" and "member of household".

12. Protected Health Information

CONTRACTOR is a "covered entity" for the purposes of the provisions of the Health Insurance Portability and Accountability Act (HIPAA), Title II, Subtitle F, Administrative Simplification, or the Federal regulations implementing the Act. CONTRACTOR shall develop and implement such policies and procedures for maintaining the privacy and security of records and authorizing the use and disclosure of records consistent with HIPAA and/or other Federal, State, and local laws, rules

and regulations applicable to the work performed under this agreement. CONTRACTOR shall ensure that confidential records are secure from unauthorized disclosure. Electronic storage and transmission of confidential client information and records shall assure accuracy, backup for retention and safeguards against tampering, back dating or alteration.

13. HIPAA Compliance

- a. The parties acknowledge and agree that each of OHA and CONTRACTOR is a "covered entity" for purposes of privacy and security provisions of the Health Insurance Portability and Accountability Act and the federal regulations implementing the Act (collectively referred to as HIPAA). OHA and CONTRACTOR shall comply with HIPAA to the extent that any Work or obligations of OHA arising under this agreement are covered by HIPAA.
- b. CONTRACTOR shall develop and implement such policies and procedures for maintaining the privacy and security of records and authorizing the use and disclosure of records required to comply with this agreement and with HIPAA. CONTRACTOR shall comply and cause all subcontractors to comply with HIPAA and all the HIPAA provisions listed in the Health Share of Oregon Core Contract.
- c. HIPAA Information Security. CONTRACTOR shall adopt and employ reasonable administrative and physical safeguards consistent with the Security Rules in 45 CFR Part 164 to ensure that Member Information shall be used by or disclosed only to the extent necessary for the permitted use or disclosure and consistent with applicable State and federal laws and the terms and conditions of this agreement. Security incidents involving Member Information must be immediately reported to DHS' Privacy Officer.



4 **COPY**
CAMPBELL M. GILMOUR
DIRECTOR

DEPARTMENT OF TRANSPORTATION AND DEVELOPMENT

DEVELOPMENT SERVICES BUILDING
150 BEAVERCREEK ROAD | OREGON CITY, OR 97045

April 25, 2013

Board of County Commissioners
Clackamas County

Members of the Board:

**Approval of a Resolution Declaring the Public Necessity and Purpose
for Acquisition of Rights of Way and Easements
for the Barlow/Zimmerman Intersection Improvement Project and
Authorizing Negotiations and Eminent Domain Actions**

Purpose/Outcomes	Under ORS 35.235 and the federal Uniform Act, a local governmental agency is required to declare by resolution or ordinance the necessity and the purpose for which the project is required by enacting a Condemnation Resolution prior to initiating acquisition of the easements or other property rights from abutters to the project.
Dollar Amount and Fiscal Impact	The right of way budget for the project is \$122,209 and is included within the \$2,300,000 total approved project budget.
Funding Source	Total Project Budget: Federal Revenue: \$1,697,886 High Risk Rural Roads Program: \$356,012 County Road Fund: \$246,102
Safety Impact	The project will improve the sight distance south of the intersection of Barlow Road and Zimmerman Road in Clackamas County.
Duration	The Resolution remains active throughout the project's duration and terminates upon completion of the project or when all litigation associated with the project is concluded.
Previous Board Action	ODOT/County High Risk Rural Roads Program Supplemental Project Agreement No. 25070 Barlow Road/Zimmerman Road Intersection (Clackamas County): executed by the County on 09/10/09 and by ODOT on 10/15/09. ODOT/County High Risk Rural Roads Program Supplemental Project Agreement No. 25070 Barlow Road/Zimmerman Road Intersection (Clackamas County): Amendment No. 1 executed by the County on 02/10/11 and by ODOT on 02/22/11. ODOT/County High Risk Rural Roads Program Supplemental Project Agreement No. 25070 Barlow Road/Zimmerman Road Intersection (Clackamas County): Amendment No. 2 executed by the County on 04/26/12 and by ODOT on 05/11/12. ODOT/County Intergovernmental Agreement for Right of Way Services No. 25595: executed by the County on 01/07/2010 and by ODOT on 01/19/10.
<i>(continued)</i> Contact Person	Jim Reese, DTD Project Mgr @ 503-742-4707 Kath Rose, DTD Sr. Right of Way Agent @ 503-742-4713

BACKGROUND:

The Board of County Commissioners has approved funding for the Barlow/ Zimmerman Intersection Improvement Project No. 22171, which will provide for the re-construction of 600 feet of Barlow Road south of its intersection with Zimmerman Road. This project is one of the County's top safety projects and will improve the existing sight distance at the intersection. The Board has authority under ORS Chapter 35 to acquire rights of way and easements by purchase or condemnation proceedings.

The project has been planned and located in a manner which is most compatible with the greatest public good and which causes the least private injury. The Department of Transportation and Development (Department) shall negotiate in good faith in an attempt to reach agreement as to the amount of just compensation owed each affected property owner. To fairly determine the amount of just compensation, staff will utilize the expertise of authorized real estate appraisers and other such experts.

The Department has developed the final legal descriptions required for acquisition of the rights of way and easements for the seven properties affected by the Project. If during the course of the project design/construction modifications should effect acquisitions, staff will bring subsequent revisions to the Board for authorization.

The resolution directs the Department to resolve issues of just compensation through good faith negotiations. It requires the Director of the Department to notify the Board if exercise of the power of eminent domain becomes necessary. Only after this process is completed does it authorize the Office of County Counsel to file a condemnation action.

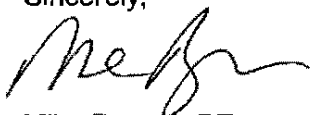
Staff respectfully requests that the Board approve a Resolution of Necessity and Purpose for the Barlow/ Zimmerman Intersection Improvement Project for the acquisition of necessary rights of way and easements to provide for construction of the project.

The Resolution has been reviewed and approved by County Counsel.

RECOMMENDATION:

Staff respectfully recommends that the Board of County Commissioners approves the Resolution authorizing the acquisition of rights of way and easements by negotiation if possible, or condemnation, if necessary.

Sincerely,



Mike Bezner, PE
Transportation Engineering Manager

Attachment

For information on this issue or copies of attachments
please contact Kath Rose, Sr. Right of Way Agent at (503) 742-4713

**BEFORE THE BOARD OF COUNTY COMMISSIONERS
OF CLACKAMAS COUNTY, STATE OF OREGON**

 COPY

In the Matter of the Barlow/Zimmerman
Intersection Improvement Project, Declaring
the Necessity and Purpose for Acquisition of
Rights of Way and Easements, and
Authorizing Negotiations and
Eminent Domain Actions



Order No. _____
(Page 1 of 2)

This matter comes before the Board of County
Commissioners of Clackamas County, Oregon (the "Board") at its regularly scheduled meeting on April
25, 2013; and,

It appearing that the Board previously approved funding
for the Barlow/Zimmerman Intersection Improvement Project No. 22171 ("Project"), which will provide for
the re-construction of Barlow Road south of its intersection with Zimmerman road, that the Project is
consistent with the powers and purposes of County government, and that the Project is necessary for the
continued growth, safety and welfare of the community; and,

It further appearing to the Board that the Project has
been planned and located in a manner which is most compatible with the greatest public good and
causes the least private injury; and,

It further appearing to the Board that the acquisition of
the rights of way and easements, described in Exhibit "A" is a necessary part of the Project and therefore
is also consistent with the powers and purposes of County government, and necessary for the continued
growth, safety and welfare of the community; and,

It further appearing to the Board that immediate
possession of the rights of way and easements described in Exhibit "A" may be necessary and will be in
the public interest in order to commence and complete the Project in a timely manner; and,

It further appearing that the Board has authority under
ORS Chapter 35 to acquire rights of way and easements by purchase or eminent domain proceedings.

NOW, THEREFORE, IT IS HEREBY RESOLVED that
this Board declares it necessary and in the public interest that the County immediately start acquisition of
rights of way and easements described in Exhibit "A", either through negotiation and agreement,
purchase, or, if necessary, by commencement of eminent domain proceedings.

**BEFORE THE BOARD OF COUNTY COMMISSIONERS
OF CLACKAMAS COUNTY, STATE OF OREGON**

In the Matter of the Barlow/Zimmerman
Intersection Improvement Project, Declaring
the Necessity and Purpose for Acquisition of
Rights of Way and Easements, and
Authorizing Negotiations and
Eminent Domain Actions



Order No. _____
(Page 2 of 2)

IT IS FURTHER ORDERED THAT:

1). The Department of Transportation and Development immediately, and in good faith, attempt to negotiate agreements as to amount of just compensation owed each owner of each property identified in Exhibit "A". In so doing, the department is authorized to retain real estate appraisers, negotiators, and other such experts deemed necessary to fairly determine the amount of just compensation owed; and,

2). If the Director of the Department of Transportation and Development (the "Director") determines that changes to the design of the Project, unanticipated field conditions, or the need to accommodate uneconomic remnants makes it necessary or desirable to modify the rights of way and easements required for the Project, the Director shall promptly bring before the Board, and the Board shall promptly consider a resolution amending Exhibit "A"; and,

3). It is the intention of the Board that the required rights of way and easements identified in Exhibit "A" be obtained through good faith negotiation. The Board acknowledges that the exercise of the power of eminent domain may be necessary. The Director shall inform the Board when the Director deems eminent domain necessary. Thereafter, the Office of County Counsel is authorized to file complaints in condemnation and take such other steps as it determines necessary for the immediate possession of required rights of way and easements and the successful litigation of the condemnation action, including the retention of real estate appraisers, experts and other consultants deemed necessary to the successful conclusion of that litigation.

Dated this _____ day of _____, 2013.

