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BEFORE THE BOARD OF COUNTY COMMISSIONERS
FOR COLUMBIA COUNTY, OREGON

In the Matter of Adopting the Columbia County System Development Charge Ordinance	))	Ordinance No. 2007-1

The Board of County Commissioners for Columbia County, Oregon, ordains as follows:

SECTION 1. TITLE.

This Ordinance shall be known as Ordinance No. 2007-1.

SECTION 2. AUTHORITY.

This Ordinance is adopted pursuant to ORS 203.035, and ORS 223.297 through ORS 223.314.

SECTION 3. PURPOSE.

The purpose of this Ordinance is to adopt the Columbia County System Development Charge Ordinance.

SECTION 4. FINDINGS.

The Board of County Commissioners adopts the following findings:

1. Developers should contribute their fair share to the cost of improvements and additions to the transportation and parks and recreation facilities that are required to accommodate the needs of growth. Development has a direct effect on the Transportation and Parks and Recreation facilities in the County.

2. The imposition of system development charges will provide a source of revenue to fund the construction or improvement of facilities which are necessitated by growth.

3. ORS 223.297 through 223.314, originally adopted in 1989, authorizes local governments to impose system development charges.

4. System development charges are charges incurred upon the decision to develop property at a specific use, density, and/or intensity, and the incurred charge equals, or is less than the actual cost of providing public facilities commensurate with the needs of the chosen use, density, and/or intensity.

5. Decisions regarding uses, densities, and/or intensities cause direct and proportional charges in the amount of the system development charge.

6. System development charges are separate from and in addition to any applicable tax, assessment, charge, fee in lieu of assessment, or other fee provided by law or imposed as a condition of development.

7. System development charges are fees for services because they are based upon receipt of services considering the specific nature of the development.

8. System development charges are imposed on the activity of development, not on the land, owner, or property, and, therefore, are not taxes on property or on a property owner as a direct consequence of ownership of property within the meaning of Section 11b, Article XI of the Oregon Constitution or the legislation implementing that Section.

9. The County has reviewed the system development charge methodology reports for the City of Scappoose and the City of St. Helens, which are applicable to system development chargers in the urban growth areas of such cities.

SECTION5. AMENDMENT AND AUTHORIZATION.

The Board of County Commissioners hereby adopts the Columbia County System Development Charge Ordinance, which is attached hereto as Attachment 1, and is incorporated herein by this reference.

SECTION 6. SEVERABILITY.

The provisions of this Ordinance are severable. If any provision of this Ordinance is determined to be invalid by a court of competent jurisdiction, such provision shall be considered a separate, distinct and independent provision and the decision shall not effect the validity of the remaining portions hereof.

APPROVED AS TO FORM

By: _____
County Counsel

Attest:

By: _____
Jan Greenhalgh, Recording Secretary

First Reading: 2-7-07
Second Reading: 2-21-07
Effective Date: 5-22-07

BOARD OF COUNTY COMMISSIONERS
FOR COLUMBIA COUNTY, OREGON

By: _____
Rita Bernhard, Chair

By: _____
Anthony Hyde, Commissioner

By: _____
Joe Corsiglia, Commissioner

ATTACHMENT 1

COLUMBIA COUNTY SYSTEM DEVELOPMENT CHARGE ORDINANCE

SECTION 1 DEFINITIONS.

A. "Applicant" shall mean the owner or other person who applies for a building or development permit within the unincorporated boundaries of Columbia County.

B. "Board" shall mean the Columbia County Board of Commissioners.

C. "Building" shall mean any structure, either temporary or permanent, built for the support, shelter or enclosure of persons, chattels or property of any kind. This term shall include tents, trailers, mobile homes or any vehicles serving in any way the function of a building. This term shall not include temporary construction sheds or trailers erected to assist in construction.

D. "Building permit" shall mean an official document or certificate authorizing the construction or siting of any building. For purposes of this ordinance, the term, "Building permit" shall also include any construction or installation permits which may be required for those structures or buildings, such as mobile homes, that do not require a building permit in order to be occupied.

E. "Capital improvement" shall mean public facilities or assets used for Transportation or Parks and Recreation. Capital Improvement does not include costs of the operation or routine maintenance of Capital Improvements.

F. "Citizen or other interested person" shall mean any person whose legal residence is within the boundaries of Columbia County, as evidenced by registration as a voter within the County, or by other proof of residency; or a person who owns, occupies, or otherwise has an interest in real property which is located within County boundaries or is otherwise subject to the imposition of system development charges, as outlined in Section III of this Ordinance.

G. "County" shall mean Columbia County, Oregon.

H. "Development" shall mean construction of a building or other construction, or making a physical change in the use of a structure or land, in a manner which increases the usage of any capital improvement or which will contribute to the need for additional or enlarged capital improvements.

I. "Development Permit" shall mean an official document or certificate authorizing development other than a building permit, or a permit issued under the Columbia County Zoning Ordinance or Columbia County Subdivision and Partitioning Ordinance, authorizing development.

J. "Dwelling unit" shall mean a building or a portion of a building designed for residential occupancy, consisting of one or more rooms which are arranged, designed or used as living quarters for one family only.

K. "Encumbered" shall mean moneys committed by contract or purchase order in a manner that obligates the County to expend the encumbered amount upon delivery of goods, the rendering of services, or the conveyance of real property provided by a vendor, supplier, contractor or owner.

L. "Improvement fee" shall mean a fee for costs associated with capital improvements to be constructed after the effective date of this ordinance. Notwithstanding anything in this ordinance to the contrary, it is an incurred charge or cost based upon the use of or the availability for use of the systems and capital improvements required to provide services and facilities necessary to meet the routine obligations of the use and ownership of property, and to provide for the public health and safety upon development.

M. "Owner" shall mean the person(s) holding legal title to real property upon which development is to occur.

N. "Person" shall mean an individual, a corporation, a partnership, an incorporated association, or any other similar entity.

O. "Qualified public improvement" shall mean a capital improvement that is:

1. Required as condition of development approval;

2. Identified in the capital improvement plan adopted pursuant to Section IV(D), and is either:

    a. Not located on or contiguous to property that is the subject of development approval; or

    b. Located in whole or in part on or contiguous to property that is the subject of development approval and required to be built larger or with greater capacity than is necessary for the particular development project to which the improvement fee is related.

P. "Reimbursement fee" shall mean a fee for costs associated with capital improvements

already constructed or under construction on the date of this ordinance. Notwithstanding anything in this ordinance to the contrary, it is an incurred charge or cost based upon the use of or the availability for use of the systems and capital improvements required to provide services and facilities necessary to meet the routine obligations of the use and ownership of property, and to provide for the public health and safety upon development.

Q. "Rural County" shall mean the areas of Columbia County outside the city limits of its incorporated cities, and outside the Urban Growth Boundaries of the City of St. Helens and the City of Scappoose.

R. "System development charge" shall mean a reimbursement fee, improvement fee, or a combination thereof assessed or collected at the time of issuance of a development or building permit or connection to a capital improvement. System development charges are separate from and in addition to any applicable tax, assessment, fee in lieu of assessment, or other fee or charge provided by law or imposed as a condition of development. A system development charge does not include any fees assessed or collected as part of a local improvement district or a charge in lieu of a local improvement district assessment, or the cost of complying with requirements or conditions imposed upon a land use decision, expedited land division or limited land use decision.

S. "System development charge methodology" shall mean the methodology reports adopted pursuant to Section III(B), as amended and supplemented pursuant to Section III(H).

SECTION II. RULES OF CONSTRUCTION.

For purposes of administration and enforcement of this Ordinance, unless otherwise stated in this ordinance, the following rules of construction shall apply:

A. In case of any difference of meaning or implication between the text of this ordinance and any caption, illustration, summary table, or illustrative table, the text shall control.

B. The word "shall" is always mandatory and not discretionary; the word "may" is permissive.

C. Words used in the present tense shall include the future; words used in the singular shall include the plural and the plural the singular, unless the context clearly indicates the contrary; and use of the masculine gender shall include the feminine gender.

D. The phrase "used for" includes "arranged for", "designed for", "maintained for" or "occupied for".

E. Unless the context clearly indicates the contrary, where a regulation involves two or more items, conditions, provisions, or events connected by the conjunction "and", "or" or "either...or", the conjunction shall be interpreted as follows:

1. "And" indicates that all the connected terms, conditions, provisions or events shall apply.

2. "Or" indicates that the connected items, conditions, or provisions or events may apply singly or in any combination.

3. "Either...or" indicates that the connected items, conditions, provisions or events shall apply singly but not in combination.

F. The word "includes" shall not limit a term to the specific example, but is intended to extend its meaning to all other instances or circumstances of like kind or character.

SECTION III. IMPOSITION OF SYSTEM DEVELOPMENT CHARGES.

System development charges are hereby imposed, as follows:

A. Development Subject to Charges.

System development charges are imposed on all development within the unincorporated boundaries of the County for capital improvements for Transportation, and Parks and Recreation. The system development charges shall be paid in addition to all other fees, charges and assessments due for development.

B. Rates of Charges.

1. The County hereby adopts the report entitled "Feasibility and Implementation of System Development Charges: Parks and Transportation dated August, 2006, including, without limitation, the methodology for determining system development charge rates, which is attached hereto as Exhibit 1, and is incorporated herein by this reference. System development charges, as shown in Exhibit 2, which is attached hereto and is incorporated herein by this reference, shall be imposed and calculated for development in the Rural County.

2. The County hereby adopts the report entitled "City of St. Helens, Oregon System Development Charge Study", which is attached hereto as Exhibit 3, and is incorporated herein by this reference. The County shall charge the City of St. Helens' system development charges for transportation and parks, as set forth in Exhibit 3, within the City of St. Helens Urban Growth Boundary.

3. The County hereby adopts the report entitled "City of Scappoose Transportation System Development Charges", which is attached hereto as Exhibit 4, and is incorporated herein by this reference. The County shall charge the City of Scappoose's system development charges for transportation, as set forth in Exhibit

4, within the City of Scappoose Urban Growth Boundary.

4. The County hereby adopts the report entitled "City of Scappoose Parks and Recreation Capital Facilities Plan and System Development Charges Methodology Report, which is attached hereto as Exhibit 5, and is incorporated herein by this reference. The County shall charge the City of Scappoose's system development charge for parks, as set forth in Exhibit 5.

5. System development charges as shown in Exhibit 2, shall be adjusted annually according to the Engineering News Record (ENR) Construction Cost Index (CCI) for the City of Seattle.

6. System development charges shall be calculated based on the rates in effect on the date that a building permit application is submitted to the Land Development Services Department.

C. Administration Surcharge.

Notwithstanding any other provision of this ordinance, for the purpose of partially defraying the cost of administering this ordinance and collecting the fees imposed hereby, there is imposed a surcharge in the amount of five (5) percent of the total system development charges collected for each development in the Rural County.

D. Payment of Charges.

Except as otherwise provided in this ordinance, an applicant for a building permit shall pay the applicable system development charges prior to the issuance of the permit.

E. Exemptions.

The following development shall be exempt from payment of the system development charges:

1. Non-residential development shall be exempt from a Parks and Recreation system development charge.

2. Alteration , expansion or replacement of an existing dwelling unit where no additional dwelling units are created.

3. The construction of accessory buildings or structures which will not create additional dwelling units if such accessory buildings or structures will not create additional demands on the County's capital improvements.

F. Credits for Developer Contributions of Qualified Public Improvements.

The County may grant a credit against system development charges imposed pursuant to Section III(A)and (B) for the construction of a Qualified Public Improvement. Such construction shall be subject to the approval of the County.

1. The credit provided shall only be for the improvement fee charged for the type of improvement being constructed, and credit for qualified public improvements may be granted only for the cost of that portion of such improvement that exceeds the County's minimum standard facility size or capacity needed to serve the particular development project or property.

2. The applicant has the burden of demonstrating that a particular improvement qualifies for credit under subsection (4)(b) of this section.

3. The County may deny the credit provided in this subsection if the County determines that the application does not meet the requirements of this subsection, or by reference to the capital improvement list, adopted pursuant to ORS 223.309, that the improvement for which credit is sought was not included in the plan and list adopted pursuant to ORS 223.309.

4. When the construction of a qualified public improvement gives rise to a credit amount greater than the improvement fee that would otherwise be levied against he project receiving development approval, the excess credit may be applied against improvement fees that accrue in subsequent phases of the original development project. No credits shall be provided for a capital improvement not identified in the plan and list adopted pursuant to ORS 223.309.

5. Credits must be used within 5 years from the date the credit is given.

6. The amount of developer contribution credit to be applied shall be determined as follows:

   a. The cost of anticipated construction of qualified public improvements shall be based upon cost estimated certified by a professional architect or engineer.

   b. Prior to issuance of a building or development permit, the applicant shall submit to the Board, or its designee a proposed plan and estimate of cost for contributions to one or more Qualified Public Improvements. The proposed plan and estimate shall include:

      i. a designation of the development for which the proposed plan is being submitted;

ii. a legal description of any land proposed to be donated and a written appraisal prepared in conformity with this Section;

iii. a list of the contemplated capital improvements contained within the plan;

iv. an estimate of proposed construction costs certified by a professional architect or engineer; and

v. a proposed time schedule for completion of the proposed plan.

c. The Board, or its designee shall determine if the proposed qualified public improvement is:

i. Required as a condition of development approval;

ii. Identified in the capital improvement plan

iii. Not located on or contiguous to property that is the subject of development approval or located in whole or in part on or contiguous to property that is the subject of development approval and required to be built larger or with greater capacity than is necessary for the particular development project to which the improvement fee is related.

7. The decision of the Board, or its designee as to whether to accept the proposed plan of contribution and the value of such contribution shall be in writing. A copy shall be provided to the applicant.

8. Any applicant who submits a proposed plan pursuant to this Section and desires the immediate issuance of a building permit or development permit shall pay the applicable system development charges. Said payment shall be deemed paid under "protest" and shall not be construed as a waiver of any review rights. Any difference between the amount paid and the amount due, as determined by the Board, or its designee, shall be refunded to the applicant.

9. In the event the amount of developer contribution determined to be applicable by the Board, or its designee pursuant to an approved plan of contribution exceeds the total amount of system development charges due by the applicant, the County shall execute with the applicant an agreement for future reimbursement of the excess of such contribution credit from future receipts by the County of other system development charges. Such agreement of reimbursement shall not be for a period in

excess of five years from the date of completion of the approved plan of contribution and shall provide for a forfeiture of any remaining reimbursement balance at the end of such five year period.

G. Appeals and Review Hearings.

1. An applicant who is required to pay system development charges shall have the right to request a hearing to review the denial of any of a proposed credit for contribution of qualified public improvements pursuant to Section III(F).

2. Such hearing shall be requested by the applicant within thirty (30) days of the date of first receipt of the denial. Failure to request a hearing within the time provided shall be deemed a waiver of such right.

3. The request for hearing shall be filed with the Board of County Commissioners and shall contain the following:

   a. The name and address of the applicant;

   b. The legal description of the property in question;

   c. If issued, the date the building permit, development permit, or connection was issued;

   d. A brief description of the nature of the development being undertaken pursuant to the building permit, development permit, or connection;

   e. If paid, the date the system development charges were paid; and

   f. A statement of the reasons why the applicant is requesting the hearing.

4. Upon receipt of such request, the County shall schedule a hearing before the Board of County Commissioners at a regularly scheduled meeting or a special meeting called for the purpose of conducting the hearing and shall provide the applicant written notice of the time and place of the hearing.

5. Such hearing shall be before the Board of County Commissioners and shall be conducted in a manner designed to obtain all information and evidence relevant to the requested hearing.

6. Any applicant who requests a hearing pursuant to this Section and desires the immediate issuance of a building permit, development permit, or connection shall pay prior to or at the time the request for hearing is filed the applicable system

development charges pursuant to Section III(B). Said payment shall be deemed paid under "protest" and shall not be construed as a waiver of any review rights.

7. An applicant may request a hearing under this Section without paying the applicable system development charges, but no building permit, development permit, or connection shall be issued until such system development charges are paid in the amount initially calculated or the amount approved upon completion of the review provided in this section.

8. The County shall advise a person who makes a written objection to the calculation of a system development charge of the right to petition for review pursuant to ORS 34.010 to 34.100.

H. Biennial Review of Methodology and Rates.

This ordinance and the system development charges methodology shall be reviewed at least once every two years. The review shall consider new estimates of population and other socioeconomic data, changes in the cost of construction and land acquisition, and adjustments to the assumptions, conclusions or findings set forth in the methodology adopted by Section III(B). The purpose of this review is to evaluate and revise, if necessary, the rates of the system development charges to assure that they do not exceed the reasonably anticipated costs of the County's capital improvements. In the event the review of the ordinance or the methodology alters or changes the assumptions, conclusions and findings of the methodology, or alters or changes the amount of system development charges, the methodology adopted by reference in Section III(B) shall be amended and updated to reflect the assumptions, conclusions and findings of such reviews and Section III(B) shall be amended to adopt by reference such updated studies. However, no increase shall be imposed in excess of the index without a hearing before the Board of County Commissioners.

SECTION IV. RECEIPT AND EXPENDITURE OF SYSTEM DEVELOPMENT CHARGES.

A. Trust Accounts.

The County hereby establishes separate trust accounts to be designated as the "Transportation SDC Account" and the "Parks and Recreation SDC Account", which shall be maintained separate and apart from all other accounts of the County. All system development charge payments shall be deposited into the appropriate trust account immediately upon receipt. Any funds on deposit in system development charges trust accounts which are not immediately necessary for expenditure shall be invested by the County. All income derived from such investments shall be deposited in the system development charge trust accounts and used as provided herein. The County shall provide system development charge accountings in accordance with ORS 223.311, as amended.

B. Use of System Development Charges.

The moneys deposited into the trust accounts shall be used solely for the purpose of providing capital improvements which provide for the increased capacity necessitated by development, including, but not limited to:

1. design and construction plan preparation;

2. permitting and fees;

3. land and materials acquisition, including any costs of acquisition or condemnation;

4. construction of capital improvements;

5. design and construction of new drainage facilities required by the construction of capital improvements and structures;

6. relocating utilities required by the construction of improvements and structures;

7. landscaping;

8. construction management and inspection;

9. surveying, soils and material testing;

10. acquisition of capital equipment;

11. repayment of moneys transferred or borrowed from any budgetary fund of the County which were used to fund any of the capital improvements as herein provided;

12. payment of principal and interest, necessary reserves and costs of issuance under any bonds or other indebtedness issued by the County to fund capital improvements;

13. direct costs of complying with the provisions of ORS 223.297 to 223.314, including the costs of developing system development charges methodologies and providing an accounting of system development charge expenditures;

14. administrative costs associated with collection of system development charge revenues; and

15. environmental testing and mitigation.

C. Prohibited Uses of System Development Charges.

1. Funds on deposit in system development charge trust accounts shall not be used for:

   a. Any expenditure that would be classified as a maintenance or repair expense; or

   b. Costs associated with the construction of administrative office facilities that are more than an incidental part of other capital improvements.

2. Rural transportation system development charges shall not be spent outside of the district from which they are collected. The district boundaries are depicted on the map which is attached hereto as Exhibit 5, and is incorporated herein by this reference.

D. Capital Improvements Authorized to be Financed by System Development Charges.

Any capital improvement being funded wholly or in part with system development charge revenues shall be included in the County's capital improvement plan. The capital improvement plan may be modified at any time in accordance with ORS 223.309, as amended, and shall:

1. list the specific capital improvement projects that the County intends to fund with the system development charge revenues;

2. provide the estimated cost of each capital improvement project;

3. provide the estimated timing of each capital improvement project; and

4. provide the percentage of costs eligible to be funded with revenues from the improvement fee for each improvement.

E. Refunds of System Development Charges.

System development charges shall be refunded in accordance with the following requirements:

1. An applicant or owner shall be eligible to apply for a refund if:

   a. The applicable building permit, development permit or connection has expired and the development authorized by such permit is not complete; or

   b. No system development charges have not been expended or encumbered prior

to the end of the fiscal year immediately following the sixth anniversary of the date upon which such charges were paid. For the purposes of this Section, system development charges collected shall be deemed to be expended or encumbered on the basis of the first system development charges in shall be the first system development charges out.

2. The application for refund shall be filed with the County and contain the following:

   a. The name and address of the applicant;

   b. The location of the property which was the subject of the system development charge;

   c. A notarized sworn statement that the petitioner is the then current owner of the property on behalf of which the system development charges were paid, including proof of ownership, such as a certified copy of the latest recorded deed;

   d. The date the system development charges were paid;

   e. A copy of the receipt of payment for the system development charges; and,

   f. The date the building permit, development permit, or connection was issued and the date of expiration, if applicable.

3. The application shall be filed within ninety (90) days of the expiration of the building permit, development permit, or connection, or within ninety (90) days of the end of the fiscal year following the sixth anniversary of the date upon which the system development charges were paid. Failure to timely apply for a refund of the system development charges shall waive any right to a refund.

4. Upon receipt of an application for refund, the County will advise the applicant of the status of the request for refund, and if such request is valid, the system development charges shall be returned to the applicant.

5. An applicant for a building permit, development permit, or connection which is subsequently issued for a development on the same property which was the subject of a refund shall pay the systems development charges as required by Section III.

F. Challenge of Expenditures.

Any Citizen or other Interested Person, as defined in Section I(F), may challenge an expenditure of system development charge revenues, as follows:

1. Any such challenge must be received in writing by the County Board of Commissioners within two years following the subject expenditure, and shall include the following information:

   a. The name and address of the citizen or other interested person challenging the expenditure, as well as a statement as to how the challenger qualifies as a citizen or other interested person;

   b. The amount of the expenditure, the project, payee or purpose, and the approximate date on which it was made; and

   c. The reason why the expenditure is being challenged.

2. If the County determines that the expenditure was not made in accordance with the provisions of this ordinance and other relevant laws, a reimbursement of system development charges trust account revenues from other revenue sources shall be made within one year following the determination that the expenditures was not appropriate.

3. The County shall make written notification of the results of the expenditure review to the citizen or other interested person who requested the review.

4. The County's decision regarding the challenge of a system development charge revenue expenditure shall be judicially reviewed only as provided in ORS 34.010 to 34.100.

EXHIBIT 1

DEPARTMENT OF GENERAL SERVICES, COLUMBIA COUNTY, OREGON

PHASE THREE DRAFT IMPLEMENTATION REPORT

Feasibility and Implementation of System Development Charges: Parks & Transportation

AUGUST 2006

FCS GROUP
Solutions-Oriented Consulting

8201 – 164th Avenue NE, Suite 300
Redmond, Washington 98052
425-867-1802

Columbia County
Transportation & Parks SDC Feasibility Study

Phase Three Executive Summary

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I. INTRODUCTION

A. Background

In July of 2003, Columbia County, Oregon (the County) engaged Financing Consulting Solutions Group, Inc. (FCS GROUP) to perform a Parks and Transportation system development charge (SDC) feasibility study. The study was to focus on the implementation of SDCs within the rural County, including all of the unincorporated County outside of the existing urban growth boundaries (UGBs).[1] Phases One and Two of this three-phase effort have been completed and delivered.

In Phase One, it was determined that rural Parks and Transportation SDCs are feasible in the County. Upon completion of Phase One, the County determined that it would be useful to include the urban growth areas (UGAs)[2] of the cities of St. Helens and Scappoose, in the hope that this would allow for the full and equitable recovery of the costs of needed infrastructure in the unincorporated County – both rural and "urban".

In Phase Two, a methodology was developed to provide a guide for calculating adequate and fair Parks and Transportation SDCs in the rural County, and in the urban growth areas of Scappoose and St. Helens.

In this Phase Three Implementation report, rural charges are calculated using information provided by the County, and charges to apply in the urban growth areas of St. Helens and Scappoose are recommended. This executive summary report marks the documentation for Phase III of the study.

B. Overview of Phase III

The study scope for Phase III is outlined below:

1. Documentation
2. Review with County Staff
3. Present to the Board of County Commissioners

C. Organization of Executive Summary

Section II of this executive summary provides a summary of the proposed methodology. Section III provides a description of the rural charge calculations and other findings. Section IV summarizes the application of charges in the urban growth areas.

II. SDC Methodology

A system development charge is a one-time charge, paid at the time of development, intended to recover the cost of the system (street or parks) capacity needed to serve that development. The charges also apply to redevelopment when that redevelopment results in increased system usage.

[1] As used in this document, the term urban growth boundary will describe the area within that boundary, including the incorporated city.

[2] As used in this document, the term urban growth area will describe the area between the urban growth boundary and the incorporated city limits.

By statute – Oregon Revised Statutes 223.297 through 223.314 – an SDC is the sum of two components:

- a reimbursement fee, designed to recover costs associated with capital improvements already constructed or under construction, and
- an improvement fee, designed to recover costs associated with capital improvements to be constructed in the future.

A. Reimbursement Fee

According to statute, the purpose of the reimbursement fee is to recover a new user's fair share of previous system costs, based on the new user's usage of existing capacity. For example, if transportation engineers estimated that a new development would use 1% of total existing system capacity, that development's transportation reimbursement fee would equal 1% of the original cost of constructing the system. Or, if the average single-family home is occupied by 2.6 people and the local parks system can serve a population of 2,600 people, the parks reimbursement fee for a single-family home would be 0.1% of the original cost of constructing the parks system.

In the case of Columbia County, there will be no reimbursement fee portion to the recommended SDCs, because the existing transportation and parks systems were funded with tax revenues. As a result, the owner of a developing property can effectively argue that they have already paid for their share of the existing transportation and parks systems through the taxes that they have paid over time. This is a reasonable conclusion, and charging a reimbursement fee to new development would essentially result in double-charging those taxpayers who choose to develop or redevelop their properties.

B. Improvement Fee

According to statute, the purpose of the improvement fee is to recover a new user's fair share of planned system costs, based on the new user's usage of the capacity those improvements will provide. In other words, the improvement fee recovers the cost of additional capacity – beyond the current level of capacity – that is needed to serve growth.

Moreover, the planned cost of additional capacity that will correct existing deficiencies – that is, capacity that is needed to serve existing user demand – may not be included in the improvement fee cost basis. Also, the improvement fee cost basis cannot include grant-funded project costs or other outside contributions. These two requirements result in new users paying for only capacity that serves them specifically and for only those costs that are borne directly by the system.

It should be noted that improvement fee proceeds may be spent only on capital improvements, or the portions thereof, which increase the capacity of the systems for which they were applied. Thus, with respect to the improvement fee, the result of the statute is that new users are charged for only as much as the cost of the capacity that is required to serve them.

C. Usage and Capacity

As already noted, system development charges are based on a new user's share of system capacity.

For transportation systems, capacity and usage is defined by vehicle trips. The Institute of Transportation Engineers (ITE) has extensively studied the number of vehicle trips generated by all of the different types of land uses – e.g., shopping centers, business offices, low-turnover restaurants, high-turnover restaurants, bowling alleys, golf courses, residential homes, mobile homes, and apartments. The ITE trip generation estimates are the standard in the transportation

industry. The Transportation SDC calculation for this study is based on P.M. peak-hour trips (P-HTs), or the number of trips generated by a given land type during the highest-volume hour in the 4 P.M. to 6 P.M. weekday traffic period. A sample of land uses and their ITE peak-hour trip estimates is shown below.

Customer Type	Peak-Hour Trips	
Single-Family Home	1.01	per dwelling
Apartments	0.62	per apartment
General Office Bldg.	1.49	per 1,000 sq. ft.
Specialty Retail	2.71	per 1,000 sq. ft.
Supermarket	6.69	per 1,000 sq. ft.
Light Industry	0.98	per 1,000 sq. ft.
Manufacturing	0.74	per 1,000 sq. ft.

For a parks system, capacity is in terms of total population and usage is defined by the occupancy rate of the land use. That is, parks systems are built to serve a certain population level, and new (residential) development is charged based on estimates of their average occupancy rates – for example, 2.6 persons per residential home and 2.1 persons per unit in a multi-family dwelling. For this study, the Parks SDC is calculated on a per-person basis, and then average occupancy rates are applied in order to determine a new development's total charge.

D. SDC Calculation

A transportation SDC is calculated in the following manner:

- following the statutory requirements summarized above, the recoverable costs for the reimbursement fee and the improvement fee are determined;
- the unused capacity, in peak-hour trips, of the existing transportation system is determined;
- the peak-hour trip capacity added as a result of planned system improvements that will serve only growth is determined;
- the reimbursement fee equals the recoverable cost of unused capacity in the existing system divided by the number of new peak-hour trips which that capacity can serve;
- the improvement fee equals the cost of capacity-increasing improvements divided by the number of new peak-hour trips that capacity can serve.

A parks SDC is calculated in the same manner, with the exception being that the usage basis is per dwelling unit rather than per peak-hour trip.

E. Credits

The law requires that credits be provided against the improvement fee, for the construction of qualified public improvements. Oregon Revised Statute 223.304 states that, at a minimum, credits be provided against the improvement fee for

> "the construction of a qualified public improvement. A 'qualified public improvement' means a capital improvement that is required as a condition of development approval, identified in the plan and list adopted pursuant to ORS 223.309 and either:
>
> (a) Not located on or contiguous to property that is the subject of development approval; or

> (b) Located in whole or in part on or contiguous to property that is the subject of development approval and required to be built larger or with greater capacity than is necessary for the particular development project to which the improvement fee is related."

The law further states that credits

> "may be granted only for the cost of that portion of such improvement that exceeds the local government's minimum standard facility size or capacity needed to serve the particular development project or property."

We recommend that the County adopt a credit policy that meets minimum legal requirements, exceeding them only in the case of granting credits in excess of the improvement fee when warranted. We believe that it is important for the County to retain as much control as possible over the prioritization and implementation of its capital plan(s) by retaining SDC revenues. These plans are created to address total system needs – not just the needs of growth. Without control over how and when those needs are addressed, the re-prioritization of projects over time can leave important County needs unmet. To avoid this outcome, credits should:

- be for the portion of the actual, estimated, or agreed-upon cost of capacity in excess of that needed to serve the particular development;
- include no cash reimbursement;
- be for planned projects only; and
- be provided only upon completion of a "qualified public improvement".

F. Indexing

Oregon law (ORS 223.304) allows for the periodic indexing of system development charges for inflation, as long as the index used is

> "(A) A relevant measurement of the average change in prices or costs over an identified time period for materials, labor, real property or a combination of the three;
>
> (B) Published by a recognized organization or agency that produces the index or data source for reasons that are independent of the system development charge methodology; and
>
> (C) Incorporated as part of the established methodology or identified and adopted in a separate ordinance, resolution or order."

We recommend that the County index its charges to the Engineering News Record (ENR) Construction Cost Index (CCI) for the City of Seattle, and adjust the charges annually as per that index. There is no comparable index for the Portland area.

III. Study Findings

As already noted, the existing transportation and parks systems have been funded solely from tax revenues. Accordingly, new development has effectively paid for their share of the existing systems and any unused capacity therein.

A. Transportation Improvement Fee

The improvement fee calculation was based on the County's Rural Transportation Plan. This plan consists of capital improvements with a current cost estimate of over $82 million, divided

among four districts within the County. With assistance from County staff, the project costs were separated by district, as shown in the following table.

	Current Project Costs by District				
	District 1	District 2	District 3	District 4	
Project Type	$27,102,121	$13,398,298	$14,999,567	$26,548,260	Total
Safety	$ 2,663,301.24	$ 280,000.00	$ 350,000.00	$ 567,372.71	$ 3,860,673.95
Landslide Movement	$ 475,000.00	$ 250,000.00	$ -	$ 250,000.00	$ 975,000.00
Bridge	$ 1,748,574.34	$ -	$ 250,000.00	$ 780,000.00	$ 2,778,574.34
Roadway	$ 17,380,837.19	$ 11,231,353.44	$ 10,815,252.72	$ 18,163,730.76	$ 57,591,174.11
Bike / Pedestrian	$ 4,250,000.00	$ 1,449,787.07	$ 3,300,000.00	$ 6,600,000.00	$ 15,599,787.07
Studies	$ 204,978.71	$ 90,000.00	$ 90,000.00	$ 90,000.00	$ 474,978.71
Mass Transit	$ 379,429.73	$ 97,157.01	$ 194,314.02	$ 97,157.01	$ 768,057.77

Based on current trip capacity and future trip capacity information supplied by the County for each project, the growth-related capital cost of each project was determined. The recoverable portion of each project cost was determined by the percentage of total future trip capacity in 2025 that will consist of trip capacity added specifically for growth – between the years 2005 and 2025. For example, if the future trip capacity for a street after improvement will be 150 peak-hour trips and the street's current trip capacity was 100 PH-Ts, 33% of the improvement's costs would be allocated to growth. The resulting costs eligible for SDC recovery are shown in the following table.

	SDC-Eligible Planned Costs by District				
	District 1	District 2	District 3	District 4	
Project Type	$9,452,768	$4,508,728	$4,952,495	$9,321,215	Total
Safety	$ 932,155.43	$ 98,000.00	$ 122,500.00	$ 198,580.45	$ 1,351,235.88
Landslide Movement	$ 83,125.00	$ 43,750.00	$ -	$ 43,750.00	$ 170,625.00
Bridge	$ 612,001.02	$ -	$ 87,500.00	$ 273,000.00	$ 972,501.02
Roadway	$ 5,943,293.02	$ 3,720,973.71	$ 3,400,338.45	$ 6,357,305.77	$ 19,421,910.94
Bike / Pedestrian	$ 1,487,500.00	$ 507,425.48	$ 1,155,000.00	$ 2,310,000.00	$ 5,459,925.48
Studies	$ 204,978.71	$ 90,000.00	$ 90,000.00	$ 90,000.00	$ 474,978.71
Mass Transit	$ 189,714.87	$ 48,578.50	$ 97,157.01	$ 48,578.50	$ 384,028.88

Finally, for each district, total SDC-eligible costs were divided by projected peak-hour trip growth from 2005 through 2025, resulting in each district's transportation improvement fee.

Improvement Fee	District 1	District 2	District 3	District 4
Capacity Expanding CIP	$ 9,452,768	$4,508,728	$4,952,495	$9,321,215
Growth to End of Planning Period				
Average Daily Trip Growth to 2025 [1]	41,597	6,408	4,675	4,661
Peak-Hour Trip Growth [2]	4,160	641	468	466
Improvement Fee				
Per Peak-Hour Trip	$ 2,272	$ 7,036	$ 10,594	$ 19,998

The County still has a number of options when implementing this transportation SDC. For example, the improvement fees in the table above are the maximum charges allowed by statute. The County may choose to adopt a lower improvement fee for each district. The following charges are recommended, by County staff, for adoption.

Location	Proposed Charge
District 1	$2,250 Per peak-hour trip
District 2	$2,250 Per peak-hour trip
District 3	$2,250 Per peak-hour trip
District 4	$2,250 Per peak-hour trip

B. Parks Improvement Fee

This study was based on the County's capital improvement plan for its parks system. This plan consists of capital improvements with a current cost estimate of $3.78 million, designed to serve the County's existing population and growth through year 2025.