John Ludlow, Chair

Mary Raethke, Recording Secretary

S:RW/Barlow-Zimmerman/Ordinance/Ordinance Form



Exhibit A
Project Legal Descriptions
Barlow/Zimmerman Intersection Improvement

Property No. 01; Tax Lot 41E29 00401

TRACT 1 (Permanent Right of Way Easement for Road Purposes)

A tract of land being a portion of that property described in Statutory Warranty Deed Document Number 2005-046328, Clackamas County Deed Records. Said tract of land being situated in the southwest quarter of Section 29, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the northwest corner of said southwest quarter of said legal subdivision, said point also being the on the centerline of Barlow Road, County Road No. 2094; Thence, South 89°04'44" East, 30.01 feet to a point on the east right of way line of said Barlow Road, said point also being the northwest corner of said Document Number 2005-046328 tract, said point also being the true point of beginning of the herein described tract; Thence, along the north line of said tract, South 89°04'44" East, 7.64 feet to a point of non-tangent curve, the radius of which bears South 86°13'23" East, 1470.00 feet; Thence, leaving said north line, and along the arc of a non-tangent curve to the left, having a radius of 1470.00 feet, through a central angle of 4°17'50", an arc distance of 110.25 feet, the chord of which bears South 1°37'42" West, 110.23 feet to a point of tangency; Thence, South 0°31'13" East, 197.18 feet; Thence, South 89°40'22" West, 4.54 feet to a point on the east right of way line of said Barlow Road; Thence, tracing said east line, North 0°19'38" West, 307.52 feet to the true point of beginning.

Said tract of land contains 1,389 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

TRACT 2 (Permanent Slope Easement)

A tract of land being a portion of that property described in Statutory Warranty Deed Document Number 2005-046328, Clackamas County Deed Records. Said tract of land being situated in the southwest quarter of Section 29, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the northwest corner of said southwest quarter of said legal subdivision, said point also being the on the centerline of Barlow Road, County Road No. 2094; Thence, South 89°04'44" East, 37.65 feet to a point on the north line of said Document Number 2005-046328 tract, said point also being the true point of beginning of the herein described tract; Thence, along said north line, South 89°04'44" East, 21.58 feet; Thence, leaving said north line, South 3°38'33" West, 307.63 feet; Thence, South 89°40'22" West, 3.37 feet; Thence, North 0°31'13" West, 197.19 feet to a point of tangent curve; Thence, along the arc of a tangent curve to the right, having a radius of 1470.00 feet, through a central angle of 4°17'50", an arc distance of 110.25 feet, the chord of which bears North 1°37'42" East, 110.23 feet to the true point of beginning.

Said tract of land contains 4,317 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

TRACT 3 (Temporary Construction Easement)

A tract of land being a portion of that property described in Statutory Warranty Deed Document Number 2005-046328, Clackamas County Deed Records. Said tract of land being situated in the southwest quarter of Section 29, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the northwest corner of said southwest quarter of said legal subdivision, said point also being the on the centerline of Barlow Road, County Road No. 2094; Thence, along said centerline, South 0°19'38" East, 318.23 feet; Thence, leaving said centerline, North 89°40'22" East, 30.00 feet to a point on the east right of way line of said Barlow Road, said point also being the true point of beginning of the herein described tract; Thence, along said east line, North 0°19'38" West, 10.05 feet; Thence, leaving said east line, North 89°40'22" East, 7.92 feet; Thence, North 3°38'33" East, 109.95 feet; Thence, South 46°32'33" East, 13.02 feet; Thence, South 3°38'33" West, 111.00 feet; Thence, South 89°40'22" West, 17.24 feet to the true point of beginning.

Said tract of land contains 1,231 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

Property No. 02; Tax Lot 41E29 00400

TRACT 1 (Permanent Right Of Way Easement for Road Purposes)

A tract of land being a portion of that property described in Warranty Deed Document Number 1993-040121, Clackamas County Deed Records. Said tract of land being situated in the northwest quarter of Section 29, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southwest corner of said northwest quarter of said legal subdivision, said point also being on the centerline of Barlow Road, County Road No. 2094; Thence, leaving said centerline and along the south line of said northwest quarter, South 89°04'44" East, 30.01 feet to a point on the east right of way line of said Barlow Road, said point also being the southwest corner of said Document Number 1993-040121 tract, said point also being the true point of beginning of the herein described tract; Thence, leaving said south line and the west right of way line of said Barlow Road, North 0°20'30" West, 886.46 feet to the intersection of said east line with the south right of way line of Zimmerman Road, County Road No. 273; Thence, leaving said east line and along said south line, South 89°13'13" East, 89.63 feet; Thence, leaving said south line, South 0°46'47" West, 5.00 feet; Thence, North 89°13'13" West, 64.80 feet; Thence, South 40°05'28" West, 25.77 feet to a point of non-tangent curve, the radius of which bears North 85°45'11" East, 1470.00 feet; Thence, along the arc of a non-tangent curve to the left,

having a radius of 1470.00 feet, through a central angle of $1^{\circ}22'34''$, an arc distance of 35.30 feet, the chord of which bears South $4^{\circ}56'06''$ East, 35.30 feet to a point of tangency; Thence, South $5^{\circ}37'23''$ East, 240.49 feet; Thence, North $84^{\circ}22'13''$ East, 25.64 feet; Thence, South $7^{\circ}28'18''$ East, 111.15 feet; Thence, South $87^{\circ}52'51''$ West, 32.17 feet to a point of non-tangent curve, the radius of which bears South $87^{\circ}52'51''$ West, 1540.00 feet; Thence, along the arc of a non-tangent curve to the right, having a radius of 1540.00 feet, through a central angle of $7^{\circ}08'14''$, an arc distance of 191.83 feet, the chord of which bears South $1^{\circ}26'58''$ West, 191.71 feet to a point of tangency; Thence, South $5^{\circ}01'05''$ West, 255.72 feet to a point of tangent curve; Thence, along the arc of a tangent curve to the left, having a radius of 1470.00 feet, through a central angle of $1^{\circ}14'28''$, an arc distance of 31.84 feet, the chord of which bears South $4^{\circ}23'51''$ West, 31.84 feet to a point on the south line of said Document Number 1993-040121 tract; Thence, along said south line, North $89^{\circ}04'44''$ West, 7.64 feet to the true point of beginning.

Said tract of land contains 26,946 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

TRACT 2 (Permanent Slope Easement)

A tract of land being a portion of that property described in Warranty Deed Document Number 1993-040121, Clackamas County Deed Records. Said tract of land being situated in the northwest quarter of Section 29, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southwest corner of said northwest quarter of said legal subdivision, said point also being on the centerline of Barlow Road, County Road No. 2094; Thence, leaving said centerline and along the south line of said northwest quarter, South $89^{\circ}04'44''$ East, 37.65 feet to a point on the south line of said Document Number 1993-040121 tract, said point also being the true point of beginning of the herein described tract, said point also being the beginning of a non-tangent curve, the radius of which bears, South $86^{\circ}13'23''$ East, 1470.00 feet; Thence, leaving the south line, along the arc of a non-tangent curve to the right, having a radius of 1470.00 feet, through a central angle of $1^{\circ}14'28''$, an arc distance of 31.84 feet, the chord of which bears North $4^{\circ}23'51''$ East, 31.84 feet to a point of tangency; Thence, North $5^{\circ}01'05''$ East, 255.72 feet to a point of tangent curve; Thence, along the arc of a tangent curve to the left, having a radius of 1540.00 feet, through a central angle of $7^{\circ}08'14''$, an arc distance of 191.83 feet, the chord of which bears North $1^{\circ}26'58''$ East, 191.71 feet; Thence, North $87^{\circ}52'51''$ East, 32.17 feet; Thence, South $10^{\circ}20'46''$ East, 27.71 feet; Thence, South $0^{\circ}05'35''$ West, 169.94 feet; Thence, South $17^{\circ}24'45''$ West, 152.80 feet; Thence, South $4^{\circ}08'30''$ East, 69.99 feet; Thence, South $3^{\circ}38'33''$ West, 67.01 feet to a point on the south line of said northwest quarter; Thence, along said line, North $89^{\circ}04'44''$ West, 21.58 feet to the true point of beginning.

Said tract of land contains 13,485 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

TRACT 3 (Permanent Slope Easement)

A tract of land being a portion of that property described in Warranty Deed Document Number 1993-040121, Clackamas County Deed Records. Said tract of land being situated in the northwest quarter of Section 29, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southwest corner of said northwest quarter of said legal subdivision, said point also being on the centerline of Barlow Road, County Road No. 2094; Thence, along said centerline, North $0^{\circ}20'30''$ West, 916.39 feet to the intersection of said centerline and the centerline of Zimmerman Road, County Road No. 274; Thence, leaving the centerline of said Barlow Road and along the centerline of said Zimmerman Road, South $89^{\circ}13'13''$ East, 120.22 feet; Thence, leaving said centerline, South $0^{\circ}46'47''$ West, 35.00 feet to the true point of beginning of the herein described tract; South $0^{\circ}46'47''$ West, 10.00 feet; Thence, North $89^{\circ}13'13''$ West, 60.07 feet; Thence, South $40^{\circ}05'28''$ West, 17.71 feet; Thence, South $8^{\circ}58'19''$ East, 271.41 feet; Thence, South $84^{\circ}22'13''$ West, 25.64 feet; Thence, North $5^{\circ}37'23''$ West, 240.49 feet to a point of tangent curve; Thence, along the arc of a tangent curve to the right, having a radius of 1470.00 feet, through a central angle of $1^{\circ}22'34''$, an arc distance of 35.30 feet, the chord of which bears North $4^{\circ}56'06''$ West, 35.30 feet; Thence, North $40^{\circ}05'28''$ East, 25.77 feet; Thence, South $89^{\circ}13'13''$ East, 64.80 feet to the true point of beginning.