Based on current required capacity and future capacity information supplied by the County for each project, the growth-related capital cost of each project was determined. The recoverable portion of each project cost was determined by the percentage of total future capacity in 2025 that will consist of capacity added specifically for growth – between the years 2005 and 2025. For example, if a project consisted of expanding a park from 3 acres to 10 acres, 70% of the project cost was allocated to growth. Such allocations resulted in a total improvement fee cost basis of $1,565,884.

Finally, total SDC-eligible capital costs were divided by projected rural County population growth between 2005 and 2025 – 394 persons. This resulted in a Parks SDC unit cost of $3,975.97 per person. The following charges would apply:

Charge Application

	Assumed Density	
Single-family dwelling unit	2.6 persons	$ 10,337.51
Multi-family dwelling unit	2.1 persons	$ 8,349.53

Again, the improvement fees in the table above are the maximum charges allowed by statute. The County may choose to adopt a lower improvement fee. The following charges are recommended, by County staff, for adoption.

Description	Proposed Charge
Single-family residential	$750 Per dwelling unit
Multi-family residential	$605.77 Per dwelling unit

IV. SDC Application in the Urban Growth Areas

During the course of this study, the County determined that it would be useful to include the urban growth areas (UGAs) of the cities of St. Helens and Scappoose. There is a strong argument for such collaboration between the County and cities: the County is responsible for providing infrastructure for growth within UGAs, however once incorporated, the cities will have to maintain and work within the infrastructure placed by the County, and, after an area is incorporated, the County can only fully recover growth-related capital costs with the assistance of cities. In the hope that collaboration between the County and cities would allow for the full and equitable recovery of the costs of needed infrastructure in the unincorporated County – both

rural and "urban" – and to also ensure that the cities agree with and support the capital infrastructure placed by the County in the UGAs.

For such collaboration, St. Helens and Scappoose seemed to be logical choices to work with, because the two cities and the County had already collaborated on a study of urban growth area needs. It is a desire of the County that a successful outcome to this study can be duplicated for the urban growth areas in the remaining cities in the County.

The County and the cities signed a memorandum of understanding, summarized below, that defines their roles and responsibilities in addressing the parks and transportation needs of the urban growth areas.

1. **Planning**. Cities are responsible for planning (in collaboration with additional service providers) in incorporated areas and in their surrounding urban growth areas. The city planning function includes identification of capital needs, costs, and other information needed to calculate SDCs in the UGAs -- without the corresponding responsibility for service provision or development permitting and, it follows, SDC collection.
2. **Service Provision**. The County is ultimately responsible for service provision in the unincorporated County – including the urban growth areas around cities. Oregon law provides for the identification and codification of service providers through the urban service agreement. It will be necessary to clarify through urban service agreements a cooperative process for the identification, scheduling, and financing of transportation and parks projects within the Urban Growth Area and who is to be responsible for constructing the planned projects.
3. **Fee Adoption, Collection and Accounting**. The fact that the County is the permitting agency for all development in the unincorporated County means that only the County can collect, and subsequently distribute SDCs to the service provider. The County agrees to validate, adopt, and collect transportation and parks SDCs calculated to apply in each UGA upon the adoption of such SDCs for transportation and parks within the Urban Growth Areas. The identified "service provider" would be the recipient of related system development charges collected on its behalf in the UGA.

In practice, the roles will interrelate in the following manner. Each city, in collaboration with the County and any other service providers in its UGA, would plan for its UGA according to the process contained in the applicable urban services agreement. The identification and prioritization of needs, projects, scheduling and associated costs identified in the plan would serve as the primary basis for the SDC to apply in the UGA.

Appendix A

Phase One Executive Summary

DEPARTMENT OF GENERAL SERVICES, COLUMBIA COUNTY, OREGON

PHASE ONE DRAFT REPORT

Feasibility and Implementation Planning of Rural System Development Charges: Parks & Transportation

NOVEMBER 2003

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Redmond, Washington 98052
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I. INTRODUCTION

A. Background

In July of 2003, Columbia County, Oregon (the County) engaged Financing Consulting Solutions Group, Inc. (FCS Group) to perform a Parks and Transportation system development charge (SDC) feasibility study. This study focuses on the implementation of SDCs within the rural County, including all of the unincorporated County outside of the existing Urban Growth Areas. The study is segregated into three distinct phases. This executive summary covers Phase I, citing the statutory authority of the County to impose SDCs and providing a policy framework for doing so.

A system development charge is a one-time fee imposed on new development or some types of re-development at the time of development to recover a fair and equitable share of the costs of existing and planned system facilities needed to serve new development. The County initially adopted Parks and Transportation system development charges in 1993. These charges were referred to a public vote and subsequently revoked. SDCs have not been re-visited since their original implementation and voter recall.

Buffering the Portland Metro area, Columbia County seems poised for increased levels of growth, similar to that experienced by Clackamas and Washington Counties. Columbia County initiated this feasibility study in an effort to require new development to fund infrastructure necessary to serve it. Such a mechanism will help ensure that the level of service enjoyed by existing constituents is not eroded with that new development.

This feasibility study and its work products are designed to provide a clear path forward for the County to again consider implementing defensible system development charges for Parks and Transportation. This process and its subsequent products are intended to be transparent to County constituents, the development community and any other interested or affected stakeholders. This executive report marks the conclusion of Phase I of the study.

B. Overview of Phase I

The study scope for Phase I was as follows:

Task 1 – Data Collection and Project Kick-Off

1.1 Collect and review data needed for the study. Provide a data needs list identifying the documents and data necessary to begin the study.

1.2 Conduct a kick-off meeting with County representatives to review the study scope, roles and responsibilities, and project timeline. Discuss remaining data needs and/or clarification, as well as policy issues/concerns.

1.3 Conduct interviews with each of the County Commissioners to gain insight into issues to be addressed during the study.

Task 2 – Feasibility Analysis

2.1 Compile the data collected in Task 1, providing guidelines to determine SDC recoverable costs, and develop a range of planning level system development charges

2.2 Conduct Oregon transportation and parks SDC comparison survey.

Task 3 – Review and Present Findings

3.1 Attend one (1) meeting with County staff to review planning level. Request input and direction from County staff in preparation of writing Phase I report.

3.2 Present findings to County Board of Commissions.

Task 4 – Documentation

4.1 Summarize Phase I study findings in an executive level report. Incorporating feedback and recommendations from County staff, this report will address such issues as:

- Appropriate allocation factors on which to recover SDC revenues;
- The feasibility of collecting a Reimbursement SDC;
- Area specific versus County-wide SDCs;
- Equity considerations; and
- Legal authority to collect SDCs.

4.2 Revise report based on County staff's feedback.

C. Organization of Executive Summary

Section II of this executive summary addresses the legal authority for the County to impose system development charges, provides an overview of the structure of an SDC, and examines the issue of proportionality in assigning costs. Section III explores area-specific versus uniform SDCs throughout the rural County. Finally, Section IV provides a comparison to other counties and communities within Oregon.

II. System Development Charges

A system development charge (SDC) is a one-time fee imposed on development at the time of development. The charge is intended to promote equity between new and existing constituents by recovering a proportionate share of the cost of system facilities that serve developing properties. The underlying premise of an SDC is to require growth to pay for all system capital costs that have been or will be incurred on their behalf to provide service capacity (i.e., require growth to pay for growth).

The equity concept of SDCs is premised on the assumption that the existing system was constructed with excess available capacity in order to provide capacity necessary to serve future development. As this growth occurs and the system's excess capacity is exhausted, it becomes necessary to expand the system and recover an equitable level of investment in the system from new customers. Absent such charges, the cost of constructing additional capacity would become the burden of all County constituents, rather than being limited to those requiring these expanded facilities. Consequently, growth would receive the benefit of availability, without having paid an equitable or proportionate share of that benefit.

A. Legal Authority

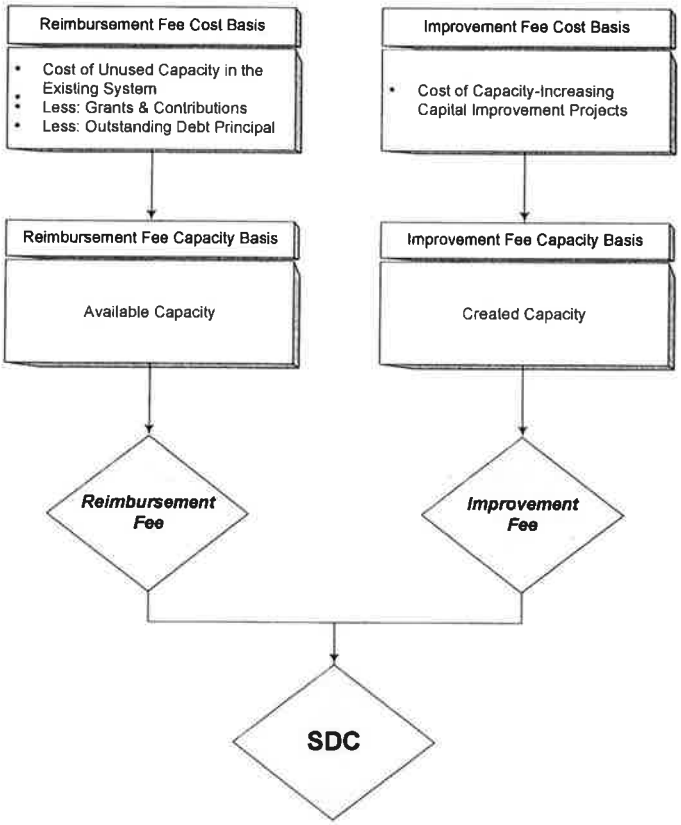
Legal authority to impose system development charges is provided in Chapter 223 of the Oregon Revised Statutes. ORS 223.297 through 223.314 provides a legal framework on which to structure these charges. As delineated in the statutes, system development charges consist of two components – a reimbursement fee and an improvement fee. The reimbursement fee is designed to recoup an equitable and proportionate share of the cost of existing assets with unused capacity available to serve growth. The improvement fee is designed to recover the cost of future capital projects that are planned to be undertaken to provide capacity to serve growth.

Limitations to both the reimbursement and improvement fee do apply. Such restrictions are discussed as we examine each component independently.

B. Overview of Methodology

Exhibit 1 presents a schematic of the overall process undertaken in the calculation of an SDC.

Exhibit 1.
System Development Charge Process



1. Reimbursement Fee

ORS 223.304 states that the reimbursement fee methodology must account for "the cost of the existing facility or facilities, prior contributions by existing users, gifts or grants from federal or state government or private persons, the value of unused capacity available to future system users." This passage has been taken to mean that contributions, gifts, and grants must be deducted from the fee basis. However, most transportation infrastructure was constructed using gas tax revenues collected by the State and remitted to the local municipalities. Most parks infrastructure was originally funded and paid for through the general fund (property taxes), *although this is no longer a County practice*. It is still difficult to argue that someone hasn't already contributed to the construction of those systems.

Along with RV registration fees, grants and timber sales revenues, the County imposes some user fees on park users. As we understand, these revenues have been used for operational costs only. The County currently has no transportation utility.

2. Improvement Fee

ORS 223.304 states that the improvement fee methodology must account for "the cost of projected capital improvements needed to increase the capacity of the systems to which the fee is related." This statute gives the County the legal authority to impose a system development charge on new development in order to recover the projected costs of future projects undertaken

to provide capacity to meet the needs of growth. In cases in which capital projects are undertaken to meet both current and future deficiencies, only the capacity-increasing project costs may be included in the improvement fee methodology.

As identified in the County's Rural Transportation System Plan, in total, the County's rural road system is adequate to handle the foreseen growth expected within the near future. Some deficiencies do exist, however, and are projected to worsen as growth occurs. As delineated by the statute, the County may impose an improvement fee to recover the proportionate cost for any project exceeding current day capacity requirements so long as the cost of meeting existing deficiencies is borne by existing residents through other funding sources.

The County's park system has an identified level of service that it is not currently meeting. The Columbia County Forest, Parks and Recreation Master Plan highlights many of these deficiencies. Similarly, as noted within the County's recent Parks tax levy proposal, current revenues are insufficient to meet current operating expenses, let alone additional capital needs. It is important to note that the County may impose a Parks system development charge to recover the costs necessary to expand the parks system to meet the needs of growth. However, the County may not require new development to meet a standard greater than that provided to existing constituents. The County will have two choices if it wishes to impose an improvement fee on new development:

- The County may invest the capital necessary to eradicate current deficiencies in order to meet its current standards;
- The County may require new development to meet only the level of service that is currently being provided to existing constituents.

C. Proportionate Share of Costs

Both the County's Rural Transportation and Parks System Plans identify existing system deficiencies and future capacity needs. Only capacity related costs, undertaken to meet the needs of growth, may be included in the SDC cost basis. Moreover, capital required to meet existing deficiencies are legally prohibited from inclusion in the SDC calculation. Including deficiency costs would require growth to pay for its share of infrastructure costs, as well as a share of those costs attributable to existing constituents. It would similarly be inappropriate and inequitable to place the entire burden for creating park and transportation system capacity on growth occurring in the rural areas of the County, simply because the infrastructure facilities are also located in the rural County.

The County's park and transportation systems serve a wide array of users. The County's park system is enjoyed by rural, urban, and out of County users. County roads are driven by a similarly broad number of users. Rural users constitute only a fraction of the total user base. It is therefore important to charge rural development only commensurate with the increased demands it places on the parks and transportation systems.

Implementation of a rural system development charge will require the County to allocate capacity-increasing improvement projects to rural areas based on proportionate shares of projected usage. This might be a difficult process if the capacity needs for rural development vary from development occurring in the urban areas of the County. The methodology recommendations for proportionately assigning costs will be addressed in the Phase II methodology report.

III. Uniform Versus Area-Specific System Development Charges

County staff has made note that during the referral of the County adopted system development charges, implemented in 1993, constituents were concerned that SDC revenues would not be spent in the same geographic area as they had been collected. There is a further issue over whether disparate capacity needs in different areas of the County would warrant creation of area-specific charges.

A. Comparison to Other Counties

The concern over proportionality, actual or perceived, has been a guiding factor for many other communities in the State of Oregon. Below, we have listed some examples of methods other communities have used to address proportionality in hope that they might provide a basis of comparison for the County to consider as it evaluates implementing rural system development charges.

Washington County Example

Washington County implemented a countywide Traffic Impact Fee (TIF) in 1990 to meet the capacity required to serve projected growth. Despite its name, Washington County's TIF is legally a tax approved by the voters. It deviates from the system development charge structure in application. However, the methodology for deriving applicable and appropriate capacity related charges is the same as a transportation SDC. The intent is also the same. At its inception, the TIF was projected to provide 25 percent of the County's annual capital funding needs.

In drafting the Traffic Impact Fee, Washington County met some resistance from the affected cities. Central to the debate surrounding the TIF was the concern that revenues would be collected in one area of the County, specifically in one city, and spent in another. To resolve the issue, a provision was added to the TIF resolution, enabling cities within the County to collect and expend TIF revenues within the limits of the city and Urban Growth Area (UGA).

All TIF revenues must be expended on projects from the County-approved projects list or on safety related projects. Further, at least 50 percent of the TIF revenues must be reserved for arterial improvements.

Clackamas County Example

Rather than implementing area-specific SDCs, Clackamas County attempted to ensure equity among new constituents by developing a capital project improvement list that proportionately targets capacity needs throughout the County. ORS 223.309 requires that a governmental body imposing SDCs must "prepare a capital improvement plan, public facilities plan, master plan or comparable plan that includes a list of the capital improvements that may be funded with improvement fee revenues and the estimated cost and timing for each improvement" prior to adopting the SDC. This improvement list becomes part of the public record and provides a clear plan for addressing capacity needs throughout the County's jurisdiction.

Using a project list to achieve proportionality offers several advantages over implementing area-specific collection and expenditure requirements. Primarily, absent jurisdictional restrictions, the County is better able to fund high priority capacity projects first and as needed, rather than delaying until such time that SDC revenues are sufficient to fund the improvement portion of the project. Additionally, SDC revenues are expended on a timelier basis, providing ongoing and substantial benefits from the program, although there are no statutory restrictions on the timing of expenditures.

Yamhill County Example

Yamhill County does not currently impose transportation system development charges on new development. Adopted in 1998, the County Commissioners repealed its transportation SDC under political pressure. However, the SDC originally adopted can serve as a useful benchmark for Columbia County.

Yamhill County adopted three separate transportation SDCs. The County imposed a rural SDC on all growth occurring outside city boundaries. As is often the case, the level of service for county roads is often lower than those within city boundaries. In anticipation of city annexation, Yamhill County also imposed two separate transportation SDCs within the Urban Growth Boundaries of the cities of Newberg and of McMinnville. All three were treated as distinct areas, one to serve rural growth, and two to serve growth occurring within the Urban Growth Boundaries. Currently in Columbia County, the City of St. Helens does not impose SDCs within the unincorporated areas of its urban growth boundary. The 2001 "Interim Development Standards and Strategies Final Report", prepared for the County, recommended that SDCs be imposed within the unincorporated portion of the St. Helen's UGB, applying the City's existing SDC methodology. Although both the County and the City approved the Plan, it was not implemented due to concerns raised (about water SDCs) by a water association located in part of the UGB.

North Clackamas Recreation and Parks District

The North Clackamas Recreation and Parks District provides park service to urban Clackamas County. The District has had a Parks SDC in place for several years and is currently updating the charge, incorporating present day costs and level of service standards. The District's methodology treats all constituents, regardless of location, as equal users and beneficiaries of the parks system. This assumes that people will travel outside of their immediate living area in order to use park facilities. It also recognizes that it is difficult to segregate facility usage by residential location. Consequently, the District imposes a uniform SDC to all new development occurring within its service boundaries.