Said tract of land contains 5,661 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

TRACT 4 (Temporary Construction Easement)

A tract of land being a portion of that property described in Warranty Deed Document Number 1993-040121, Clackamas County Deed Records. Said tract of land being situated in the northwest quarter of Section 29, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southwest corner of said northwest quarter of said legal subdivision, said point also being on the centerline of Barlow Road, County Road No. 2094; Thence, along said centerline, North $0^{\circ}20'30''$ West, 916.39 feet to the intersection of said centerline and the centerline of Zimmerman Road, County Road No. 274; Thence, leaving the centerline of said Barlow Road and along the centerline of said Zimmerman Road, South $89^{\circ}13'13''$ East, 120.22 feet; Thence, leaving said centerline, South $0^{\circ}46'47''$ West, 30.00 feet to a point on the south right of way line of said Zimmerman Road, said point also being the true point of beginning of the herein described tract, Thence, along said south line, South $89^{\circ}13'13''$ East, 77.99 feet; Thence, leaving said south line, South $0^{\circ}46'47''$ West, 25.00 feet; Thence, North $89^{\circ}13'13''$ West, 139.76 feet; Thence, South $8^{\circ}39'30''$ East, 413.09 feet; Thence, South $0^{\circ}05'35''$ West, 172.23 feet; Thence, South $21^{\circ}07'12''$ West, 154.64 feet; Thence, North $17^{\circ}24'45''$ East, 152.80 feet; Thence, North $0^{\circ}05'35''$ East, 169.94 feet; Thence, North $10^{\circ}20'46''$ West, 27.71 feet; Thence, North $7^{\circ}28'18''$ West, 111.15 feet; thence, North $8^{\circ}58'19''$ West, 271.41 feet; thence, North $40^{\circ}05'28''$ East, 17.71 feet; Thence, South $89^{\circ}13'13''$ East, 60.07 feet; Thence, North $0^{\circ}46'47''$ East, 15.00 feet to the true point of beginning.

Said tract of land contains 8,967 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

TRACT 5 (Temporary Construction Easement, Driveway Area)

A tract of land being a portion of that property described in Warranty Deed Document Number 1993-040121, Clackamas County Deed Records. Said tract of land being situated in the northwest quarter of Section 29, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southwest corner of said northwest quarter of said legal subdivision, said point also being on the centerline of Barlow Road, County Road No. 2094; Thence, along said centerline, North 0°20'30" West, 916.39 feet to the intersection of said centerline and the centerline of Zimmerman Road, County Road No. 274; Thence, leaving the centerline of said Barlow Road and along the centerline of said Zimmerman Road, South 89°13'13" East, 198.21 feet; Thence, leaving said centerline, South 0°46'47" West, 55.00 feet to the true point of beginning of the herein described tract, Thence, South 0°46'26" East, 296.32 feet; Thence, North 88°18'56" West, 42.72 feet; Thence, South 83°20'24" West, 55.22 feet; Thence, North 8°39'30" West, 20.10 feet; Thence, North 86°58'43" East, 70.43 feet; Thence, North 43°05'28" East, 14.41 feet; Thence, North 0°47'47" West, 267.63 feet; Thence, South 89°13'13" East, 20.13 feet to the true point of beginning.

Said tract of land contains 7,417 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

Property No. 03; Tax Lot 41E29 00301

TRACT 1 (Temporary Construction Easement)

A tract of land being a portion of that property described in Statutory Warranty Deed Document Number 1994-015173, Clackamas County Deed Records. Said tract of land being situated in the northwest quarter of Section 29, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southwest corner of said northwest quarter of said legal subdivision; Thence, along the west line of said northwest quarter, also being the centerline of Barlow Road, County Road No. 2094, North 0°20'30" West, 1144.30 feet; Thence, leaving said line, North 89°39'30" East, 30.00 feet to a point on the east right of way line of said Barlow Road, said point also being on the west line of said Document Number 1994-015173 tract, said point also being the true point of beginning of the herein described tract; Thence, along said east right of way line, South 0°20'30" East, 198.49 feet to the intersection of said east line and the north right of way line of Zimmerman Road, County Road No. 273, said point also being the south line of said Document Number 1994-015173 tract; Thence, along said north line, South 89°13'13" East, 166.06 feet; Thence, leaving said north line, North 0°46'47" East, 10.00 feet; Thence, North 89°13'13" West, 146.25 feet; Thence, North 44°46'51" West, 14.28 feet; Thence, North 0°20'30" West, 178.68 feet; Thence, South 89°39'30" West, 10.00 feet to the true point of beginning.

Said tract of land contains 3,597 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

Property No. 04; Tax Lot 41E30 00402

TRACT 1 (Permanent Right Of Way Easement for Road Purposes)

A tract of land being a portion of that property described in Statutory Warranty Deed Document Number 2012-046237, Clackamas County Deed Records. Said tract of land being situated in the northeast quarter of Section 30, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southeast corner of said northeast quarter of said legal subdivision; Thence, along the east line of said northeast quarter, also being the centerline of Barlow Road, County Road Number 2094, North 0°20'30" West, 1041.63 feet; Thence, leaving said line, South 89°39'30" West, 30.00 feet to a point on the west right of way line of said Barlow Road, said point also being on the east line of that tract of land described in said Document Number 2012-046237, said point also being the true point of beginning of the herein described tract; Thence, along the west right of way line of said Barlow Road, South 0°20'30" East, 103.64 feet to the intersection of said west line and the north right of way line of Zimmerman Road, County Road No. 201; Thence, leaving said west line and along said north line, North 89°13'13" West, 106.41 feet; Thence, leaving said north line, North 0°46'47" East, 5.00 feet; Thence, South 89°13'13" East, 91.52 feet; Thence, North 44°40'06" East, 13.85 feet; Thence, North 0°20'30" West, 88.56 feet; Thence, North 89°39'30" East, 5.00 feet to the true point of beginning.

Said tract of land contains 1,073 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

TRACT 2 (Permanent Slope Easement)

A tract of land being a portion of that property described in Statutory Warranty Deed Document Number 2012-046237, Clackamas County Deed Records. Said tract of land being situated in the northeast quarter of Section 30, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southeast corner of said northeast quarter of said legal subdivision; Thence, along the east line of said northeast quarter, also being the centerline of Barlow Road, County Road Number 2094, North 0°20'30" West, 1041.63 feet; Thence, leaving said line, South 89°39'30" West, 35.00 feet to the true point of beginning of the herein described tract; Thence, South 0°20'30" East, 88.56 feet; Thence, South 44°40'06" West, 13.85 feet; Thence, North 89°13'13" West, 91.52 feet; Thence, North 0°46'47" East, 5.00 feet; Thence, Thence, South 89°13'13" East, 89.39 feet; Thence, North 44°40'06" East, 9.65 feet; Thence, North 0°20'30" West, 86.49 feet; Thence, North 89°39'30" East, 5.00 feet to the true point of beginning.

Said tract of land contains 949 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

TRACT 3 (Temporary Construction Easement)

A tract of land being a portion of that property described in Statutory Warranty Deed Document Number 2012-046237, Clackamas County Deed Records. Said tract of land being situated in the northeast quarter of Section 30, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southeast corner of said northeast quarter of said legal subdivision; Thence, along the east line of said northeast quarter, also being the centerline of Barlow Road, County Road Number 2094, North 0°20'30" West, 1144.30 feet; Thence, leaving said line, South 89°39'30" West, 30.00 feet to a point on the west right of way line of said Barlow Road, said point also being on the east line of that tract of land described in said Document Number 2012-046237, said point also being the true point of beginning of the herein described tract; Thence, along said west right of way line, South 0°20'30" East, 102.67 feet; Thence, leaving the west right of way line of said Barlow Road, South 89°39'30" West, 10.00 feet; Thence, South 0°20'30" East, 86.49 feet; Thence, South 44°40'06" West, 9.65 feet; Thence, North 89°13'13" West, 89.39 feet; Thence, South 0°46'47" West, 10.00 feet to a point on the north right of way line of Zimmerman Road, County Road No. 201; Thence along said north line, North 89°13'13" West, 10.00 feet; Thence, leaving said north line, North 0°46'47" East, 20.00 feet; Thence, Thence, South 89°13'13" East, 88.20 feet; Thence, North 44°40'06" East, 11.05 feet; Thence, North 0°20'30" West, 177.95 feet; Thence, North 89°39'30" East, 20.00 feet to the true point of beginning.

Said tract of land contains 4,055 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

Property No. 05; Tax Lot 41E30 02602

TRACT 1 (Permanent Right Of Way Easement for Road Purposes)

A tract of land being a portion of that property described in Quit Claim Deed Document Number 2008-048385, Clackamas County Deed Records. Said tract of land being situated in the northeast quarter of Section 30, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southeast corner of said northeast quarter of said legal subdivision; Thence, along the east line of said northeast quarter, also being the centerline of Barlow Road, County Road Number 2094, North 0°20'30" West, 895.98 feet; Thence, leaving said line, South 89°39'30" West, 30.00 feet to a point at the intersection of the west right of way line of said Barlow Road and the south right of way line of Zimmerman Road, County Road No. 201, said point also being the most northerly northeast corner of said Document Number 2008-048385

tract, said point also being the true point of beginning of the herein described tract; Thence, along the west right of way line of said Barlow Road, South 0°20'30" East, 20.00 feet, Thence, leaving said west line, North 89°13'13" West, 107.80 feet; Thence, North 0°46'47" East, 20.00 feet to a point on the south right of way line of said Zimmerman Road, also being the north line of said Document Number 2008-048385 tract; Thence, along said south line, South 89°13'13" East, 107.40 feet to the true point of beginning.

Said tract of land contains 2,152 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

TRACT 2 (Permanent Slope Easement)

A tract of land being a portion of that property described in Quit Claim Deed Document Number 2008-048385, Clackamas County Deed Records. Said tract of land being situated in the northeast quarter of Section 30, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southeast corner of said northeast quarter of said legal subdivision; Thence, along the east line of said northeast quarter, also being the centerline of Barlow Road, County Road Number 2094, North 0°20'30" West, 615.80 feet; Thence, leaving said line, South 89°39'30" West, 30.00 feet to a point on the west right of way line of said Barlow Road, said point also being the most easterly southeast corner of said Document Number 2008-048385 tract, said point also being the true point of beginning of the herein described tract; Thence, leaving said west line and along the south line of said Document Number 2008-048385 tract, North 89°13'13" West, 20.08 feet; Thence, North 45°20'09" East, 13.77 feet; Thence, North 0°49'28" East, 124.58 feet; Thence, North 89°39'30" East, 2.60 feet; Thence, South 43°03'47" East, 7.51 feet to a point on the west right of way line of said Barlow Road; Thence, along said west line, South 0°20'30" East, 129.04 feet to the true point of beginning.

Said tract of land contains 1,251 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

TRACT 3 (Permanent Slope Easement)

A tract of land being a portion of that property described in Quit Claim Deed Document Number 2008-048385, Clackamas County Deed Records. Said tract of land being situated in the northeast quarter of Section 30, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southeast corner of said northeast quarter of said legal subdivision; Thence, along the east line of said northeast quarter, also being the centerline of Barlow Road, County Road Number 2094, North 0°20'30" West, 787.66 feet; Thence, leaving said line, South 89°39'30" West, 30.00 feet to a point on the west right of way line of said Barlow Road, said point also being the true point of beginning of the herein described tract; Thence, leaving said west line, South 89°39'30" West, 15.09 feet; Thence, North 0°20'30" West, 88.60 feet; Thence,

South 89°13'13" East, 15.09 feet to a point on the west right of way line of said Barlow Road; Thence, along said west line, South 0°20'30" East, 88.31 feet to the true point of beginning.

Said tract of land contains 1,335 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

TRACT 4 (Temporary Construction Easement)

A tract of land being a portion of that property described in Quit Claim Deed Document Number 2008-048385, Clackamas County Deed Records. Said tract of land being situated in the northeast quarter of Section 30, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southeast corner of said northeast quarter of said legal subdivision; Thence, along the east line of said northeast quarter, also being the centerline of Barlow Road, County Road Number 2094, North 0°20'30" West, 615.80 feet; Thence, leaving said line, South 89°39'30" West, 30.00 feet to a point on the west right of way line of said Barlow Road; said point also being the most easterly southeast corner of said Document Number 2008-048385 tract; Thence, leaving said west line and along the south line of said Document Number 2008-048385 tract, North 89°13'13" West, 20.08 feet to the true point of beginning of the herein described tract; Thence, North 89°13'13" West, 85.48 feet; Thence, leaving said south line, North 0°20'30" West, 8.13 feet; Thence, South 90°00'00" East, 76.54 feet; Thence, North 31°17'48" East, 37.00 feet; Thence, South 0°49'28" West, 31.23 feet; Thence, South 45°20'09" West, 13.77 feet to the true point of beginning.

Said tract of land contains 1,085 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

TRACT 5 (Temporary Construction Easement)

A tract of land being a portion of that property described in Quit Claim Deed Document Number 2008-048385, Clackamas County Deed Records. Said tract of land being situated in the northeast quarter of Section 30, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southeast corner of said northeast quarter of said legal subdivision; Thence, along the east line of said northeast quarter, also being the centerline of Barlow Road, County Road Number 2094, North 0°20'30" West, 744.84 feet; Thence, leaving said line, South 89°39'30" West, 30.00 feet to a point on the west right of way line of said Barlow Road, said point also being the true point of beginning for the herein described tract; Thence, leaving said west line, North 43°03'47" West, 16.40 feet; Thence, South 89°55'42" West, 74.56 feet; Thence, North 0°00'00" East, 49.73 feet; Thence, North 90°00'00" East, 60.30 feet; Thence, North 0°20'30" West, 64.86 feet; Thence, North 89°13'13" West, 92.61 feet; Thence, North 0°46'47" East, 25.00 feet to a point on the south right of way line of Zimmerman Road, County Road No. 201, said point also being on the north line of said Document Number 2008-048385 tract; Thence, along said south right of way line, South 89°13'13" East, 9.81 feet; Thence, leaving

said south line, South 0°46'47" West, 20.00 feet; Thence, South 89°13'13" East, 92.70 feet; Thence, South 0°20'30" East, 88.60 feet; Thence, North 89°39'30" East, 15.09 feet to a point on the west right of way line of said Barlow Road; Thence, along said west line, South 0°20'30" East, 42.83 feet to the true point of beginning.

Said tract of land contains 5,388 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

Property No. 06; Tax Lot 41E30 02600

TRACT 1 (Permanent Storm Drainage Easement)

A tract of land being a portion of that property described in Statutory Warranty Deed Document Number 1998-007150, Clackamas County Deed Records. Said tract of land being situated in the northeast quarter of Section 30, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southeast corner of said northeast quarter of said legal subdivision, said point also being on the centerline of Barlow Road, County Road No. 2094; Thence, along the south line of said northeast quarter, North 89°13'13" West, 30.01 feet to a point on the west right of way line of said Barlow Road, said point also being the southeast corner of said Document Number 1998-007150 tract, said point also being the true point of beginning of the herein described tract; Thence, continuing along the south line of said northeast quarter, North 89°13'13" West, 60.28 feet; Thence, leaving said south line, North 33°15'12" West, 33.85 feet; Thence, North 0°20'30" West, 52.60 feet; Thence, South 89°39'30" West, 19.27 feet; Thence, North 0°20'30" West, 102.48 feet; Thence, North 89°39'30" East, 97.93 feet to a point on the west right of way line of said Barlow Road; Thence, along said west right of way line, South 0°20'30" East, 184.68 feet to the true point of beginning.

Said tract of land contains 16,151 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

TRACT 2 (Temporary Construction Easement)

A tract of land being a portion of that property described in Statutory Warranty Deed Document Number 1998-007150, Clackamas County Deed Records. Said tract of land being situated in the northeast quarter of Section 30, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the southeast corner of said northeast quarter of said legal subdivision, said point also being on the centerline of Barlow Road, County Road No. 2094; Thence, along said centerline, North 0°20'30" West, 447.81 feet; Thence, leaving said centerline, South 89°39'30" West, 30.00 feet to a point on the west right of way line of said Barlow Road said point also being the true point of beginning of the herein described tract; Thence, leaving said west line, South 89°39'30" West, 40.83 feet; Thence, North 0°20'30" West, 117.99 feet; Thence, South

89°39'30" West, 64.72 feet; Thence, North 0°20'30" West, 52.06 feet to a point on the north line of said Document Number 1998-007150 tract; Thence, along said north line, South 89°13'13" East, 105.56 feet to a point on the west right of way line of said Barlow Road; Thence, leaving said north line and along said west line, South 0°20'30" East, 167.99 feet to the true point of beginning.

Said tract of land contains 10,136 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

Property No. 07; Tax Lot 41E30 02700

TRACT 1 (Permanent Storm Drainage Easement)

A tract of land being a portion of that property described in Quitclaim Deed – Statutory Form Document Number 2011-021869, Clackamas County Deed Records. Said tract of land being situated in the southeast quarter of Section 30, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the northeast corner of said southeast quarter of said legal subdivision, said point also being the on the centerline of Barlow Road, County Road No. 2094; Thence, North 89°13'13" West, 30.01 feet to a point on the west right of way line of said Barlow Road, said point also being the northeast corner of said Document Number 2011-021869 tract, said point also being the true point of beginning of the herein described tract; Thence, along said west line, South 0°19'38" East, 91.90 feet; Thence, leaving said east line, North 33°15'12" West, 110.87 feet to a point on the north line of said Document Number 2011-021869 tract; Thence, tracing said north line, South 89°13'13" East, 60.28 feet to the true point of beginning.

Said tract of land contains 2,769 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

TRACT 2 (Permanent Slope Easement)

A tract of land being a portion of that property described in Quitclaim Deed – Statutory Form Document Number 2011-021869, Clackamas County Deed Records. Said tract of land being situated in the southeast quarter of Section 30, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the northeast corner of said southeast quarter of said legal subdivision, said point also being the on the centerline of Barlow Road, County Road No. 2094; Thence along said centerline, South 0°19'38" East, 91.32 feet; Thence, leaving said centerline, South 89°40'22" West, 30.00 feet to a point on the west right of way line of said Barlow Road, said point being the true point of beginning of the herein described tract; Thence, along said west right of way line, South 0°19'38" East, 210.63 feet; Thence, leaving said west line, North 7°53'53" West, 120.45 feet; Thence, North 2°15'27" West, 122.15 feet; Thence, South 33°15'12" East, 36.77 feet to the true point of beginning.

Said tract of land contains 2,825 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.

TRACT 3 (Temporary Construction Easement)

A tract of land being a portion of that property described in Statutory Quitclaim Deed – Statutory Form Document Number 2011-021869, Clackamas County Deed Records. Said tract of land being situated in the southeast quarter of Section 30, Township 4 South, Range 1 East of the Willamette Meridian, Clackamas County, Oregon, and more particularly described as follows:

Commencing at the northeast corner of said southeast quarter of said legal subdivision, said point also being the on the centerline of Barlow Road, County Road No. 2094; Thence along said centerline, South 0°19'38" East, 301.95 feet; Thence, leaving said centerline, South 89°40'22" West, 30.00 feet to a point on the west right of way line of said Barlow Road, said point being the true point of beginning of the herein described tract; Thence, along said west line, South 0°19'38" East, 60.54 feet; Thence, leaving said west line, South 89°40'22" West 25.00 feet; Thence, North 0°19'38" West, 60.54 feet; Thence, North 89°40'22" East, 25.00 feet to the true point of beginning.