B. Recommendations

Transportation System Development Charges

Based on the information summarized in preceding sections, and on the input of the County Board of Commissioners, we recommend that a uniform Transportation system development charge be implemented throughout the rural County (outside identified city UGBs). We further recommend that the transportation SDCs collected in County sub-areas be tracked and expended in those areas. It has been suggested that those areas could match existing road district boundaries. As Washington County has done, Columbia County may retain oversight by defining expenditure criteria, as well as by creating the rural transportation project list.

Capacity related capital needs vary throughout the County, and will necessarily deviate among the different parts of the County. While this fact provides a reasonable rationale for constructing area-specific (non-uniform) charges, the County objective of limiting the transfer of funds from one part of the County to another could also be met by spending SDCs in the area in which they were collected. Road system users would be considered equal beneficiaries of capacity improvements projects within the County, regardless of location, and therefore would bear an equal burden of the capital costs.

Parks System Development Charges

Based on the information summarized in the preceding sections, and on the input of the County Board of Commissioners, we also recommend that a uniform Parks system development charge be implemented throughout the rural County. Park SDC revenues would be collected by the County and expended on the highest priority capacity needs. As asserted by the North Clackamas Parks and Recreation District, park usage does not have an absolute correlation to location. Rather, parks on one side of the County are frequently visited and enjoyed by residents from the other side of the County.

IV. System Development Charge Comparison Survey

Below, we have provided a comparison survey benchmarking the relative SDC level for other communities throughout the State of Oregon. We feel it is important to note that no two transportation or park systems are alike. Each community has its own unique system, invested costs, needs and planning standards. Consequently, this survey serves merely to demonstrate a relative level of investment required to serve growth and imposed as a condition of development.

The chart below list several counties and park districts. The term "N/A" is used to illustrate that a jurisdiction does not have responsibility for either that transportation or parks system. The phrase "No SDC" indicates that the jurisdiction is responsible for that particular service, but does not currently charge a system development charge.

Exhibit 2.
County / District System Development Charge Comparison Survey

Jurisdiction	Transportation SDC	Parks SDC
Benton County	No SDC	No SDC
Clackamas County	$2,938	N/A
Clackamas County/Happy Valley[1]	$4,558	N/A
Clatsop County[2]	No SDC	No SDC
Jackson County[3]	$1,700	$837
Lane County	No SDC	$425
Marion County	$1,550	$207
Multnomah County	No SDC	N/A
North Clackamas Parks & Recreation District[4]	N/A	$930
Tualatin Hills Parks & Recreation District	N/A	$2,399
Washington County[5]	$2,530	
Yamhill County[6]	*$1,569*	

** SDC rates are based on one Single Family Residence

(1) Joint SDC between Happy Valley and Clackamas County

(2) Road capital needs are met using Road District Tax revenues.

(3) Jackson County transportation SDC is rounded

(4) North Clackamas Parks & Recreaction District is in the process of updating their SDC.

(5) Washington County collects a Traffic Impact Fee. The methodology is the same as an SDC.

(6) Yamhill County implemented a transportation SDC in 1998. The County Commissioners revoked the charge after a year.

A number of cities within the County charge transportation and / or parks SDCs. These charges are listed below for comparative purposes.

Exhibit 3.
City System Development Charge Comparison Survey

Jurisdiction	Transportation SDC	Parks SDC
Clatskanie	No SDC	No SDC
Columbia City	$ 3,466	$ 1,134
Rainier	No SDC	No SDC
Scappoose	$ 347	$ 1,496
St. Helens	$ 3,084	$ 814
Vernonia	$ 643	$ 749

** SDC rates are based on one Single Family Residence

The County has requested that we provide a range of annual revenues that could potentially be recovered for capacity investment in the parks and transportation systems if the County were to adopt system development charges. This question becomes important as the County moves forward with this study. If revenues are inadequate to cover the administrative burden for imposing the charges, and a substantial portion of planned capital costs, then the County might wish to terminate the exploratory process.

We believe it is important to note, that, as permitted by the Oregon statutes, the annual cost of administering system development charges may be included within the SDC cost basis, thus recovering the full cost for time spent. Perhaps more importantly, by not adopting SDCs, the County would be missing an opportunity to ensure that new development pays for the costs required to provide it service. In the short term, absent SDCs, all constituents would experience a decreased level of service due to under-capacity. In the long term, the cost of providing services to growth areas would be spread over the County's whole constituent base, creating a de facto subsidy for new development at the expense of existing residents. This is of course a policy matter of concern for the County.

In Phase I of this feasibility study, no system development charges have been generated. Applying a general growth estimate to the highest, lowest and median system development charges from the county comparison study, the County might gain a sense of the annual revenues recovered to fund capacity expansion projects. Assuming one hundred new residences per year, the range of revenue recovery would be as follows:

Exhibit 4.
System Development Charge Revenue Recovery

Survey of Charges[1]	Transportation SDC	Parks SDC
High	$4,558	$2,399
Median	$2,115	$837
Low	$1,550	$207
Assumed Annual Growth in Equivalent Residential Units[2]	100	100
Annually Recovered Revenue[3]	**Transportation**	**Parks**
High	$ 455,800	$ 239,900
Median	211,500	83,700
Low	155,000	20,700

(1) Represents the High, Median and Low Single Family SDC from the survey provided above
(2) Estimate based on 120 units in FY 2001/2002 and 97 units in FY 2002/2003
(3) High, Median and Low SDC multiplied by the assumed number of ERUs

Both the June 1998 Rural Transportation System Plan and the April 1997 Forests, Parks and Recreation Master Plan call out specific capital needs. Although, these lists have not been recently updated, they provide an order-of-magnitude look at transportation and parks capital needs throughout the County. These capital costs have been escalated to 2003 levels using 3.5% annual inflation.

Exhibit 5.
Total Identified Rural Transportation Capital Needs

	1998	2003
Short Term Projects	$ 14,191,000	$ 16,854,000
Intermediate Term Projects	5,085,000	6,039,000
Long Term Projects	23,760,000	28,219,000
Total Improvement Projects	$ 43,036,000	$ 51,112,000

** Assumes compounded inflation of 3.5% annually

Exhibit 6.
Identified Short-Term Parks Capital Needs

	1997	2003
Short-Term Capital Projects	$ 2,045,253	$ 2,513,000

** Assumes compounded inflation of 3.5% annually

The identified capital projects include both rehabilitative and capacity-increasing improvement projects. Improvement fees are designed to provide a funding source for capacity-related improvement projects only. Rehabilitative project costs must be met by the County and the existing constituent base with the supplementary use of reimbursement fees, as applicable.

Appendix B

Phase Two Executive Summary

DEPARTMENT OF GENERAL SERVICES, COLUMBIA COUNTY, OREGON

PHASE TWO DRAFT METHODOLOGY REPORT

Feasibility and Implementation Planning of Rural System Development Charges: Parks & Transportation

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I. INTRODUCTION

A. Background

In July of 2003, Columbia County, Oregon (the County) engaged Financing Consulting Solutions Group, Inc. (FCS Group) to perform a Parks and Transportation system development charge (SDC) feasibility study. The study was to focus on the implementation of SDCs within the rural County, including all of the unincorporated County outside of the existing urban growth boundaries (UGBs).[1] Phase One, which determined that rural Parks and Transportation SDCs are feasible in the County, of this three-phase effort has been completed and delivered.

Upon completion of Phase One, the County determined that it would be useful to include the urban growth areas (UGAs)[2] of the cities of St. Helens and Scappoose, in the hope that this would allow for the full and equitable recovery of the costs of needed infrastructure in the unincorporated County – both rural and "urban". St. Helens and Scappoose seemed to be logical choices to work with, because the two cities and the County had already collaborated on a study of urban growth area needs. It is a desire of the County that a successful outcome to this study can be duplicated for the urban growth areas in the remaining cities in the County.

This methodology report is designed to provide a guide for calculating adequate and fair Parks and Transportation SDCs in the rural County, and in the urban growth areas of Scappoose and St. Helens. This executive summary report marks the documentation for Phase II of the study.

B. Overview of Phase II

The study scope for Phase II was as follows:

Task 1 – Work Sessions with Participants (County, St. Helens, and Scappoose)

1.1 Prepare for and meet with participants in working group sessions to discuss issues to be addressed prior to establishing the SDC methodology. One (1) meeting will be held with all participants and one (1) meeting will be held individually with St. Helens and Scappoose. Discussion points could include the following:

- Jurisdictional structure for implementation of joint County/Cities' SDCs applicable in unincorporated UGB areas (e.g. single provider, regional provider, cooperative providers). FCS Group will discuss precedents (e.g., Happy Valley).
- Cities' existing SDC methodologies and applicability for joint or rural SDCs.
- Roles/responsibilities of participating jurisdictions. (e.g. how fees would be collected and revenues spent).
- Requirements for master plan updates/modifications to address joint SDCs.
- Required agreements for joint SDC program.

1.2 Prepare meeting summaries for distribution to all participants.

1.3 Draft a memorandum of understanding (MOU) for establishing joint SDCs for use in developing the SDC methodology report. The methodology established in the report

[1] As used in this document, the term urban growth boundary will describe the area within that boundary, including the incorporated city.

[2] As used in this document, the term urban growth area will describe the area between the urban growth boundary and the incorporated city limits.

(Task 2) will then become an exhibit in the final joint SDC agreements. The County will be responsible for crafting the joint SDC agreements and obtaining appropriate signatures.

1.4 Prepare for and attend one (1) meeting with all participants to review the MOU. At this point, participants will be committing to the process, or guiding principles of establishing joint SDCs. Specific methodology (Task 2) and SDC results (Phase III - Implementation) will be determined later.

Task 2 – Prepare Methodology Report

2.1 Prepare draft methodology report. This report will summarize the following:

- Identification of roles/responsibilities of participating jurisdictions.
  - Agreements
  - Collection and transfer of revenues
  - Expenditures of SDC revenues
- Description of refinements to Cities' current SDC methodology(ies) for applicability in the UGA.
- Calculation methodology for joint County/Cities' SDCs applicable in the unincorporated UGB areas.
- Calculation methodology for rural SDCs.
- Calculation and applicability of credits.
- Identification of data needed to calculate the SDCs. This will include but not be limited to the following:
  - Transportation System Plan and Parks Master Plan
  - Capital Improvement Plans (CIP), with growth-related projects identified
  - Growth assumptions (in rural County, cities, and UGAs)

2.2 Update methodology report as appropriate based on feedback from participating jurisdictions, County staff, the Board of Commissioners and legal reviews. Deliver final report.

2.3 Coordinate legal review of methodology with County/Cities' attorneys.

Task 3 – Review with County Staff/Participating Cities

3.1 Review Phase I product, as necessary, and finalize Phase II schedule and scope in an on-site meeting with County staff.

3.2 Review methodology report with participating Cities and County staff in up to three (3) on-site meetings. Record comments and concerns for incorporation into the methodology report where appropriate.

Task 4 – Presentation to Public Stakeholders

4.1 Prepare for and present methodology and recommendations in a public forum to all interested stakeholders. This forum will provide a vehicle to present the County's objectives and educate the public on the equity issues of ensuring growth pays for facilities constructed to serve new development.

Task 5 – Present to the Board of County Commissioners

5.1 Prepare for and present methodology report in up to two (2) work sessions with the Board of Commissioners and/or joint with participating Cities. Record comments and concerns for incorporation into the final methodology report where appropriate.

C. Organization of Executive Summary

Section II of this executive summary identifies the proposed roles and responsibilities of the participating jurisdictions. Section III provides a calculation methodology for both the rural and urban areas. Section IV identifies the data needed to appropriately calculate the charges as proposed in Section III. Finally, Section V provides a conclusion.

II. Participant Roles and Responsibilities

The definition of participant roles and responsibilities is especially important for three major functions: planning, providing service, and permitting. The planning function is relatively straightforward, if not in the statute, then certainly in practice. The County plans for the "rural" County – the unincorporated area outside of both cities and urban growth boundaries. Cities are responsible for planning (in collaboration with additional service providers) in incorporated areas and in their surrounding urban growth areas.

The issue of service provision is perhaps more complicated. The County is ultimately responsible for service provision in all of the unincorporated County – including the urban growth areas around cities. Upon annexation of urban growth areas, however, the responsibility for infrastructure is often, but not automatically, transferred. At times, County parks and roads remain County property, even though they are located within City boundaries. This may take place for a number of reasons, but usually it is because either (1) the County facility does not meet City standards for condition or (2) the County facility remains highly desirable to the County (e.g., a destination park). Oregon law provides for the identification and codification of service providers through the urban service agreement.

The issue of service provision can be complicated further by the presence of third party service providers, such as park and recreation districts. Both Scappoose and St. Helens are further served by park and recreation districts, though, to the knowledge of the cities, neither district has an adopted facilities plan in place. District input will be important in determining a final SDC methodology.

Another key role is that of the permitting agency. The fact that the County is the permitting agency for all development in the unincorporated County means that only the County can collect, and subsequently distribute SDCs to the service provider. Collaboration is essential if the service provider is to recover eligible infrastructure costs in the UGA.

So, the city planning function includes identification of capital needs, costs, and other information needed to calculate SDCs in the UGAs -- without the corresponding responsibility for service provision or development permitting and, it follows, SDC collection. It will be necessary to clarify through urban service agreements who is to be responsible for constructing needed UGA capital facilities, as identified in the city-developed plans. This identified "service provider" would be the recipient of related system development charges collected on its behalf in the UGA.

In practice, the roles could interrelate in the following manner. A city, in collaboration with the County and any other service providers in its UGB, would plan for its UGB – as it does now. The needs and associated costs identified in the plan would serve as the primary basis for the

SDC to apply in its surrounding UGA. The County would agree to collect the SDC in the UGA upon permitting, banking the proceeds in an account designated for infrastructure needs in that UGA. The party later responsible for construction of the planned infrastructure, likely the city, would request access to that County account for the eligible (growth-related) portion of the project cost. It is likely that the designation of available funding would be made on a project-specific basis to ensure appropriate expenditure of available funds.

II. Proposed Calculation Methodology

A system development charge (SDC) is a one-time fee imposed on development at the time of development. The charge is intended to promote equity between new and existing constituents by recovering a proportionate share of the cost of system facilities that serve developing properties. The underlying premise of an SDC is to require growth to pay an equitable share of the system capital costs that have been or will be incurred on their behalf to provide service capacity (i.e., require growth to pay for growth).

A. Basic Calculation Framework

Legal authority to impose system development charges is provided in Chapter 223 of the Oregon Revised Statutes. ORS 223.297 through 223.314 provides a legal framework on which to structure these charges. As delineated in the statutes, system development charges consist of two components – a reimbursement fee and an improvement fee. The reimbursement fee is designed to recoup an equitable and proportionate share of the cost of existing assets with unused capacity available to serve growth. The improvement fee is designed to recover the cost of future capital projects that are planned to be undertaken to provide capacity to serve growth.

1. Reimbursement Fee

ORS 223.304 states that the reimbursement fee methodology must account for "the cost of the existing facility or facilities, prior contributions by existing users, gifts or grants from federal or state government or private persons, the value of unused capacity available to future system users." This passage has been taken to mean that contributions, gifts, and grants must be deducted from the fee basis. In addition, most transportation infrastructure was constructed using gas tax revenues collected by the State and remitted to the local municipalities. Most parks infrastructure was originally funded and paid for through the general fund (property taxes). It is therefore difficult to argue that someone hasn't already contributed to the construction of those systems.

Both the cities of Scappoose and St. Helens have both transportation and parks SDCs, These city charges are predominately made up of improvement fees. In fact, the St. Helens parks SDC is the only one that features a reimbursement fee, due in large part to the City's abundance of parks. The County does not currently have transportation or parks SDCs. It is likely that rural County SDCs will feature only an improvement fee, for the reasons cited above.

2. Improvement Fee

ORS 223.304 states that the improvement fee methodology must account for "the cost of projected capital improvements needed to increase the capacity of the systems to which the fee is related." This statute gives the County the legal authority to impose a system development charge on new development in order to recover the projected costs of future projects undertaken to provide capacity to meet the needs of growth.

When capital projects are planned to both meet deficiencies and add capacity for growth, only the capacity-increasing project costs may be included in the improvement fee methodology. This is an important distinction, because it means that deficiencies against target service levels are not includable in the improvement fee basis. So, if a component of the system is not meeting service level standards, and a planned project will bring that component up to existing standards and provide capacity for growth at that higher (target) standard, then a community faces two choices with regard to the improvement fee. That community may either (1) include only the cost of growth-related capacity essential to maintain the existing (lower) service level or (2) utilize another (non-improvement fee) funding source to recover the cost of erasing the existing deficiency and include the cost of growth-related capacity essential to maintain the target (higher) service level.

3. Calculation Framework

In its simplest terms, the calculation of either fee is very straightforward: it is the eligible cost of system capacity for growth divided by the growth that it will serve. For the reimbursement fee, the *eligible* cost of capacity for growth is the cost, after the considerations noted above, of unused, available, capacity in the existing system. For the improvement fee, the cost of capacity for growth is planned system capacity that will be added to serve growth.

In either case, the growth to be served, the denominator in the calculation, is expressed in the units that will form the basis of charging. For example, if the parks SDC is to be recovered on a per dwelling unit basis, then the growth to be served by system capacity would be expressed in dwelling units.

Reimbursement Fee		Improvement Fee		SDC
Cost of Unused Capacity in Existing System / Capacity to be Served	+	Cost of Planned System Capacity to Serve Growth / Capacity to be Served	=	Sum of Reimbursement and Improvement Fees

B. Consistency of Existing Charges

The cities of Scappoose and St. Helens use similar bases for their existing charges. For transportation, charges are based on average daily trip estimates, as determined by land use and accompanying trip generation estimates found in the Institute of Traffic Engineers (ITE) Trip Generation Manual. For parks, both cities charge on a per dwelling unit basis. Appropriately, given that existing plans do not link needed parks facilities to commercial development, neither city charges a parks SDC for nonresidential development.