Said tract of land contains 1,513 square feet more or less.

Basis of bearings for this description is held from SN 2013-047, Clackamas County Surveyor's Office.



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CAMPBELL M. GILMOUR
DIRECTOR

DEPARTMENT OF TRANSPORTATION AND DEVELOPMENT

DEVELOPMENT SERVICES BUILDING
150 BEAVERCREEK ROAD | OREGON CITY, OR 97045

April 25, 2013

Board of County Commissioner
Clackamas County

Members of the Board:

**Approval of Amendment Number 03 to Supplemental Project Agreement
No. 25070 between Clackamas County and the Oregon Department of
Transportation for Barlow Road – Zimmerman Road Intersection**

Purpose/Outcomes	This Supplemental Project Agreement Amendment will provide additional funding for the Barlow Road – Zimmerman Road Intersection Improvement Project.
Dollar Amount and Fiscal Impact	This amendment increases the total estimated cost of the project from \$1,590,000 to \$2,305,000.
Funding Source	High Risk Rural Roads Program (HRRRP): \$2,125,671 (increased from \$1,466,298) County Road Fund Match: \$179,329 (increased from \$123,702)
Safety Impact	This intersection has been identified on the County's Safety Priority Index System (SPIS) list as having significant safety issues and has been the location of several serious or fatal motor vehicle accidents. This project will eliminate the poor sight distance that exists at the intersection, which contributes to its poor safety rating.
Duration	Terminates upon completion of the Project and final payment or ten (10) calendar years following the date of original IGA execution (10/15/09), whichever is sooner.
Previous Board Action	03/27/08: ODOT/County Local Agency Certification Master Agreement No. 24688 executed. 09/10/09: ODOT/County Supplemental Project Agreement No. 25070 executed. 02/10/11: ODOT/County Amendment #1 to Supplemental Project Agreement No. 25070 executed. 04/26/12: ODOT/County Amendment #2 to Supplemental Project Agreement No. 25070 executed.
Contact Person	Joel Howie, Project Manager – DTD Engineering 503-742-4658

BACKGROUND:

The Barlow Road – Zimmerman Road Intersection has been identified on the County's Safety Priority Index System (SPIS) list as having significant safety issues and has been the location of several serious or fatal motor vehicle accidents. As part of the High Risk Rural Roads Program (HRRRP), Clackamas County is eligible to receive funding to carry out safety improvement projects on rural roads with identified safety issues to aid in reducing traffic fatalities and serious injuries. This project will eliminate the poor sight distance that exists to the south of the intersection by redesigning the vertical curve, widening the shoulders and clearing sight distance obstructions.

The additional funds included in this amendment are required to cover the project cost estimate as a result of design, environmental, and right of way issues that were identified at the 60% design milestone. Items identified include extending the project limits to adequately address the needed design elements, a water quality and detention pond, wetland mitigation requirements, additional earthwork, land use application and permit, and additional right of way and property negotiations.

Clackamas County is currently participating in the Local Agency Certification Program addressed in the Master Agreement (No. 24688). Through this program, the County and State may enter into and amend this Supplemental Project Agreement (No. 25070). This Supplemental Agreement allows the County to complete the identified safety improvements at the Barlow Road – Zimmerman Road Intersection. This project is one of the required test projects for Local Agency Certification.

This IGA has been reviewed and approved by County Counsel.

RECOMMENDATION:

Staff respectfully recommends that the Board of County Commissioners approves Amendment Number 03 to Supplemental Project Agreement No. 25070 with the Oregon Department of Transportation for the Barlow Road – Zimmerman Road Intersection.

Sincerely,



Mike Bezner, PE
Transportation Engineering Manager

AMENDMENT NUMBER 03
LOCAL AGENCY CERTIFICATION PROGRAM
High Risk Rural Roads Program
Supplemental Project Agreement No. 25070
Barlow Road: Zimmerman Road Intersection (Clackamas County)

The **State of Oregon**, acting by and through its Department of Transportation, hereinafter referred to as "State," and **Clackamas County**, acting by and through its elected officials, hereinafter referred to as "Agency," entered into Agreement No. 25070 on October 15, 2009, Amendment Number 01 on February 22, 2011 and Amendment Number 02 on May 11, 2012. Said Agreement covers reconstruction of a substandard vertical crest curve on Barlow Road to improve site distance at its intersection with Zimmerman Road.

It has now been determined by State and Agency that the Agreement referenced above shall be amended to increase the amount of federal funds available on this project. Except as expressly amended below, all other terms and conditions of the Agreement are still in full force and effect.

TERMS OF AGREEMENT, Paragraph 2, Page 2, which reads:

2. The total estimated cost of the Project is \$1,590,000, which is subject to change.

Shall be deleted in its entirety and replaced with the following:

2. The total estimated cost of the Project is \$2,305,000, which is subject to change.

TERMS OF AGREEMENT, Paragraph 3, Page 2, which reads:

3. The Project shall be conducted as a part of the federal HRRRP Program, a sub-program of the Highway Safety Improvement Program (HSIP) under title 23, section 148, United States Code. HRRRP funds for this Project shall be limited to \$1,466,298. The Project will be financed with HRRRP funds at the maximum allowable federal participating rate, with Agency providing the match plus any non-participating costs, including all costs in excess of the available federal funds.

Shall be deleted in its entirety and replaced with the following:

3. The Project shall be conducted as a part of the federal HRRRP Program, a sub-program of the Highway Safety Improvement Program (HSIP) under title 23, section 148, United States Code. HRRRP funds for this Project shall be limited to \$2,125,671. The Project will be financed with HRRRP funds at the maximum allowable federal participating rate, with Agency providing the match plus any non-participating costs, including all costs in excess of the available federal funds.

Agency/State
Agreement No. 25070-03

This Amendment may be executed in several counterparts (facsimile or otherwise) all of which when together shall constitute one agreement binding on all Parties, notwithstanding that all Parties are not signatories to the same counterpart. Each copy of this Amendment so executed shall constitute an original.

THE PARTIES, by execution of this Agreement, hereby acknowledge that its signing representatives have read this Agreement, understand it, and agree to be bound by its terms and conditions.

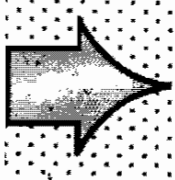
This Project is in the 2012-2015 Statewide Transportation Improvement Program, (Key #15578) that was adopted by the Oregon Transportation Commission on March 21, 2012 (or subsequently approved by amendment to the STIP).

Signature page to follow

Agency/State
Agreement No. 25-070-03

CLACKAMAS COUNTY, acting by and
through its Elected Officials

STATE OF OREGON, acting by and
through its Department of Transportation



By _____
Chair

By _____
Highway Division Administrator

Date _____

Date _____

By _____
Recording Secretary

APPROVAL RECOMMENDED

By _____
Technical Services Manager/
Chief Engineer

Date _____

Date _____

**APPROVED AS TO LEGAL
SUFFICIENCY**

By [Signature]
Agency Legal Counsel

By [Signature]
Region 1 Manager

Date 4/11/13

Date 3/14/13

Agency Contact:
Clackamas County
James Reese
Civil Engineering Associate
150 Beaver Creek Road
Oregon City, Oregon 97045
503-742-4707
jamesree@co.clackamas.or.us

By _____
Highway Finance Manager

Date _____

State Contact:
Oregon Dept. of Transportation
Mahasti Hastings
Local Agency Liaison
123 NW Flanders Street
Portland, Oregon 97209
503-731-8595
mahasti.v.hastings@odot.state.or.us

**APPROVED AS TO LEGAL
SUFFICIENCY**

By [Signature]
Assistant Attorney General

Date 3/13/13



6 COPY

CAMPBELL M. GILMOUR
DIRECTOR

DEPARTMENT OF TRANSPORTATION AND DEVELOPMENT

DEVELOPMENT SERVICES BUILDING
150 BEAVERCREEK ROAD | OREGON CITY, OR 97045

April 25, 2013

Board of County Commissioner
Clackamas County

Members of the Board:

Accepting the Traffic Safety Commission's 2012 Annual Report

Purpose/Outcomes	Acceptance of the Clackamas County Traffic Safety Commission's (TSC) 2012 Annual Report.
Dollar Amount and Fiscal Impact	NA
Funding Source	NA
Safety Impact	The TSC's primary duties and responsibilities are to work towards programs that reduce injuries and fatalities due to traffic crashes throughout the County.
Duration	This report reflects work completed by the TSC during the 2012 calendar year.
Previous Board Action	The BCC has accepted annual reports from the TSC since its inception in 1980.
Contact Person	Joe Marek, TSC Staff Liaison – DTD Engineering 503-742-4705

BACKGROUND:

The Clackamas County Traffic Safety Commission (TSC) is an advisory committee established by the Clackamas County Board of Commissioners in 1980. The primary duties and responsibilities of the TSC are to work towards programs that reduce injuries and fatalities due to traffic crashes throughout the County.

The TSC is very committed to the safety of the County's transportation system and have dedicated countless time, effort and expertise in their roles as members of this commission. They share in Clackamas County's firm belief that citizens can play an important part in the development of policies and programs for traffic safety in our County.

Attached please find the 2012 Traffic Safety Commission (TSC) annual report. The listed highlights and projects have been completed because of the energy and dedication of this very active group of citizens.

This report has been reviewed and approved by County Counsel.

RECOMMENDATION:

Staff respectfully recommends that the Board of County Commissioners accept the Traffic Safety Commission's annual report for 2012.

Sincerely,

Joseph A. Marek
Joseph Marek, PE, PTOE

TSC Staff Liaison



Transportation Safety Action Plan

Adopted November 2012

CLACKAMAS COUNTY TRANSPORTATION SAFETY ACTION PLAN

Clackamas County, Oregon

July 2012



K KITTELSON & ASSOCIATES, INC.
TRANSPORTATION ENGINEERS





TSC Role

- Served as Public Advisory Committee
 - Additional participants from Bike/Ped Committee staff
 - Transportation Maintenance Division
- Provided critical review and perspective





Clackamas County Crashes

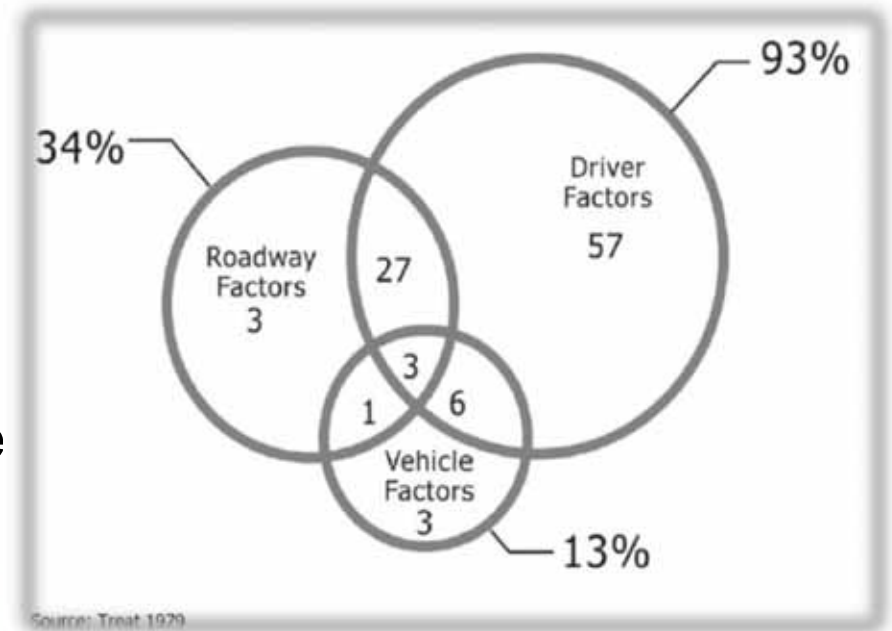
- Clackamas County – 4th out of 36 counties in Oregon for number of fatal and serious injury crashes (2010)
 - 3rd highest in population at 380,000
- What does that mean in terms of crashes
 - 2005 – 2009 (5 years)
 - All roads within County – 160 fatalities, 909 serious injury
 - County roads – 61 fatalities, 593 serious injury
 - What does all this cost?
 - Based on National Safety Council – Comprehensive Costs (2009)
 - All roads – Fatal: \$688 million; Serious Injury: \$197 million; **Total: \$885 million**
 - County – Fatal: \$262.3 million; Serious Injury: \$128.6 million; **Total: \$390.9 million**





- Education
 - Improve Skills and Awareness
 - Repeated Exposure
- Enforcement
 - Targeted
 - High-Visibility
- Engineering
 - Design, Construction, Operation, and Maintenance
- Emergency Services
 - Last Opportunity to Improve Health Outcomes
- Evaluation
 - Are Solutions Effective?

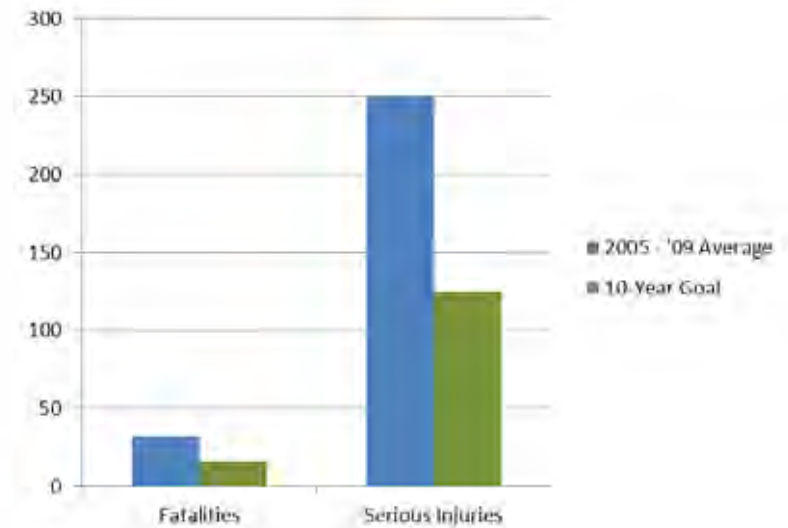
5E's ?





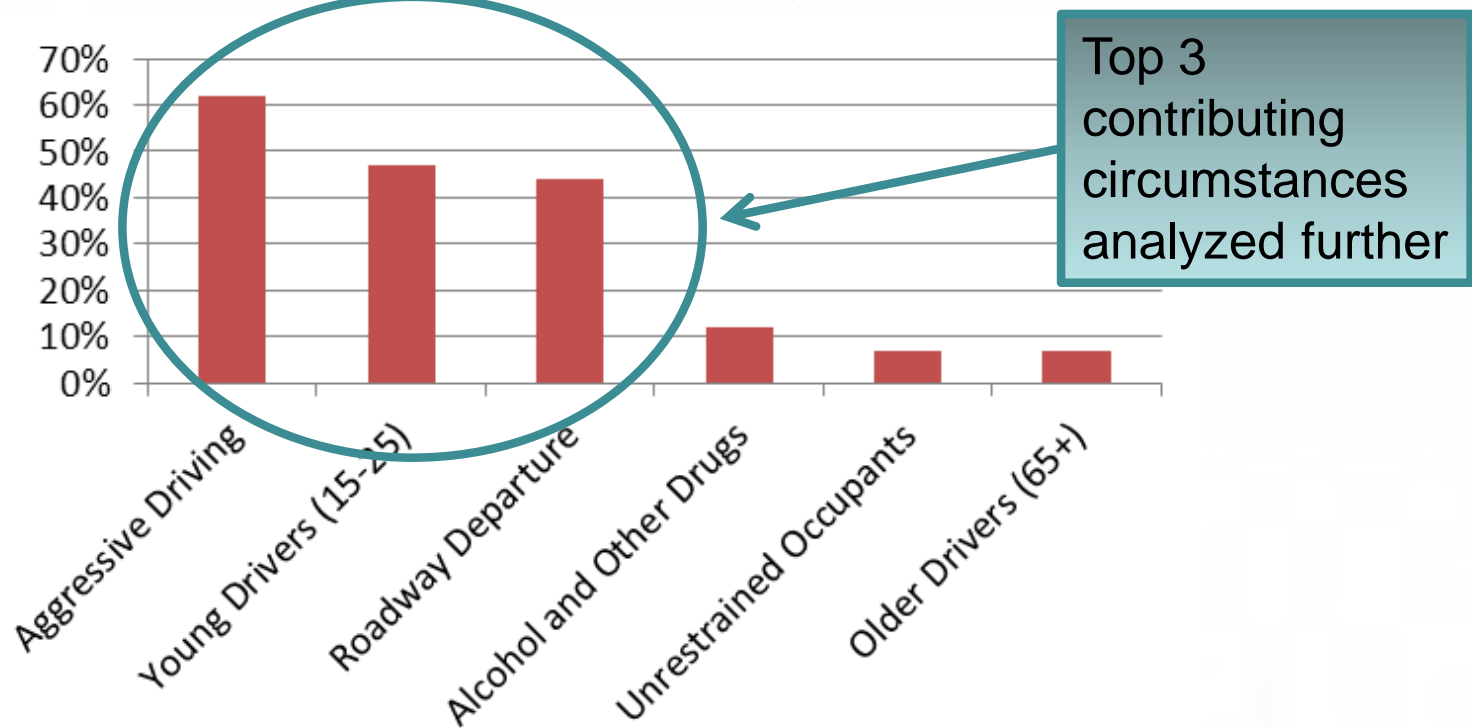
Goal

- Goal:
 - Reduce Fatal and Severe Injury Crashes by 50% in 10 Years



Clackamas County Crash Trends

Fatal & Severe Injury Contributing Circumstances





Summary

- Transportation Safety Action Plan is a Tool for...
 - Comprehensively and Proactively Addressing Safety
 - Coordinating Efforts among Stakeholders and Safety Interest Groups
 - Nurturing and Growing a Holistic Safety Culture
 - Integrating Safety in Planning, Design, Operations, and Maintenance
 - Reaching Safety Goals (e.g., Zero Transportation Fatalities)





Building a Safety Culture

- How do we do this...?
 - We know that the main contributing factor is the human!
 - Many collaboration partners needed-
 - Office of Children and Families
 - Juvenile Department
 - Traditional safety partners
 - Social Services Department
 - Housing Authority
 - Sheriff's Office
 - Cities within the County
 - Many more!