C. Charge Methodology in the Urban Growth Areas

The differences between the amount and type of existing system facilities, type of existing and expected development, and the amount and type of needed facilities are significant among the cities, the urban growth areas, and the rural County. While the Phase I feasibility report concludes that single charge, not a charge varying by geographic area, in the rural County would be desirable, this approach would likely not be equitable between urban areas, including cities and surrounding urban growth areas, and the rural County.

It is therefore recommended that the charge methodologies be consistent, but that they be applied separately to the rural County and the cities / urban growth areas – based on the distinct needs, and existing and expected development (growth) in those areas. As a fallback course of action, it would perhaps be even more equitable to distinguish between city and UGA charges, so that charges for cities, UGAs, and the rural County would all be different. Existing city planning documents better fit the first approach, because they don't distinguish between city and UGA growth and capital needs.

D. Charge Methodology in the Rural County

As stated in the Phase I report, we recommend that uniform transportation and parks system development charges be implemented throughout the rural County (outside identified city UGBs). We further recommend that the transportation SDCs collected in County sub-areas be tracked and expended in those areas. It has been suggested that those areas could match existing road district boundaries. As Washington County has done, Columbia County may retain oversight by defining expenditure criteria, and by creating the rural transportation project list.

Capacity related capital needs vary throughout the County, and will necessarily deviate among the different parts of the County. While this fact provides a reasonable rationale for constructing area-specific (non-uniform) charges, the County objective of limiting the transfer of funds from one part of the County to another could also be met by spending SDCs in the area in which they were collected. The combined effect of implementing a uniform charge and restricting the transfer of charge proceeds to other areas within the rural County poses an interesting challenge. In fact, this approach creates an impediment to full cost recovery.

As an example, let's assume that the uniform transportation SDC is $100 per average daily trip (about $1,000 per single family residence) and is calculated to recover the cost of system capacity in entire rural County. We will further assume that the area-specific SDC in Area A (within the County) would be $150 per ADT. We will further assume that it would be only $50 per ADT in Area B. If SDC proceeds are distributed to each area as they are collected, then Area A will receive $100 per ADT in fee revenue when it needs $150, and Area B will receive $100 per ADT in fee revenue when it needs only $50. Area A will be under funded and Area B will be over funded. This creates a potential legal issue by severing the link between the amount of the fee and the cost of service. [The strength of that linkage, or nexus, largely determines the validity of the fee as a fee and not a tax.]

If SDC proceeds are instead distributed by need, and are not restricted to where they were collected, then direct subsidies will result among areas – a practice that led to the recall of the County's last rural SDCs. In the previous example, Area A would receive $150 in fee revenue when it paid only $100, and Area B would receive only $50 in fee revenue when it paid $100. Area B would be subsidizing Area A.

One way to address the subsidization and revenue distribution issues created by the uniform SDC approach would be to establish the uniform SDC at the level of the lowest area-specific SDC. In the previous example, Area B's charge of $50 would be the uniform SDC. Area B would have its needs met, but the SDC would only partially meet the needs of all other areas. The County could further designate a subset of projects (e.g., arterial routes of Countywide benefit) that would be of Countywide benefit to also include in the uniform charge basis.

Parks SDCs could be approached similarly. Or, in contrast, park SDC revenues could be collected by the County and expended on the highest priority capacity needs. As asserted by the North Clackamas Parks and Recreation District, park usage does not have an absolute correlation to location. Rather, rural parks are accessible to and used by all county residents regardless of proximity or sub-area.

E. Calculation and Applicability of Credits

ORS Section 223.304 paragraph 3 states, *"the ordinance or resolution that establishes or modifies an improvement fee shall also provide for a credit against such fee for the construction of a qualified public improvement. A "qualified public improvement" means a capital improvement that is required as a condition of development approval, identified in the plan adopted pursuant to ORS 223.309 and either:*

(a) Not located on or contiguous to property that is the subject of development approval; or

(b) Located in whole or in part on or contiguous to property that is the subject of development approval and required to be built larger or with greater capacity than is necessary for the particular development project to which the improvement fee is related."

Paragraph 4 of this same section further states that the credit *"shall be only for the improvement fee charged for the type of improvement being constructed, and credit for qualified public improvements under subsection (3)(b) of this section may be granted only for the cost of that portion of such improvement that exceeds the government units minimum standard facility size or capacity needed to serve the particular development project or property".*

The terms and conditions under which an SDC credit is to be granted are well defined in the ORS. There are alternative conceptual bases for determining credit levels in the future.

These would all include the following elements:

- Determine qualifications of a project either as
  - "off site", or;
  - "on-site" and providing capacity in excess of that needed by the development.
- Determine a cost or cost share eligible for credits
- Establish rules for issuance and use of credits including transferability, rate of redemption, and expiration.

Credits for development make sense as they encourage private enterprise to solve, on a prospective basis, community needs. However, by constructing projects for reimbursement or credit, the developer is imposing a construction schedule on the City, perhaps in conflict with the City's established priorities. Due to the credit practices, SDC funds will not accrue as expected and the schedule of the CIP may be inverted or shuffled. This may be acceptable in some cases however it may not be acceptable in others.

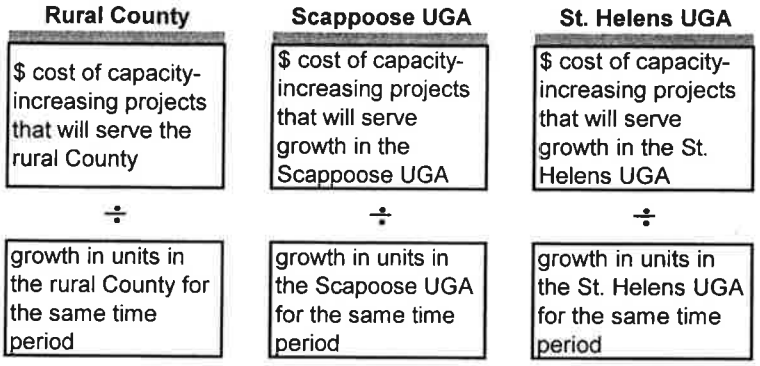
The County (and participating cities) faces the following choice: to either grant full credit or reimbursement, potentially in excess of the legal minimum and acknowledge that this will lead to occasional re-ordering of CIP projects *or* to constrain the credit policy to the legal minimum.

We recommend that the County adopt a credit policy to meet minimum legal requirements. The fee should:

1. be against the improvement fee only;
2. be for the portion of the cost that exceeds facility or capacity needed to serve the particular development;
3. include no cash reimbursement.

F. Data Requirements

The following basic information is needed in order to calculate parks and transportation SDCs (improvement fees only) for the County rural area, and the unincorporated County within the urban growth boundaries of the cities of St. Helens and Scappoose.



Some of this information is readily available in existing planning documents, but much of it will need to be derived from the plans, or newly developed.

A summary of the contents of key documents and remaining needs for each jurisdiction is provided below.

Columbia County

1998 Rural Transportation System Plan. The Rural TSP identifies $43,036,000 in needed improvements to meet existing demand and growth in average daily trips of 57,341 over twenty years (through 2017). While the expected growth and associated needs vary among areas of the County, it is estimated in the plan that 40.71% of the list of eligible projects (40.71% of $28,783,000, or $11,717,700) is capacity-increasing to meet the needs of growth.

It is further indicated in the Plan that the list of improvements will generally sustain the existing, and acceptable, service level for County roads. The County will need to validate that the SDC-eligible portions of project costs identified in the Plan do not include correcting any existing service level deficiencies. Also, the project list includes projects that may have been completed. Those projects should be removed, and the costs themselves should be updated to 2004-2005 estimates in order to ensure full cost recovery.

1997 Columbia County Forests, Parks and Recreation Master Plan. As of the writing of the Plan, the County owned "sixteen (16) parks, encompassing approximately 750 acres; 310 acres of forests lands; and six (6) boat dock facilities." These parks and their appurtenances are inventoried in the Plan. Several of the parks are as yet undeveloped. Estimated facilities needs, including appurtenances and acreage, are included to meet existing (1990) needs and to serve growth from 1990 to 2000. The Plan details current and future needs for both developed and undeveloped parks, however, the cost information is incomplete.

The information in the Parks Plan will need to be updated to isolate the estimated cost of facilities, trails, and land acquisition needed to serve growth in the rural County, again without increasing the level of service provided to the existing population. The cost information that is included in the Plan is incomplete, particularly in the area of future costs, which would likely be includable in the SDC. Corresponding estimates of the growth in population to be served by the updated project list will also be needed.

City of Scappoose

1997 Scappoose Transportation System Plan. The Scappoose TSP identifies $34,289,400 in needed transportation improvements. Of that total, $2,383,300 is identified as the cost of short-term projects, $7,145,600 is identified as the cost of intermediate-term projects, and $24,760,500 is identified as the cost of long-term projects. Appendix E of the Plan estimates that capacity-increasing project costs total $19.3 million. The project list is projected to serve growth in system-wide peak-hour trips of 2,870 vehicular trips (32,895 average daily trips according to Appendix E) – from the 1995 estimate of 3,620 to the 2015 estimate of 6,490. Of the 1995 estimate, 1,020 are estimated to be pass-through trips, 1,900 are estimated to have an origin or destination within the study area, and 700 are estimated to have both an origin and destination within the study area. Of the 2015 forecast, 1,340 are estimated to be pass-through trips, 3,930 are estimated to have an origin or destination within the study area, and 1,220 are estimated to have both an origin and destination within the study area. [Note: there is no convenient mechanism to equitably recover the cost of pass-through trips from those who generate them.]

2002 Scappoose Rail Corridor Study. The Rail Corridor Study identifies $17.19 million of transportation capital improvements intended to improve east-west roadway connections across the Portland & Western Railroad corridor. A number of these projects supersede or amend projects contained in the TSP, so a revised project list, that removed any duplication, would be needed to support defensible SDCs. Projects on this list that come from the Rail Corridor Study will further require an allocation to determine the portion of each that is capacity-increasing to meet the needs of growth and therefore SDC-eligible.

In estimating project costs and growth, neither the TSP nor the Rail Corridor Study distinguishes between that to occur within existing City limits and within the urban growth area. Such distinctions will be necessary in order to calculate separate charges for the urban growth areas. Also, the updated project list will need to include updated project costs. Trip growth estimates will need to be updated as well, so that the internal consistency between the project list and the growth it will serve is preserved.

1997 City of Scappoose Parks and Recreation Capital Facilities Plan and System Development Charges Methodology Report. The Parks CFC / SDC Plan inventories existing parks facilities and identifies $11,288,700 of needed facilities, of which $7,864,226 is identified as growth-related, and therefore, SDC-eligible. Population growth estimates are also included, forecasting population growth to 9,821 in 2016, an increase of 5,691 from the 1996 population of 4,130. This report supports a parks SDC of $1,539 per single family residential dwelling unit. The information in the Plan will need to be updated to calculate a new charge, one that also distinguishes the existing City and the UGA.

City of St. Helens

1997 Transportation System Master Plan. The TSP identifies $29,231,000 in needed transportation improvements to serve the existing population plus growth. The 2001 System Development Charge Study identifies a total of $12.6 million (in 1997 dollars) in capacity-increasing project costs. The TSP does not provide system-wide trip growth estimates. These estimates are derived, in the SDC study, from average daily trip mile projections provided in the TSP. It is estimated from this information that average daily trips will grow from a 1997 total of 30,526 to 52,562 by the end of the study period – buildout. Cost and trip estimates will need to be updated, with a distinction added between City and UGA needs and growth.

1999 St. Helens Parks Master Plan. The Parks Plan includes an inventory of the City's existing parks that includes some planned improvements to those parks. It affirms the City's parks planning standards of seven acres of parks for every 1,000 residents, and a park within one-half mile of all residences within residential zones. The Plan also includes a section on future needs that indicates that the City meets its standards in some parts of the City and does not

meet its standards (for proximity) in others. The 2001 System Development Charge Study, and information on additional specific parks,[3] essentially supersedes the SDC-related information in the Parks Plan. In that study, additional needed parks are identified and their costs estimated. The capacity-increasing, growth-related, portions of those projects are isolated. The resulting list totals $5,301,000 (2000 dollars), of which $2,222,905 is identified as capacity increasing, and therefore SDC-eligible, to meet the needs of growth to the projected buildout population of 15,600, a growth of 6,000 people from the 2000 population of 9,600.

There is no discussion in the SDC study and little discussion in the Parks Plan on the needs of the UGA. The following language appears in the Plan:

> "Within the Urban Growth Boundary the City has ample park acreage, but we do not fully comply with the desire to have park land within one-half mile of all residences. There are about 23 parcels of land in the residential sections of the Urban Growth Area that are over 8 acres in size. Ten of these parcels are vacant. Only a couple are in the southwest portion of the UGA."

In order to calculate parks SDCs for the UGA, those UGA needs will need to be identified and their costs estimated – distinguishing from improvements needed to meet standards and improvements needed to meet growth needs. Likewise, population estimates will be needed for inside the existing City and the UGA.

IV. Conclusion

Using the unadjusted, dated information from the plans, sample charges can be calculated for comparative purposes. These sample charges, calculated without distinguishing between inside-city and the UGA, are provided below.

[3] The following parks are not included in either the Parks Plan or the SDC study: Dahlgren Park (in UGA), Dalton Park (in City), Walnut Tree Park (in City), and Asbury Park (County owned park in UGA).

Sample Transportation SDCs

Rural County	Scappoose UGA	St. Helens UGA
$11,717,700 in growth-related, capacity-increasing projects	$19,300,000 in growth-related, capacity-incresing projects [1]	$12,600,000 in growth-related, capacity-increasing projects [2]
÷	÷	÷
57,341 growth in average daily trips (ADTs) for the same period	32,895 growth in ADTs for the same period [2]	22,036 growth in ADTs for the same period [2]
=	=	=
$ 204.35 per ADT, or $ 1,955.64 per household [3]	$ 586.72 per ADT, or $ 5,614.87 per household [3]	$ 571.79 per ADT, or $ 5,472.05 per household [3]

NOTES:
[1] Includes area within UGB: City and UGA. Does not include Rail Corridor Study.
[2] Includes area within UGB: City and UGA.
[3] Does not include any adjustments for other considerations such as fund balance.

Sample Parks SDCs

Rural County	Scappoose UGA	St. Helens UGA
Information incomplete	$7,864,226 in growth-related, capacity-incresing projects [1]	$2,222,905 in growth-related, capacity-increasing projects [1]
÷	÷	÷
Information incomplete	5,691 growth in population for the same period [1]	6,000 growth in population for the same period [1]
=	=	=
Information incomplete	$ 1,381.87 per resident, or $ 1,539.00 per household [2]	$ 370.48 per resident, or $ 963.26 per household [2]

NOTES:
[1] Includes area within UGB: City and UGA.
[2] Does not include any adjustments for other considerations such as fund balance.

As stated previously, all information / data inputs, including project lists, existing demand, and growth estimates, should be updated to reflect current conditions and projections. This does not necessarily mean that new plans are required, although that would be advisable if conditions and/or needs have changed significantly since publication. It may be possible to craft defensible SDCs using updated information from the existing plans. This updated information could in most cases be used to calculate UGB charges that don't distinguish between each city and its UGA. In any case, applicable (UGA) charges would be collected by the County upon permitting, and remitted to the service provider – agreed to be the city in most cases. To the extent that eligible County facilities are planned in UGAs, those capacity-increasing costs can be included in the rural SDC basis.

Appendix C

Memorandum of Understanding

EXHIBIT A

Transportation and Parks System Development Charges Memorandum of Understanding

This Memorandum of Understanding (MOU) among Columbia County, the City of Scappoose, and the City of St. Helens identifies that it is to the benefit of all three agencies to work collaboratively to ensure that transportation and parks facilities are funded and available to serve existing and future residents of the cities' urban growth areas (UGAs).

WHEREAS good transportation and parks systems are essential to the health and well being of a community; and

WHEREAS cities are responsible for planning transportation and parks services in areas outside of city boundaries and inside city urban growth boundaries, known as urban growth areas; and

WHEREAS transportation and parks system development charges (SDCs), an instrument used to fund capital improvements, are not currently applied in urban growth areas in Columbia County;

THEREFORE, Columbia County, the City of Scappoose, and the City of St. Helens enter into this Memorandum of Understanding to collaboratively develop and implement transportation and parks system development charges to apply in the cities' urban growth areas as follows:

1. Planning. Cities are responsible for planning (in collaboration with additional service providers) in incorporated areas and in their surrounding urban growth areas. The city planning function includes identification of capital needs, costs, and other information needed to calculate SDCs in the UGAs -- without the corresponding responsibility for service provision or development permitting and, it follows, SDC collection.
2. Service Provision. The County is ultimately responsible for service provision in the unincorporated County – including the urban growth areas around cities. Oregon law provides for the identification and codification of service providers through the urban service agreement. It will be necessary to clarify through urban service agreements a cooperative process for the identification, scheduling, and financing of transportation and parks projects within the Urban Growth Area and who is to be responsible for constructing the planned projects.
3. Fee Adoption, Collection and Accounting. The fact that the County is the permitting agency for all development in the unincorporated County means that only the County can collect, and subsequently distribute SDCs to the service provider. The County agrees to validate, adopt, and collect transportation and parks SDCs calculated to apply in each UGA upon the adoption of such SDCs for transportation and parks within the Urban Growth Areas. The identified "service provider" would be the recipient of related system development charges collected on its behalf in the UGA.

In practice, the roles will interrelate in the following manner. Each city, in collaboration with the County and any other service providers in its UGA, would plan for its UGA

according to the process contained in the applicable urban services agreement. The identification and prioritization of needs, projects, scheduling and associated costs identified in the plan would serve as the primary basis for the SDC to apply in the UGA.

This Memorandum of Understanding is entered into by:

Columbia County	City of Scappoose	City of St. Helens
_____	_____	_____
Title:	Title:	Title:
_____	_____	_____

Appendix D

Technical Analysis

Columbia County
Transportation & Parks SDC Feasibility Study

Transportation SDC Calculation

Improvement Fee	District 1	District 2	District 3	District 4
Capacity Expanding CIP	$ 9,452,768	$4,508,728	$4,952,495	$9,321,215
Growth to End of Planning Period				
Average Daily Trip Growth to 2025 [1]	41,597	6,408	4,675	4,661
Peak-Hour Trip Growth [2]	4,160	641	468	466
Improvement Fee				
Per Peak-Hour Trip	$ 2,272	$ 7,036	$ 10,594	$ 19,998

Example Improvement Fees (Per Average Daily Trip)

Customer Type	District 1	District 2	District 3	District 4	Est. Daily Trips
1 SFR	$ 2,174.75	$ 6,733.54	$ 10,138.05	$ 19,138.39	9.57 per DU
2 Apartments	$ 1,506.64	$ 4,664.93	$ 7,023.54	$ 13,258.88	6.63 per DU
3 General Office Bldg.	$ 2,131.57	$ 6,599.85	$ 9,936.77	$ 18,758.42	9.38 per 1,000 sq. ft.
4 Retail: hardware / paint store	$ 7,808.19	$ 24,176.01	$ 36,399.52	$ 68,714.21	34.36 per 1,000 sq. ft.
5 Supermarket	$ 14,698.30	$ 45,509.44	$ 68,519.23	$ 129,349.10	64.68 per 1,000 sq. ft.
6 Light Manufacturing	$ 1,268.03	$ 3,926.14	$ 5,911.21	$ 11,159.06	5.58 per 1,000 sq. ft.
7 Heavy Manufacturing	$ 695.37	$ 2,153.04	$ 3,241.63	$ 6,119.48	3.06 per 1,000 sq. ft.

Example Improvement Fees (Per Peak-Hour Trip)

Customer Type	District 1	District 2	District 3	District 4	Est. P-H Trips [3]
1 SFR	$ 2,295.19	$ 7,106.45	$ 10,699.51	$ 20,198.30	1.01 per DU
2 Apartments	$ 1,408.93	$ 4,362.38	$ 6,568.02	$ 12,398.96	0.62 per DU
3 General Office Bldg.	$ 3,385.97	$ 10,483.78	$ 15,784.42	$ 29,797.49	1.49 per 1,000 sq. ft.
4 Retail: hardware / paint store	$ 8,135.42	$ 25,189.21	$ 37,924.99	$ 71,593.97	3.58 per 1,000 sq. ft.
5 Supermarket	$ 15,202.78	$ 47,071.45	$ 70,871.00	$ 133,788.73	6.69 per 1,000 sq. ft.
6 Light Manufacturing	$ 2,227.01	$ 6,895.37	$ 10,381.70	$ 19,598.35	0.98 per 1,000 sq. ft.
7 Heavy Manufacturing	$ 1,681.62	$ 5,206.71	$ 7,839.24	$ 14,798.75	0.74 per 1,000 sq. ft.

[1] From 1998 Rural TSP.
[2] 10% of average daily trips.
[3] Source: Institute of Transportation Engineers, Trip Generation, 7th Edition.

#	Location	Description	Planned Cost [1]	Current Cost [2]	Capacity after Improvement	Current required Capacity [3]	Projected ADT	% to Growth	Total Capacity Increase	Location (Note % in Each) District 1	District 2	District 3	District 4	SDC-Eligible Costs by District District 1	District 2	District 3	District 4
	SAFETY													$ -	$ -	$ -	$ -
	District 1																
	Sierks	Narrow Road @ Stream		200,000	1,600	340	459.0	35.00%	79%					0	0	0	0
	Caanan	Guardrail		450,000	1,900	1,400	1,890.0	35.00%	26%	100%				70,000	0	0	0
	S-V	Guardrail		200,000	4,000	2,200	2,970.0	35.00%	45%	100%				157,500	0	0	0
	Pittsburg / Brinn int	Intersection Realignment	347,000	400,000	2,200	600	810.0	35.00%	73%	100%				70,000	0	0	0
	Railroad / Old Portland Rd	Realignment or Signal		750,000	3,300	250	337.5	35.00%	92%	100%				140,000	0	0	0
	Cater / Scappoose-Vernonia	Realignment	229,000	263,301	2,200	770	1,039.5	35.00%	65%	100%				262,500	0	0	0
	Wickstrom / Scappoose-Vern	Realignment	347,000	400,000	4,000	1,000	1,350.0	35.00%	75%	100%				92,155	0	0	0
														140,000	0	0	0
	District 2													0	0	0	0
	Neer City Cemetery / Neer City	Intersection Sight Distance		200,000	1,200	50	67.5	35.00%	96%					0	0	0	0
	Apiary / Fernhill	Sight Distance	12,000	30,000	4,000	200	270.0	35.00%	95%		100%			0	70,000	0	0
	Apiary / Simmons	Sight Distance		20,000	1,200	50	67.5	35.00%	96%		100%			0	10,500	0	0
	Fernhill / Ferncrest	Sight Distance	12,000	30,000	1,800	100	135.0	35.00%	94%		100%			0	7,000	0	0
											100%			0	10,500	0	0
	District 3													0	0	0	0
	Keasey / Stoney Point Int	Sight Distance		100,000	1,500	200	270.0	35.00%	87%					0	0	0	0
	Keasey	Guardrail		250,000	1,400	600	810.0	35.00%	57%			100%		0	0	35,000	0
												100%		0	0	87,500	0
	District 4													0	0	0	0
	Beaver Falls / Mustola Rd	Intersection Realignment		150,000	1,000	50	67.5	35.00%						0	0	0	0
	Beaver Falls / Quincy Mayger	Intersection Realignment	363000	417,373	3,000	300	405.0	35.00%	90%				100%	0	0	0	52,500
													100%	0	0	0	146,080
	LANDSLIDE MOVEMENT													0	0	0	0
	District 1													0	0	0	0
	Oester			250,000	1,500	450	607.5	17.50%	70%					0	0	0	0
	Mt View			225,000	1,500	70	94.5	17.50%	95%	100%				43,750	0	0	0
										100%				39,375	0	0	0
	District 2													0	0	0	0
	Neer City			250,000	1,500	300	1,080.0	17.50%	47%					0	0	0	0
											100%			0	43,750	0	0
	District 3													0	0	0	0
														0	0	0	0
	District 4													0	0	0	0
	Olson Rd			250,000	1,500	40	54.0	17.50%	97%					0	0	0	0
													100%	0	0	0	43,750
														0	0	0	0
	BRIDGE													0	0	0	0
														0	0	0	0
	District 1													0	0	0	0
	JP West			800,000	6,000	800	1,080.0	35.00%	87%					0	0	0	0
	Ross Rd		400000	459,915	6,000	500	675.0	35.00%	92%	100%				280,000	0	0	0
	Anderson Rd		425000	488,660	1,800	40	54.0	35.00%	98%	100%				160,970	0	0	0
										100%				171,031	0	0	0
	District 2													0	0	0	0
	None													0	0	0	0
														0	0	0	0
	District 3													0	0	0	0
	Pebble Creek (match to HBRR)			250,000	4,000	250	337.5	35.00%	94%					0	0	0	0
												100%		0	0	87,500	0
	District 4													0	0	0	0
	Beaver Falls - 2 (match to HBRR)			380,000	3,200	1,200	1,620.0	35.00%	63%					0	0	0	0
	Beaver Dike Bridge			400,000	3,200	360	486.0	35.00%	89%				100%	0	0	0	133,000
													100%	0	0	0	140,000
														0	0	0	0
	ROADWAY													0	0	0	0
														0	0	0	0
	District 1													0	0	0	0
	Scappoose - Vernonia	Widen, resurface	2000000	2,299,574	2,000	1,000	1,350.0	35.00%	50%					0	0	0	0
	Sykes	Widen	350000	402,425	3,800	700	945.0	35.00%	82%	100%				804,851	0	0	0
	Saulser	Widen		300,000	3,800	350	472.5	35.00%	91%	100%				140,849	0	0	0
	Bachelor Flat, Berg, Bennett,Hazen	Widen	3304000	3,788,896	5,000	700	945.0	35.00%	86%	100%				105,000	0	0	0
	Gable (Hwy to Bachelor Flat)	Widen, resurface, bike, drainage	350000	1,250,000	5,000	3,500	4,725.0	35.00%	30%	100%				1,329,614	0	0	0
														437,500	0	0	0

#	Location	Description	Planned Cost [1]	Current Cost [2]	Capacity after Improvement	Current required Capacity [3]	Projected ADT	% to Growth	Total Capacity Increase	Location (Note % in Each) District 1	District 2	District 3	District 4	SDC-Eligible Costs by District District 1	District 2	District 3	District 4
	Cater	Resurface		450,000	1,500	770	1,039.5	17.50%	49%	100%				78,750	0	0	0
	West Lane	Widen, resurface, bike, drainage		680,154	6,100	1,270	1,714.5	35.00%	79%	100%				238,054	0	0	0
	Wickstrom	Widen, resurface	1000000	1,149,787	2,000	1,000	1,350.0	35.00%	50%	100%				402,425	0	0	0
	Scappoose - Vernonia	Pullout		300,000	2,000	1,000	1,350.0	35.00%	50%	100%				105,000	0	0	0
	Johnson Landing	Widen resurface		250,000	5,300	950	1,282.5	35.00%	82%	100%				87,500	0	0	0
	Ross Rd	Widen		350,000	3,800	500	675.0	35.00%	87%	100%				122,500	0	0	0
	EM Watts	Widen, resurface		1,000,000	3,200	1,200	1,620.0	35.00%	63%	100%				350,000	0	0	0
	Dutch Canyon	Widen, resurface		1,200,000	3,200	1,380	1,863.0	35.00%	57%	100%				420,000	0	0	0
	Pittsburg	Widen resurface		2,000,000	1,800	800	1,080.0	35.00%	56%	100%				700,000	0	0	0
	Pittsburg	Pave gravel		200,000	1,800	100	135.0	35.00%	94%	100%				70,000	0	0	0
	JP West	Widen		500,000	1,800	800	1,080.0	35.00%	56%	100%				175,000	0	0	0
	Columbia (Scappoose)	Widen, resurface		500,000	5,200	1,100	1,485.0	35.00%	79%	100%				175,000	0	0	0
	Honeyman	Widen for industrial		400,000	4,000	1,200	1,620.0	35.00%	70%	100%				140,000	0	0	0
	Chapman / Kingsley	resurface		350,000	1,400	800	1,080.0	17.50%	43%	100%				61,250	0	0	0
	District 2													0	0	0	0
	Anlicker	Pave (currently gravel)	2719000	3,126,271	2,500	250	337.5	35.00%	90%					0	0	0	0
	Apiary	Resurface, pullouts		1,200,000	2,000	1,200	1,620.0	17.50%	40%		100%			0	1,094,195	0	0
	Apiary / Old Rainier to US 30	New alignment	1022000	1,175,082	4,000	1,200	1,620.0	35.00%	70%		100%			0	210,000	0	0
	Apiary / Old Rainier	Intersection Realignment	678000	780,000	4,000	1,200	1,620.0	35.00%	70%		100%			0	411,279	0	0
	Rockcrest & Mill & Dike	Widen, resurface		450,000	3,200	1,100	1,485.0	35.00%	66%		100%			0	273,000	0	0
	Beaver Springs	Widen, resurface		800,000	2,800	600	810.0	35.00%	79%		100%			0	157,500	0	0
	Near City	Widen resurface (detour route)		1,300,000	2,000	600	810.0	35.00%	70%		100%			0	280,000	0	0
	Graham	Resurface (park)		150,000	3,200	220	297.0	35.00%	93%		100%			0	455,000	0	0
	Fernhill (at C to Ferncrest)	Widen, resurface		1,250,000	2,500	2,000	2,700.0	35.00%	20%		100%			0	52,500	0	0
	Alston - Mayger	Widen, resurface		1,000,000	2,800	1,000	1,350.0	35.00%	64%		100%			0	437,500	0	0
	District 3													0	350,000	0	0
	Scappoose - Vernonia	Widen, resurface	2000000	2,299,574	2,000	700	945.0	35.00%	65%					0	0	0	0
	Apiary	Resurface, pullouts		1,200,000	2,000	700	945.0	17.50%	65%			100%		0	0	0	0
	Timber	Resurface	3623000	4,165,679	2,600	600	810.0	35.00%	77%			100%		0	0	804,851	0
	Knott St	Widen, resurface, bike		600,000	4,900	120	162.0	35.00%	98%			100%		0	0	210,000	0
	Banzer	Widen resurface		400,000	4,200	200	270.0	35.00%	95%			100%		0	0	1,457,987	0
	Fishhawk	Widen, resurface		700,000	3,600	1,000	1,350.0	35.00%	72%			100%		0	0	210,000	0
	Mellinger & Stoney Point	Pave and Resurface		200,000	2,000	200	270.0	35.00%	90%			100%		0	0	140,000	0
	Pebble Creek & McDonald	Resurface		1,000,000	1,800	300	405.0	17.50%	81%			100%		0	0	245,000	0
	Cleveland	Pave (currently gravel)		250,000	3,200	20	27.0	35.00%	99%			100%		0	0	70,000	0
	District 4													0	0	175,000	0
	Delena - Mayger	Pave (currently gravel)	1894000	2,177,697	1,900	50	67.5	35.00%	97%					0	0	87,500	0
	Beaver Falls	Widen, resurface, bike, scenic	3000000	9,198,297	1,500	400	540.0	35.00%	73%				100%	0	0	0	0
	Swedetown	Resurface	2642000	3,037,737	1,200	1,200	1,620.0	35.00%	0%				100%	0	0	0	762,194
	Mayger	Widen, resurface		1,250,000	2,000	700	945.0	35.00%	65%				100%	0	0	0	3,219,404
	Cedar Grove	Widen, resurface (detour route)		750,000	2,000	700	945.0	35.00%	65%				100%	0	0	0	1,063,208
	Conyers Creek	Widen, resurface		750,000	2,000	500	675.0	35.00%	75%				100%	0	0	0	437,500
	Marshland & Midland	Widen, reconstruct (Recreational)		1,000,000	3,500	160	216.0	35.00%	95%				100%	0	0	0	262,500
														0	0	0	262,500
	BIKE / PED													0	0	0	350,000
	District 1													0	0	0	0
														0	0	0	0
	Old Portland Road (St Helens)			600,000	4,500	4,500	6,075.0	35.00%	0%	100%				0	0	0	0
	Fairgrounds Access Rds			1,500,000	4,000	700	945.0	35.00%	83%	100%				0	0	0	0
	Gable			500,000	6,000	3,300	4,455.0	35.00%	45%	100%				210,000	0	0	0
	Bachelor Flat & Hazen & Berg			1,250,000	6,000	750	1,012.5	35.00%	88%	100%				525,000	0	0	0
	Ross Rd			400,000	6,000	500	675.0	35.00%	92%	100%				175,000	0	0	0
														437,500	0	0	0
	District 2													140,000	0	0	0
	Old Hwy 30		1000000	1,149,787	3,300	1,100	1,485.0	35.00%	67%					0	0	0	0
	Larson @ Hudson Park			300,000	4,100	600	810.0	35.00%	85%		100%			0	402,425	0	0
											100%			0	105,000	0	0
	District 3													0	0	0	0
														0	0	0	0
	Timber Rd			3,000,000	3,200	600	810.0	35.00%	81%					0	0	0	0
	Knott Street (CZ Trail)			300,000	4,000	120	162.0	35.00%	97%				100%	0	0	1,050,000	0
														0	0	105,000	0

#	Location	Description	Planned Cost [1]	Current Cost [2]	Capacity after Improvement	Current required Capacity [3]	Projected ADT	% to Growth	*Total Capacity Increase*	Location (Note % in Each) District 1	District 2	District 3	District 4	SDC-Eligible Costs by District District 1	District 2	District 3	District 4
	District 4																
	Beaver Falls (Clatskanie to Quincy)			6,000,000	2,200	1,500	2,025.0	35.00%	*32%*					0	0	0	0
	Conyers Creek			600,000	3,800	1,000	1,350.0	35.00%	*72%*				100%	0	0	0	2,100,000
													100%	0	0	0	210,000
	STUDIES																
														0	0	0	0
														0	0	0	0
	Westside Arterial	Feasibility	100000	114,979	n/a				*100%*	100%				114,979	0	0	0
	Transp. System Plan	Update and Refinement		240,000	n/a				*100%*	25%	25%	25%	25%	60,000	60,000	60,000	60,000
	Transp. Demand Mgmt		40000	120,000	n/a				*100%*	25%	25%	25%	25%	30,000	30,000	30,000	30,000
														0	0	0	0
														0	0	0	0
	Mass Transportation													0	0	0	0
														0	0	0	0
	District 1													0	0	0	0
	Park & Ride @ S-V or County Line		330000	379,430	n/a				*50%*	100%				189,715	0	0	0
														0	0	0	0
	District 2													0	0	0	0
	Park & Ride @ Larson		169000	194,314	n/a				*50%*		50%		50%	0	48,579	0	48,579
														0	0	0	0
	District 3													0	0	0	0
	Park & Ride on Hwy 47		169000	194,314	n/a				*50%*			100%		0	0	97,157	0
														0	0	0	0
	District 4													0	0	0	0
	None													0	0	0	0
														0	0	0	0
	Totals		$ 33,525,000	$ 82,048,246										$ 9,452,768	$ 4,508,728	$ 4,952,495	$ 9,321,215

[1] From 1998 Rural TSP.