8



**WATER
ENVIRONMENT
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Beyond clean water.

**Water Quality Protection
Surface Water Management
Wastewater Collection & Treatment**

Michael S. Kuenzi, P.E.
Director

April 25, 2013

Board of County Commissioner
Clackamas County

Members of the Board:

Approval of a Joint Funding Agreement Between
Clackamas County Service District No.1 and the U.S. Geological Survey Department of the Interior
for the
Hoodland Wastewater Pollution Control Plant Effluent Outfall Alternatives Discharge Study

Purpose/Outcomes	Installation and operation of a stream flow gage on the Sandy River to obtain data reflecting fluctuations in water surface elevation. Data will be used to confirm the validity of an indirect effluent discharge alternative.
Dollar Amount and Fiscal Impact	Funds for the Hoodland Outfall Alternatives Study are budgeted in the FY2012-13 budget. Total cost is \$11,050.00. Cost to the District is \$6,640.00 and cost to the U.S. Geological Survey is \$4,410.00
Funding Source	Clackamas County Service District No.1 FY 2012-13 Annual Budget
Safety Impact	None
Duration	6 months
Previous Board Action	None
Contact Person	Michael S. Kuenzi, Director – Water Environment Services – 503-742-4560
Contract No.	To be established

BACKGROUND:

Frequent flooding of the Sandy River has impacted the Hoodland effluent discharge infrastructure on several occasions. The District, in coordination with the Department of Environmental Quality (DEQ), has agreed to look at potential alternatives to minimize or eliminate the need to be totally dependent on an effluent point source discharge to the Sandy River.

Staff is currently working on a pre-design for an indirect discharge concept from the Hoodland Wastewater Pollution Control Plant (WPCP). A critical component of developing this pre-design is to know the Sandy River water surface elevation throughout the year. There are no gauges close to the proposed project site and because of the significant change in grade upstream and downstream of the project site using data from the available gauges is not feasible.

Various approaches for obtaining the required river water elevation data have been investigated. The regional USGS staff has in- depth expertise in successfully designing, installing, monitoring, and maintaining river gauges in Pacific Northwest Rivers. Using the U.S. Geological Survey (USGS) is the recommended approach.

This agreement has been reviewed and approved by County Counsel.

RECOMMENDATION:

For these reasons, Staff recommends:

- 1) The Board of County Commissioners, acting as the governing body of Clackamas County Service District No.1 ("District"), approve the Joint Funding Agreement and
- 2) Authorize the Director of Water Environment Services to execute the Joint Funding Agreement between the U.S. Geological Survey United States Department of the Interior and the District without further Board action.

Respectfully submitted,



Michael Kuenzi, PE
Director



United States Department of the Interior

U.S. GEOLOGICAL SURVEY

Oregon Water Science Center
2130 SW 5th Avenue
Portland, OR 97201

(503) 251-3220 • Fax: (503) 251-3470

<http://or.water.usgs.gov/>

March 19, 2013

Mr. Michael Kuenzi
Water Environmental Services
Clackamas County Service District No. 1
15941 South Agnes Avenue
Oregon City, OR 97045

Dear Mr. Kuenzi,

This letter concerns our cooperative data collection program which will provide for the operation of a stream flow gage in Clackamas County. This gage will provide flow data for a six month period in 2013 on the Sandy River, at Emigrant Trail, near Wemme, Oregon.

Total cost to continue this program is \$11,050 for Federal fiscal year 2013 (October 1, 2012 to September 30, 2013). Cost to Clackamas County is \$6,640 and the U.S. Geological Survey will pay \$4,410 with Federal Matching Funds. The matching funds will go for the 2013 year installation and operation of the additional gage.

Attached are two original copies of a Joint Funding Agreement (JFA) to confirm our negotiations to continue this data collection program. Please sign both originals; return one signed original in the enclosed self-addressed envelope and retain the other original for your records.

In order to continue providing data and/or investigations for your agency, we will need to have the enclosed JFA signed and received in this office no later than April 28, 2013. If you feel that your agency cannot meet this target date, please let us know when we could expect to receive the signed JFA.

Funds are not required at this time; a signed agreement is not a bill, only an agreement to pay for the work that will be done. The Water Resources Cooperative Program operates under the authority of statute 43 USC 50 which allows us to perform this work. The Oregon Water Science Center DUNS number is 137883463. Billing will be by DI-1040. Final billing for Federal fiscal year 2013 will occur near the middle of July 2013.

Mr Kuenzi

Work performed with funds from this agreement will be conducted on a fixed-price basis. The results of all work under this agreement will be available for publication by the U.S. Geological Survey.

We look forward to continuing our successful relationship during the upcoming year. If you have any questions concerning this letter or the data program in general, please feel free to contact Keith Overton at (503) 251-3246 or Roy Weilman at (503)-251-3295.

Sincerely,

A handwritten signature in black ink, appearing to read "James D. Crammond". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

James D. Crammond
Center Director

Enclosures - 2 JFA's w/return envelope

Mr Kuenzi

cc: w/enclosures: Randy Rosane, Clackamas Water Environmental Services
Dar Crammond
Mary Burbank
Steve Winkler
Keith Overton



WATER
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Water Quality Protection
Surface Water Management
Wastewater Collection & Treatment

Michael S. Kuenzi, P.E.
Director

April 15, 2013

U.S. Geological Survey
United States Department of the Interior
Attn: Keith Overton, USGS-ORWSC
2130 SW 5th Avenue
Portland, Oregon 97201

Re: Exhibit A of the Joint Funding Agreement between USGS and Clackamas County Service District
No.1 for a stage sensor on the Sandy River near Emigrant Trail

Dear Mr. Overton:

This letter acknowledges that the Scope in Exhibit A (attached) of the Joint Funding Agreement is going to be adopted by both parties pursuant to Section 5 of the original agreement. If you have any questions or concerns please feel free to contact me at 503-742-4573.

Sincerely,

Randy Rosane, PE
Engineering Supervisor

Form 9-1366
(Oct. 2005)

**U.S. Department of the Interior
U.S. Geological Survey
Joint Funding Agreement**

Customer #: 6000001801
Agreement #:
Project #:
TIN #: 93-6002286
Fixed Cost Agreement Yes No

Page 1 of 2

**FOR
OREGON WATER SCIENCE CENTER**

THIS AGREEMENT is entered into as of the 1st day of October, 2012, by the U.S. GEOLOGICAL SURVEY UNITED STATES DEPARTMENT OF THE INTERIOR, party of the first part, and the CLACKAMAS COUNTY SERVICE DISTRICT NO.1, party of the second part.

1. The parties hereto agree that subject to availability of appropriations and in accordance with their respective authorities there shall be maintained in cooperation the operation of a stream flow gage on the Sandy River, near Emigrant Trail and Wemme, Oregon, herein called the program. The USGS legal authority is 43 USC 36C; 43 USC 50; and 43 USC 50b.
2. The following amounts shall be contributed to cover all of the cost of the necessary field and analytical work directly related to this program. 2(b) includes In-Kind Services in the amount of \$0.

(a) \$4,410 by the party of the first part during the period
October 1, 2012 to September 30, 2013

(b) \$6,640 by the party of the second part during the period
October 1, 2012 to September 30, 2013

(c) Additional or reduced amounts by each party during the above period or succeeding periods as may be determined by mutual agreement and set forth in an exchange of letters between the parties.

(d) The performance period may be changed by mutual agreement and set forth in an exchange of letters between the parties.

3. The costs of this program may be paid by either party in conformity with the laws and regulations respectively governing each party.
4. The field and analytical work pertaining to this program shall be under the direction of or subject to periodic review by an authorized representative of the party of the first part.
5. The areas to be included in the program shall be determined by mutual agreement between the parties hereto or their authorized representatives. The methods employed in the field and office shall be those adopted by the party of the first part to insure the required standards of accuracy subject to modification by mutual agreement.
6. During the course of this program, all field and analytical work of either party pertaining to this program shall be open to the inspection of the other party, and if the work is not being carried on in a mutually satisfactory manner, either party may terminate this agreement upon 60 days written notice to the other party.
7. The original records resulting from this program will be deposited in the office of origin of those records. Upon request, copies of the original records will be provided to the office of the other party.

Form 9-1366
continued

**U.S. Department of the Interior
U.S. Geological Survey
Joint Funding Agreement**

Customer #: 6000001801
Agreement #:
Project #:
TIN #: 93-6002286

- 8. The maps, records, or reports resulting from this program shall be made available to the public as promptly as possible. The maps, records, or reports normally will be published by the party of the first part. However, the party of the second part reserves the right to publish the results of this program and, if already published by the party of the first part shall, upon request, be furnished by the party of the first part, at costs, impressions suitable for purposes of reproduction similar to that for which the original copy was prepared. The maps, records, or reports published by either party shall contain a statement of the cooperative relations between the parties.
- 9. USGS will issue billings utilizing Department of the Interior Bill for Collection (form DI-1040). Billing documents are to be rendered **annually**. Payments of bills are due within 60 days after the billing date. If not paid by the due date, interest will be charged at the current Treasury rate for each 30 day period, or portion thereof, that the payment is delayed beyond the due date. (31 USC 3717; Comptroller General File 6-212222, August 23, 1983).

**U.S. Geological Survey
United States
Department of the Interior**

**Board of Commissioners, Governing Body of
Clackamas County Service District No.1**

USGS Point of Contact

Customer Point of Contact

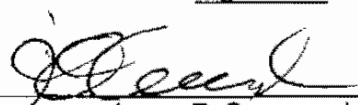
Name: Keith Overton
Address: USGS - ORWSC

2130 SW 5TH Avenue
Portland, Oregon 97201
Telephone: 503-251-3247
Email: koverton@usgs.gov

Name: Mr. Michael Kuenzi
Address: Water Environment Services, A Dept.
of Clackamas County
15941 South Agnes Avenue
Oregon City, Oregon 97045
Telephone:
Email:

Signatures

Signatures

By  Date 3/20/13
Name: James D. Crammond
Title: Center Director

By _____ Date _____
Name:
Title:

By _____ Date _____
Name:
Title:

By _____ Date _____
Name:
Title:

By _____ Date _____
Name:
Title:

By _____ Date _____
Name:
Title:

EXHIBIT A

Pursuant to Section 5 of the U.S. Department of the Interior U.S. Geological Survey Joint Funding Agreement for Oregon Water Science Center, the following documentation contained herein shall define the scope of the Agreement.