[2] In current year $; reflects the following ENR assumptions for 1998 planned costs:

1999 ENR Seattle area construction cost index:	6,957.81
Current (3/04) Seattle area construction cost index:	8,000.00

[3] Should be an estimate of current needed, not actual, capacity.

Columbia County
Transportation & Parks SDC Feasibility Study

Transportation Customer Data Needed (Rural County only)

Trip Growth Adjustment

1998 Total County Population	**42,690**	*Source: Population Research Center, Portland State University. 1990-2000 County Intercensal Estimates (July 1).*
Rural % of 2000 County Population	49.1%	
Annual % Decrease in Rural's Share	-0.9%	*Based on 1990 and 2000 rural and incorporated county population surveys (U.S. Census Bureau). Source: 2004 Oregon Population Report*
Rural Share of 1998 Population	**50.0%**	
1998 Rural County Population	**21,346**	
Current Rural County Population	**21,340**	
2025 Rural County Population	**21,734**	
Total Rural County Population Growth: 1998 to 2025	388	
Rural County Population Growth: 1998 to Current	-6	
% of Rural Population Growth Currently Fulfilled	**0.00%**	

Columbia County
Transportation & Parks SDC Feasibility Study

Parks SDC Calculation

Improvement Fee

Capacity Expanding CIP	$	1,565,884	
Growth to End of Planning Period		394	persons
Improvement Fee Unit Cost	$	3,975.97	per person

Columbia County
Transportation & Parks SDC Feasibility Study

Parks Capital Plan

#	Location	Description	Planned Cost [1]	Current Cost [2]	Capacity after Improvement	Current required Capacity [3]	% to Growth	SDC-eligible Cost
1	Scappoose RV Park	Day use parking	$ 40,000	$ 40,000	10 spaces	3 spaces	70%	$ 28,000
		Tent sites	40,000	40,000	7 sites	4 sites	43%	17,143
2	Fisher Park	Development	150,000	150,000	8.4 acres	0 acres	100%	150,000
3	JJ Collins Park	(none)		0			0%	0
4	Gilbert River Boat Ramp	(none)		0			0%	0
5	Chapman Landing	Development	200,000	200,000	10 acres	7 acres	30%	60,000
6	CZ Trail	Access Improvements	200,000	200,000	40 spaces	30 spaces	25%	50,000
7	Asburry Acres	Development	350,000	350,000	27 acres	20 acres	26%	90,741
8	Prescott Beach	Acquisition and Camping	500,000	500,000	40 spaces	20 spaces	50%	250,000
		Restroom and Showers	200,000	200,000	4 stalls	2 stalls	50%	100,000
		Trail	40,000	40,000	2 miles	1.5 miles	25%	10,000
9	Laurel Beach	(none)		0			0%	0
10	Dibblee Island	(none)		0			0%	0
11	Hudson Park	Restroom / Shower	200,000	200,000	8 stalls	6 stalls	25%	50,000
		Add'l RV Sites	200,000	200,000	10 sites	0 sites	100%	200,000
		Parking Expansion	40,000	40,000	10 spaces	5 spaces	50%	20,000
12	Beaver Falls	Parking and Trail Development	150,000	150,000	20 spaces	10 spaces	50%	75,000
13	Beaver Boat Ramp	Parking Lot Expansion	100,000	100,000	50 spaces	40 spaces	20%	20,000
14	Mist Park	Development	80,000	80,000	4 lots	2 lots	50%	40,000
15	Camp Wilkerson	Restroom / Shower	200,000	200,000	8 stalls	6 stalls	25%	50,000
		Horse Camp Expansion	150,000	150,000	15 sites	10 sites	33%	50,000
		RV Site Development	150,000	150,000	15 sites	10 sites	33%	50,000
		Additional Cabins	90,000	90,000	6 cabins	4 cabins	33%	30,000
16	Carcus Creek Park	(none)					0%	0
17	Big Eddy Park	RV Site Development	100,000	100,000	40 sites	30 sites	25%	25,000
18	Scaponia Park	Acquisition / Development	400,000	400,000	20 acres	15 acres	25%	100,000
19	All Parks	Master Plan Development	200,000	200,000			50%	100,000
20				0			0%	0
21				0			0%	0
Totals			**$ 3,780,000**	**$ 3,780,000**				**$ 1,565,884**

[1] Note year of estimate.
[2] In current year $; reflects the following ENR assumptions:

Seattle area construction cost index for date of estimate:	7,910.00
Current (3/04) Seattle area construction cost index:	7,910.00

[3] Should be an estimate of current needed, not actual, capacity, as per adopted County parks planning standards.

Columbia County
Transportation & Parks SDC Feasibility Study

Parks Customer Data Needed (Rural County only)

County Population Components

Portland State University	*July 1st of year:*	2000	2001	2002	2003	2004	Average Rate	Compounded
Rural County Population Estimates		21,450	21,630	21,290	20,830	21,210		
Annual Growth Rate (county)			0.84%	-1.57%	-2.16%	1.82%	**-0.27%**	**-0.28%**
Incorporated County Population Estimates		*22,250*	*22,670*	*23,310*	*24,170*	*24,440*	*Average %*	*Rate of Decline*
Rural % of Total County Population		***49.1%***	***48.8%***	***47.7%***	***46.3%***	***46.5%***	***47.33%***	***-1.36%***

Source: Population Research Center, Portland State University. 2004 Oregon Population Report. Population Estimates

U.S. Census Bureau	*April 1st of year:*	1990	2000			Est. 2025		Compounded
Rural County Population		20,316	21,479			24,686		**0.56%**
Incorporated County Population Estimates		*17,241*	*22,081*				*Average %*	*Rate of Decline*
Rural % of Total County Population		*54.1%*	***49.3%***				***51.70%***	***-0.92%***

Source: Population Research Center, Portland State University. 2004 Oregon Population Report. Population Estimates

Forecast of Rural Share of Total County Population -- Based on Census Burea Data							
Result: conservatively high estimates of rural county's % share	2001	2002	2003	**2004**	2005	2006	2007
	48.9%	48.4%	48.0%	**47.5%**	47.1%	46.6%	46.2%
Implied rural county population (State forecast paired with Census % Rural)					21,645		

Office of Economic Analysis	*July 1st of year:*	2000	2005	2010	2015	2020	2025	Average Rate	Compounded
County Population Forecast	**April 2004**	43,700	45,977	48,292	50,882	53,562	56,354		
Annual Growth Rate (county)	**Calculated (compounded rate)**		1.021%	0.987%	1.050%	1.032%	1.021%	**1.022759%**	**1.022756%**
	Reported (average rate)		*1.016%*	*0.982%*	*1.045%*	*1.027%*	*1.016%*		

Source: Oregon State Office of Economic Analysis, Forecasts of Oregon's County Populations and Components of Change, 2000 - 2040.
Report release date: April 2004. Base year for population forecast: July 1, 2000.

Current Conditions

2005 Total County Population	46,220	*Source: Population Research Center, Portland State University. 2005 Certified Population Estimates (as of July 1, 2005).*
less: Incorporated County Population		
Clatskanie	1,660	*Source: Population Research Center, Portland State University. 2005 Certified Population Estimates (as of July 1, 2005).*
Columbia City	1,785	*Source: Population Research Center, Portland State University. 2005 Certified Population Estimates (as of July 1, 2005).*
Prescott	60	*Source: Population Research Center, Portland State University. 2005 Certified Population Estimates (as of July 1, 2005).*
Rainier	1,760	*Source: Population Research Center, Portland State University. 2005 Certified Population Estimates (as of July 1, 2005).*
St. Helens	11,640	*Source: Population Research Center, Portland State University. 2005 Certified Population Estimates (as of July 1, 2005).*
Scappoose	5,700	*Source: Population Research Center, Portland State University. 2005 Certified Population Estimates (as of July 1, 2005).*
Vernonia	2,275	*Source: Population Research Center, Portland State University. 2005 Certified Population Estimates (as of July 1, 2005).*
Total Incorporated County Population	24,880	
2005 Total County Population	**21,340**	

Current Rural County Population	**21,340**
# Single-family DUs	
# Multi-family DUs	

Future Conditions

Average rate of annual growth, 2005-2025	1.023%	*Source: Office of Economic Analysis, Forecasts of Oregon's County Populations, 2000 - 2040.*
2005-2025 County Population Factor	1.226	
2025 County Population	**56,652**	
Rural % of 2005 County Population	46.2%	
% Decrease in Rural's Share	-0.9%	*Based on 1990 and 2000 rural and incorporated county population surveys (U.S. Census Bureau). Source: 2004 Oregon Population Report*
Rural Share of 2025 Population	**38.4%**	

Future Rural County Population	**21,734**
# Single-family DUs	
# Multi-family DUs	

Growth

Rural County Population	**394**
# Single-family DUs	0
# Multi-family DUs	0

EXHIBIT 2

SYSTEM DEVELOPMENT CHARGE RATE SCHEDULE

Rural Transportation System Development Charge	$2,250/peak hour trip
Urban Growth Area Tportation System Development Charge	
Within Scappoose UGB	$2,775/peak hour trip
Within St. Helens UGB	$3,084/peak hour trip
Rural Parks System Development Charge	
Single Family Dwelling Unit	$750/dwelling unit
Multi-family Residential Structure	$605.77/dwelling unit

Columbia County Rural Transportation SDC District Map 2007

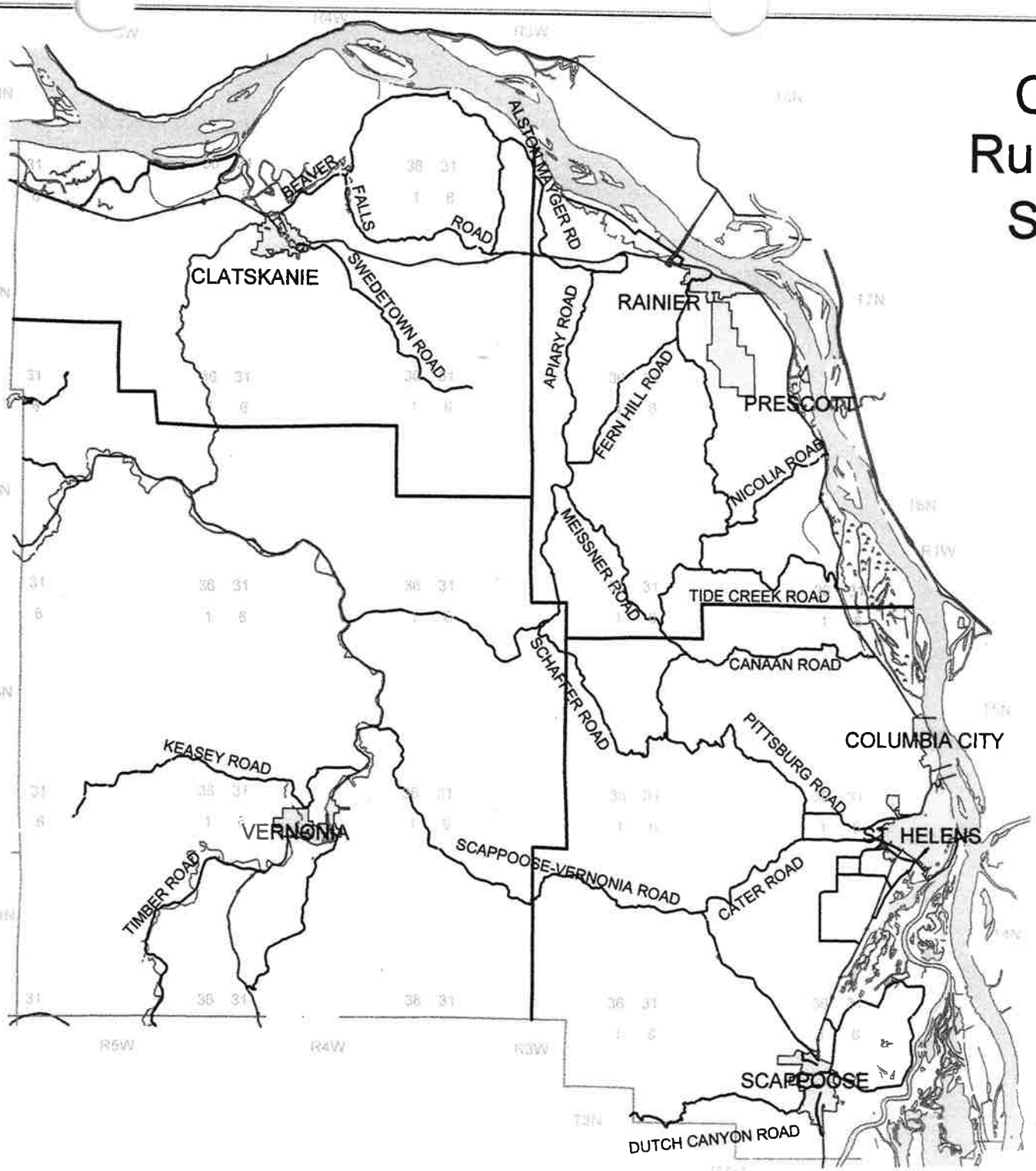


EXHIBIT 3

EXHIBIT 2

RURAL COUNTY SYSTEM DEVELOPMENT CHARGE RATE SCHEDULE

Rural Transportation System Development Charge	$2,250/peak hour trip
Rural Parks System Development Charge	
Single Family Dwelling Unit	$750/dwelling unit
Multi-family Residential Structure	$605.77/dwelling unit

EXHIBIT 3

City of St. Helens, Oregon
System Development Charge Study

Final Report

March 2001

1988 - 2000
12
YEARS OF EXCELLENCE
Financial Consulting Solutions Group, Inc.

FINANCIAL CONSULTING SOLUTIONS GROUP, INC.

March 29, 2001

Mr. Brian Little
City Administrator
City of St. Helens
P.O. Box 278
St. Helens, OR 97051

RE: System Development Charge Study – Final Report

Dear Mr. Little:

Financial Consulting Solutions Group, Inc. (FCS Group) is pleased to provide this final report on the City of St. Helens System Development Charge (SDC) Study. This study resulted in the following proposed SDCs, considered and adopted by the St. Helens City Council:

Service	Existing SDC	Proposed SDC	Basis
Water	**$1,131.00**	**$2,530.00**	per Equivalent Residential Unit
Wastewater	**$903.00**	**$1,271.00**	per Equivalent Residential Unit
Stormwater	**$90.50**	**$230.00**	per 1,000 Square Feet of Impervious Area
Transportation	**$60.71**	**$322.00**	per Daily Trip End
Parks	**$564.00**	**$814.00** **$657.00**	per Single Family Dwelling Unit per Multi-family Dwelling Unit

The report is organized by major section:

I. Introduction / Background
II. SDC Methodology
III. Water
IV. Sanitary Sewer
V. Stormwater
VI. Transportation (Streets)
VII. Parks
VIII. Conclusion

Copies of the supporting analysis, the adopting ordinance, and the fee resolution are provided in report appendices.

We want to thank you and City staff for your cooperation and timely support during this study. It has been a pleasure working with you and the City of St. Helens. Please do not hesitate to call if you have any questions about this report.

Very truly yours,

John Ghilarducci
Project Manager

Edward J. Cebron
Principal-in-charge

FINANCIAL CONSULTING SOLUTIONS GROUP, INC.
8642 - 154th AVE NE ■ REDMOND, WA 98052 ■ VOICE: 425-867-1802 ■ FAX: 425-867-1937 ■ www.fcsgroup.com

City of St. Helens
System Development Charge Study

Final Report
Table of Contents

I. Introduction / Background

In March of 2000, the City of St. Helens contracted with Financial Consulting Solutions Group, Inc. (FCS Group); Murray, Smith & Associates (MSA); and Shaun Pigott Associates (SPA) to perform a System Development Charge (SDC) study for the City's water, sanitary sewer, stormwater, transportation, and parks services.

A. Background

Located thirty miles northwest of Portland on the Columbia River, the City of St. Helens is the Columbia County seat and the home of approximately 9,600 residents. It has exhibited steady growth of approximately three percent per year since the early 1900s.

The City of St. Helens initially adopted system development charges for each of the five eligible services between 1990 and 1993. Since that time, the City has updated its water master plan and adopted a new transportation system plan, a new parks master plan, and an updated stormwater master plan. An SDC update was needed to reflect this new information. In addition, the City's existing sanitary sewer SDC was calculated based on needed treatment plant improvements, but without needed trunk lines. The charges calculated and proposed in this study included the needed sewer trunks, as identified by MSA and City staff. A separate study that will refine these estimates is currently underway.

B. Scope of Services

The following SDC study objective was provided in the City's request for qualifications:

> "The selected consultant will be expected to provide full services associated with development of SDC methodologies and the development of rational, defensible, system development charges for sewer, water, storm sewer, streets, and parks."

To meet this objective, a study task plan was developed that consisted of the following major tasks:

1. **Collect and review data.** Provide a data needs list to the City. Meet with the City to review initial data, discuss policy objectives, and kickoff the study.
2. **Review master plans for SDC eligible projects and associated costs.** Review the adopted public facilities plan, as well as the water, stormwater, transportation, and parks master plans for information to be used in the study. Review the older sanitary sewer master plan and assess the usability of the information in the plan. Compile a preliminary list of projects and associated estimated costs from the plan and from the additional expertise of the project engineer and City staff (for project types not addressed in the plan, such as trunk lines).
3. **Establish SDC Policy Framework.** Evaluate and recommend an appropriate policy framework for the SDC analysis based on City objectives.
4. **Develop and Complete Technical Analysis.**
   - Calculate reimbursement fees using information supplied by the City and applying it to the methodology recommended by the consultant in Task 3.