To: Randy Rosane (RandyRos@co.clackamas.or.us), Michael Kuenzi

A recon of the Sandy River near Emigrant Trail Road near Wemme, Oregon to determine an adequate location for a stage gage was performed in November, 2012 with personnel from CH2M Hill. This reach of the Sandy is highly unstable. The river bed is composed primarily of 'softball' sized round cobble and larger imbedded boulders, and therefore the bed is highly 'movable' and the river banks are subject to erosion. During lower flows the main channel comprises a small portion of the channel width and can be located anywhere within that channel width. These channel characteristics make finding a location to monitor stage over a range of elevations and time difficult.

A location was found near one of the ground water elevation wells at the eastward upstream end of the Emigrant Trail reach. The location has a small gage pool controlled by a section control and is protected by several upstream boulders and appears fairly stable given the general river characteristics.

Added 1/18/2013:

A criterion for the location of the gage was that it needed to be close to ground water wells for data comparison purposes. Given the highly mobile nature of the stream channel in this reach, changes in channel characteristics upstream of the proposed location may limit the usefulness of the proposed location. The current channel conditions hopefully will remain stable for 6 months to a year, the time frame for operation of the site indicated to us. If channel conditions change or monitoring continues beyond this initial period, a new monitoring site will need to be located with more stable channel conditions.

The unstable characteristics of the river bed limit the selection and application of stage sensing equipment available to us. Equipment mounted in-stream would most likely be subject to movement, degrading the reliability and usefulness of the data, therefore a downward looking radar gage will be used, mounted on a large well anchored tree at the river's edge, will keep us out of the water and report reliable data.

USGS will be responsible for the installation of stage sensors, data loggers, connections to and from equipment.

Costs for the installation and operation and maintenance of the gage during fiscal year 2013 follow:

6 month time frame:

Equipment rental:	\$2560.00
-------------------	-----------

Labor	\$2770.00
Operation/Maintenance	\$5720.00

Total cost for Clackamas County - $\$11,050.00 \times 60\% = \$6,630.00$

Total cost for USGS: \$4,410.00

60% is contingent upon approval of federal matching funds.

The Scope of Work is contained in Exhibit A attached hereto and incorporated herein. Let us know how to proceed. The availability of federal matching funds may lessen as the year progresses.

Regards,

Roy Wellman, Supervisory Hydrologic Technician
USGS Oregon Water Science Center
2130 SW 5th Avenue
Portland, Or 97201
503.251.3295 - office
503.251.3270 - fax
<http://or.water.usgs.gov>

March 19, 2013

Joint Funding Intergovernmental Agreement

Scope of Work

USGS and Clackamas County Service District No.1 (CCSD#1)

Sandy River near Emigrant Trail Road near Wemme, Oregon

The U. S. Geological Survey (USGS) Portland Field Office shall:

1. Be responsible for operation and maintenance of the USGS stage sensor, data logger, or telemetry equipment.
2. Be responsible for any connections to and from the above equipment and power source. Batteries as a power source will be provided by USGS.
3. Repair or replace any CCSD#1 equipment that was damaged due to acts by USGS personnel.
4. Contact CCSD#1 for permission to make any changes to structures not operated or maintained by USGS.
5. Send copies of field notes, inspections to the contractor within a week of a field trip.
6. Inform the USGS of obvious problems, corrections or malfunctions of CCSD#1's equipment noted during visits to the gage.
7. Make gage height observations during the 2013 water year, April 1 to Sept. 30.
8. Compute the provisional unit and daily value gage height on a real time basis and post it on the USGS web page. These data will be archived in the USGS national database. USGS shall maintain the gage web page to be accurate within reasonable expectations.
9. Provide final gage height data to CCSD#1 or its contractors when the data has been approved by USGS.

Clackamas County Service District No. 1 (CCSD#1) shall:

1. Inform the Portland Field Office of obvious problems, malfunctions, or corrections of USGS equipment noted during visits to the gage.
2. Send copies of field notes and inspections to the USGS within a week of a field trip.



**WATER
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9

Water Quality Protection
Surface Water Management
Wastewater Collection & Treatment

Michael S. Kuenzi, P.E.
Director

April 25, 2013

Board of County Commissioners
Clackamas County

Members of the Board:

**APPROVAL OF AMENDMENT NO. 1 TO THE CONSULTANT SERVICES AGREEMENT
BETWEEN KRS CONSULTING, CLACKAMAS COUNTY SERVICE DISTRICT NO. 1, AND
THE TRI-CITY SERVICE DISTRICT**

Purpose/Outcomes	Amendment No. 1 is for a contract with KRS Consulting to utilize the Consultant's expertise in assisting with the Asset Management Program and its efforts to characterize and prioritize maintenance and replacement schedules based on risk and performance factors.
Dollar Amount and Fiscal Impact	The maximum contract value is increased by \$15,000.00, raising the total contract value to \$40,000.00. The contract is funded through Asset Management budgetary funds.
Funding Source	Tri-City and Clackamas County Service District No. 1 approved budget. No County General Funds are involved.
Safety Impact	None.
Duration	Effective April 29, 2013, and terminates on June 30, 2013.
Previous Board Action	None.
Contact Person	Mike Kuenzi, Director - Water Environment Services – 503-742-4560
Contract No.	

BACKGROUND:

The WES Asset Management program is building a comprehensive asset registry and assigning risk and consequence ratings to those assets based on current conditions, criticality and economic impact for replacement or rehabilitation of the assets owned by the Tri-City Service District and Clackamas County Service District No. 1. This is the vital process in building a formalized Asset Management program to achieve financial efficiencies, stronger governance and accountability, improved customer service, reduce risk exposure and establish a more sustainable decision making process.

KRS Consulting has over twenty years of firsthand knowledge with the collection systems in both districts and brings his historical and factual knowledge of the functionality of the assets and process to this project.

In order to building the registry and assessing the condition of the assets, focusing on the pump stations within each district, a contract amendment is required. The Districts anticipate that the Consultant's services will be needed for an additional Twenty (20) to Twenty-Five (25) working days up to a maximum, not-to-exceed amount of Fifteen Thousand Dollars (\$15,000) at an

Serving Clackamas County, Gladstone, Happy Valley, Johnson City, Milwaukie, Oregon City, Rivergrove and West Linn.
150 Beaver Creek Road, Oregon City, Oregon 97045 Telephone: (503) 742-4567 Facsimile: (503) 742-4565
www.clackamas.us/wes/

Board of Commissioners
April 25, 2013
Page 2

hourly rate of Seventy-Five Dollars (\$75) This contract has been reviewed and approved by County Counsel.

RECOMMENDATION:

District staff respectfully recommends that:

- 1) The Board of County Commissioners, acting as the governing body of Clackamas County Service District No. 1 and the Tri-City Service District, approve Amendment No. 1 to the Agreement between KRS Consulting, Clackamas County Service District No. 1, and Tri-City Service District to increase allowed payments by the amount of \$15,000 to a total of \$40,000; and
- 2) Authorize the Director of Water Environment Services to execute Amendment No. 1.

Respectfully submitted,



Michael Kuenzi
Director

AMENDMENT NO. 1
TO
AGREEMENT TO FURNISH SERVICES TO
CLACKAMAS COUNTY SERVICE DISTRICT NO. 1
AND
TRI CITY SERVICE DISTRICT

This AMENDMENT NO. 1 to the AGREEMENT TO FURNISH SERVICES (this "Amendment No. 1"), made and entered into on _____, 2013, by and between CLACKAMAS COUNTY SERVICE DISTRICT NO. 1 and TRI-CITY SERVICE DISTRICT, each a county service district formed under Oregon Revised Statutes 451 (together, the "District"), and KRIS R. SAYRE d/b/a KRS CONSULTING, an individual (the "Consultant"), for performing consulting services, herein after referred to as the "Project."

WHEREAS, the parties entered into that certain Agreement to Furnish Services dated August 7th, 2012 for professional services relating to asset management and assessment of infrastructure utilizing knowledge Consultant possesses given his prior management of infrastructure maintenance for the District (the "Agreement"); and

WHEREAS, the parties desire to continue and extend the services related to the Project and provided under the Agreement by expanding the arrangement to include an increase in the Consultant's required hours of availability and increasing the maximum compensation contained therein.

NOW, THEREFORE, for good and sufficient consideration, the parties hereby agree that:

1. To reflect an increase in the maximum compensation by \$15,000.00, the Agreement's Paragraph 5.1.1 is hereby replaced in its entirety with:

- 5.1.1 The District agrees to pay the Consultant SEVENTY-FIVE and 00/100 Dollars (\$75.00) per hour, not to exceed FORTY THOUSAND and 00/100 Dollars (\$40,000.00) (the "Maximum Amount"). Notwithstanding anything else to the contrary herein, no changes in the Maximum Amount shall be made without prior written approval of the District.

AMENDMENT 1
AGREEMENT TO FURNISH SERVICES
Page 2

2. To reflect an increase in the number of hours required by the Consultant and the corresponding not-to-exceed amount on the schedule, Exhibit B is hereby replaced in its entirety with:

Schedule

The District plan is to use the Consultant's services on an on-call basis during normal business hours. The Districts anticipate that the Consultant's services will be needed for approximately sixty-six (66) working days, up to a maximum, not-to-exceed amount of Forty Thousand Dollars (\$40,000.00) at an hourly rate of Seventy-Five Dollars (\$75).

CONSULTANT:

CLACKAMAS COUNTY SERVICE
DISTRICT NO. 1

KRS Consulting
Company

Chair

15775 S. Maplelane Road
Oregon City, OR 97045
Address

Date

Kris R. Sayce
Authorized Signature
Owner

TRI-CITY SERVICE DISTRICT

Chair

Federal Tax ID Number

APRIL 17, 2013
Date

Date