- Calculate improvement fees using information supplied by the City and applying it to the methodology recommended by the consultant in Task 3.

5. **Meetings and Presentations.** Prepare for and attend staff work sessions, public meetings, and City Council meetings in support of project team findings.
6. **Documentation.** Prepare draft and final reports for review by the City. Prepare a draft ordinance reflecting the recommended fees and fee structures.

II. System Development Charge Methodology

A system development charge is a one-time fee imposed on new development or some types of re-development at the time of development. The fee is intended to recover a fair share of the costs of existing and planned facilities that provide capacity to serve growth.

Oregon Revised Statute 223.297 - 223.314 defines SDCs and specifies how they shall be calculated, applied, and accounted for. By statute, an SDC is the sum of two components:

- a **reimbursement fee**, designed to recover costs associated with capital improvements *already constructed or under construction*, and
- an **improvement fee**, designed to recover costs associated with capital improvements *to be constructed in the future*.

The reimbursement fee methodology must consider such things as the cost of existing facilities and the value of unused capacity in those facilities. The calculation must also ensure that future system users contribute no more than their fair share of existing facilities costs. Reimbursement fee proceeds may be spent on any capital improvements related to the systems for which the SDC applied. Water SDCs must be spent on water improvements, sewer SDCs must be spent on sewer improvements, etc.

The improvement fee methodology must include only the cost of projected capital improvements needed to increase system capacity. In other words, the cost(s) of planned projects which correct existing deficiencies, or do not otherwise increase capacity, may not be included in the improvement fee calculation. Improvement fee proceeds may be spent only on capital improvements, or portions thereof, which increase the capacity of the systems for which they were applied.

In general, the proposed SDCs were calculated by adding the applicable reimbursement fee component to the applicable improvement fee component. Under the approach taken, each separate component was calculated by dividing the eligible cost by the appropriate measure of growth in capacity. The unit of capacity used became the basis of the charge. A sample calculation method is shown below.

Reimbursement Fee		**Improvement Fee**		**SDC**
Eligible cost of capacity in existing facilities / Growth in system capacity	+	Eligible cost of planned capacity-increasing capital improvements / Growth in system capacity	=	SDC ($ / unit)

The improvement fee calculations for each service were complicated by the fact that several of the source planning documents used different population projections as the bases for their recommendations. While this may lead to questions about the consistency of planning assumptions over time, it does not necessarily create internal inconsistencies in the fee calculations. As long as the planning horizon used to develop the capital needs (the numerator) and the planning horizon used to estimate the growth in system capacity (the denominator) are the same, the fee is internally consistent. Care has been taken to ensure that this is the case for each service.

III. Water

The City's existing practice is to charge new water connections an SDC of $1,131 per water equivalent residential unit (ERU)[1] based on their projected water demand. The proposed system development charge was calculated using this approach. An alternative SDC was also calculated using a per account basis. Often, water SDCs are imposed by meter size. In this case, customer account records provided the number of water accounts by customer class, but not by meter size.

The calculations of the proposed and alternative SDCs are summarized below and provided in detail in Appendix A.

A. Capacity Basis

The City had little information on billed water usage, so annual usage was estimated in the following manner. First, water production records were used to identify water production for a recent twelve-month period, September 1999 through August 2000. These records indicated total water production of approximately 784 million gallons for the year. In order to adjust for water losses, we next calculated a water loss factor by comparing the minimum water production month to the average dry weather wastewater flow for a month. This relationship indicated a water loss factor of 41%. The loss factor applied to total water production resulted in an estimated annual usage figure of 464 million gallons. Using the assumed water ERU value of 230 gallons per day, that converts to an ERU total of 5,527.

The 1993 Water System Master Plan, used as the basis for the list of planned capital improvements, targets a future population of 16,822 to be served by the fully constructed system. The City's 1999 population was estimated to be 9,300. Growth in ERUs was estimated by "growing" the ERU total proportionately with population growth, first to the 2000 estimated population of 9,600, and then to 16,822. Using this method, the existing number of ERUs was estimated to be 5,705. The number of ERUs at population 16,822 was projected to be 9,998. Growth in ERUs, or capacity, was then estimated to be 4,292. A summary of key customer information is provided in Table III-1 below.

Table III-1
Water SDC Capacity Basis

Description	1999	Current	End of Period	Net Growth
Population	9,300	9,600	16,822	7,222
# of Accounts	3,504	3,608	6,322	2,714
Annual Usage (MG)	464	NA	NA	NA
# of ERUs	5,527	5,706	9,998	4,292

[1] One water equivalent residential unit is equal to 230 gallons per day usage.

B. Reimbursement Fee Calculation

In order to estimate the cost of unused capacity in the existing water system, the numerator in the reimbursement fee calculation, and calculate the fee, the following approach was taken.

- Using the March 30, 2000 detail of water utility plant-in-service, the original cost of utility plant-in-service – land, building and improvements, machinery and equipment, utility plant and systems, transmission and distribution mains, etc. – was compiled and adjusted as follows:
  - Construction work in progress (CWIP), $1,820,000, was added;
  - Past contributions in aid of construction, $1,414,290, were deducted;
  - Net utility debt principal outstanding, $0 at the time of the study, was deducted.
- With the assistance of Murray, Smith and Associates, the project team evaluated each asset item, first for its capacity relevance, and second for the amount of unused capacity present. Only utility plant and systems, which included the Lamont Street pump station, transmission and distribution mains, and CWIP were found to have available capacity. Construction work in progress is made up of Ranney Collector #3, which will add capacity to the existing system. It is allocated 100% to the fee cost basis. Approximately forty-three percent of the costs of the Lamont Street pump station and transmission and distribution mains were allocated to the reimbursement fee cost basis using the following rationale: of the ultimate projected system capacity (9,998 ERUs), 4,292 ERUs of capacity, or 43%, is currently available to serve growth. No unused capacity was assumed for other asset classifications.
- The sum of the costs of unused capacity for each asset item less a proportionate share of contributions, or $4,930,942, became the reimbursement fee cost basis.
- The alternative reimbursement fees were then calculated as the reimbursement fee cost basis divided by forecasted growth in system capacity, first, in ERUs and, secondly, in accounts. The results of these calculations were alternative reimbursement fees of $1,149 per ERU (projected demand) or $1,817 per account.

C. Improvement Fee Calculation

The following approach was taken to determine the cost of capacity-increasing capital improvements, the numerator in the improvement fee calculation, and calculate the fee.

- With the assistance of MSA, City staff compiled a list of needed capital projects using the Water System Master Plan, the current public facilities plan, and staff expertise. The sum of this list of project costs, adjusted to 2000 dollars, was $18,137,772.
- City staff and the project team then allocated a portion of the cost of each capacity-increasing project to the improvement fee cost basis depending upon the type and use of the project. The sum of this list of capacity-increasing project costs, the gross improvement fee cost basis, was $6,662,795.
- Next, the current water SDC improvement fee fund balance, $800,103, was deducted from the gross improvement fee cost basis to (1) recognize that the fund balance is

available for spending on the project list and (2) prevent new customers from paying for those project costs twice. This result, $5,862,692, was the improvement fee cost basis.

- Alternative improvement fees were then calculated as the improvement fee cost basis divided by forecasted growth in system capacity, first, in ERUs and, secondly, in accounts. The results of these calculations were alternative improvement fees of $1,366 per ERU (projected demand) or $2,160 per account.

D. Recommended System Development Charge

The recommended water SDC is the sum of the reimbursement fee and the improvement fee for the ERU-based alternative, adjusted by an administrative cost recovery factor of 0.58%. The administrative cost recovery factor was derived by dividing annual SDC program accounting and administrative costs, including the amortized cost of this study, by forecasted annual SDC revenues for all services. The resulting recommended SDC is provided in Table III-2 below, with the alternative per account charge provided in Table III-3.

Table III-2
Recommended Water SDC

Unit Description	Reimbursement Fee	Improvement Fee	Administrative Cost Recovery	System Development Charge
Projected Demand in ERUs	$1,149	$1,366	$15	$2,530

Table III-3
Alternative Water SDC

Unit Description	Reimbursement Fee	Improvement Fee	Administrative Cost Recovery	System Development Charge
Number of Accounts	$1,817	$2,160	$23	$4,000

IV. Sanitary Sewer

The City's existing practice is to charge new sanitary sewer connections an SDC of $903 per sanitary sewer equivalent residential unit (ERU)[2] based on their projected usage. The proposed system development charge was calculated using this approach. An alternative SDC was also calculated using a per account basis.

The calculations of the proposed and alternative SDCs are summarized below and provided in detail in Appendix A.

A. Capacity Basis

As with the water records, the City had little information on billed usage. Annual system usage was estimated in the following manner. First, treatment plant influent records were examined to determine average dry weather flow. The most representative month was found to be September 1999, with influent of 31.48 million gallons (excluding Boise Cascade). Next, in order to minimize the inclusion of infiltration and inflow and represent actual system usage by customers, this monthly flow estimate was annualized to 378 million gallons of usage. Using the assumed sanitary sewer ERU value of 221 gallons per day (900 cubic feet per month), that converts to an ERU total of 4,683.

The 1979 St. Helens Vicinity Sewer System Facilities Plan and the 1989 Facilities Plan Update, used in part as the basis for the list of planned capital improvements, targets a future population of 20,067 to be served by the fully constructed system. The City's 1999 population was estimated to be 9,300. Growth in ERUs was estimated by "growing" the ERU total proportionately with population growth, first to the 2000 estimated population of 9,600, and then to 20,067. By this method, the existing number of ERUs was estimated to be 4,834. The number of ERUs at population 20,067 was projected to be 10,105. Growth in ERUs, or capacity, was then estimated to be 5,271. A summary of key customer information is provided in Table IV-1 below.

Table IV-1
Sanitary Sewer SDC Capacity Basis

Description	1999	Current	End of Period	Net Growth
Population	9,300	9,600	20,067	10,467
# of Accounts	3,213	3,317	6,933	3,616
Annual Usage (MG)	378	NA	NA	NA
# of ERUs	4,683	4,834	10,105	5,271

[2] One sanitary sewer equivalent residential unit is equal to 221 gallons per day usage.

B. Reimbursement Fee Calculation

The detailed list of assets used in this analysis initially included stormwater facilities. The sanitary sewer items summarized here, representing 83% of the list by cost, were identified and segregated in a separate tabulation. In order to estimate the cost of unused capacity in the existing sanitary sewer system, the numerator in the reimbursement fee calculation, and calculate the fee, the following approach was taken.

- Using the March 30, 2000 detail of sanitary sewer utility plant-in-service, the original cost of utility plant-in-service – land, building and improvements, machinery and equipment, utility plant and systems, and collection mains – was compiled and adjusted as follows:
  - Construction work in progress (CWIP), $0 at the time of the study, was added;
  - Due to the fact that past contributions in aid of construction were not tracked by function, 83% of contributions, $2,979,660, was deducted;
  - Net utility debt principal outstanding, $269,884, was deducted.
- With the assistance of Murray, Smith and Associates, the project team evaluated each asset item, first for its capacity relevance, and second for the amount of unused capacity present. Only utility plant and systems, which included the sewage treatment plant, was found to have available capacity. Approximately fifty-two percent of the cost of utility plant and systems was allocated to the reimbursement fee cost basis using the following rationale: of the ultimate planned system capacity (10,105 ERUs), 5,271 ERUs of capacity, or 52%, is currently available to serve growth. No unused capacity was assumed for other asset classifications.
- The sum of the costs of unused capacity for each asset item less a proportionate share of both debt outstanding and contributions, or $2,404,194, became the reimbursement fee cost basis.
- The alternative reimbursement fees were then calculated as the reimbursement fee cost basis divided by forecasted growth in system capacity, first, in ERUs and, secondly, in accounts. The results of these calculations were alternative reimbursement fees of $456 per ERU (projected demand) or $665 per account.

C. Improvement Fee Calculation

The following approach was taken to determine the cost of capacity-increasing capital improvements, the numerator in the improvement fee calculation, and calculate the fee.

- With the assistance of MSA, City staff compiled a list of needed capital projects, including trunk lines, using the St. Helens Vicinity Sewer System Facilities Plan and the Facilities Plan update, the current public facilities plan, and staff expertise. The sum of this list of project costs, adjusted to 2000 dollars, was $15,247,487.
- City staff and the project team then allocated a portion of the cost of each capacity-increasing project to the improvement fee cost basis depending upon the type and use of the project. The sum of this list of capacity-increasing project costs, the gross improvement fee cost basis, was $5,341,618.

- Next, the current sanitary sewer SDC improvement fee fund balance, $1,084,583, was deducted from the gross improvement fee cost basis to (1) recognize that the fund balance is available for spending on the project list and (2) prevent new customers from paying for those project costs twice. This result, $4,257,035, was the improvement fee cost basis.

- Alternative improvement fees were then calculated as the improvement fee cost basis divided by forecasted growth in system capacity, first, in ERUs and, secondly, in accounts. The results of these calculations were alternative improvement fees of $808 per ERU (projected demand) or $1,177 per account.

D. Recommended System Development Charge

The recommended sanitary sewer SDC is the sum of the reimbursement fee and the improvement fee for the ERU-based alternative, adjusted by an administrative cost recovery factor of 0.58%. As noted previously, the administrative cost recovery factor was derived by dividing annual SDC program accounting and administrative costs, including the amortized cost of this study, by forecasted annual SDC revenues for all services. The resulting recommended SDC is provided in Table IV-2 below, with the alternative per account charge provided in Table IV-3.

Table IV-2
Recommended Sanitary Sewer SDC

Unit Description	Reimbursement Fee	Improvement Fee	Administrative Cost Recovery	System Development Charge
Projected Demand in ERUs	$456	$808	$7	$1,271

Table IV-3
Alternative Sanitary Sewer SDC

Unit Description	Reimbursement Fee	Improvement Fee	Administrative Cost Recovery	System Development Charge
Number of Accounts	$665	$1,177	$11	$1,853

V. Stormwater

The City's existing practice is to charge new development a stormwater SDC of $90.50 per 1,000 square feet of impervious surface area. Impervious surface area is an accepted and defensible measure of contribution of runoff and associated use of the stormwater system. The proposed system development charge was calculated using this approach.

The calculation of the proposed SDC is summarized below and provided in detail in Appendix A.

A. Capacity Basis

City staff and MSA used detailed City land use information to isolate existing developed land in the City, by land use type, as well as remaining buildable land. The project team found that of 1,930 currently developed acres in the City, 1,055 acres are covered with impervious surface area. It was then assumed that the same proportion, 54.5%, of the 2,001 remaining buildable acres, would be impervious. This analysis indicated that 1,091 acres, or 47,522,862 square feet, of remaining buildable land will be impervious upon full development.

A summary of key customer information is provided in Table V-1 below.

Table V-1
Stormwater SDC Capacity Basis

Description	Developed	Buildable
Gross Area (acres)	1,930	2,001
Impervious Surface Area (acres)	1,055	1,091
Impervious Surface Area (square feet)	NA	47,522,862

B. Reimbursement Fee Calculation

The detailed list of assets used in this analysis initially included both sanitary sewer and stormwater facilities. The stormwater-related items summarized here, representing 17% of the list by cost, were identified and segregated in a separate tabulation. In order to estimate the cost of unused capacity in the existing stormwater system, the numerator in the reimbursement fee calculation, and calculate the fee, the following approach was taken.

- Using the March 30, 2000 detail of stormwater assets, the original cost of utility plant-in-service – land, building and improvements, machinery and equipment, utility plant and systems, etc. – was compiled and adjusted as follows:
  - Construction work in progress (CWIP), $0 at the time of the study, was added;
  - Due to the fact that contributions in aid of construction were not tracked by function, 17% of contributions, $613,301, was deducted;
  - Net debt principal outstanding, $1,026,743, was deducted.

- With the assistance of MSA, the project team evaluated each asset item, first for its capacity relevance, and second for the amount of unused capacity present. Only utility plant and systems was found to have available capacity. Twenty-two percent of the cost of utility plant and systems was allocated to the reimbursement fee cost basis using the rationale that 22% of the system would be available for a 25-year storm at buildout. No unused capacity was assumed for other asset classifications.

- The sum of the costs of unused capacity for each asset item less a proportionate share of both debt outstanding and contributions, or $27,963, became the reimbursement fee cost basis.

- The reimbursement fee was then calculated as the reimbursement fee cost basis divided by the impervious portion of remaining buildable land as an estimate of forecasted growth in system capacity. The result of this calculation was a reimbursement fee unit cost of $0.0006 per thousand square feet of impervious surface area.

C. Improvement Fee Calculation

The following approach was taken to determine the cost of capacity-increasing capital improvements, the numerator in the improvement fee calculation, and calculate the fee.

- With the assistance of MSA, City staff compiled a list of needed capital projects using the Stormwater Master Plan. The sum of this list of project costs was $21,351,000.

- City staff and the project team then allocated a portion of the cost of each capacity-increasing project to the improvement fee cost basis depending upon the type and use of the project. The sum of this list of capacity-increasing project costs, the gross improvement fee cost basis, was $10,889,010.

- Next, the current stormwater SDC improvement fee fund balance, $262,628, was deducted from the gross improvement fee cost basis to (1) recognize that the fund balance is available for spending on the project list and (2) prevent new customers from paying for those project costs twice. This result, $10,626,382, was the improvement fee cost basis.

- The improvement fee was then calculated as the improvement fee cost basis divided by the impervious portion of remaining buildable land as an estimate of forecasted growth in system capacity. The result of this calculation was an improvement fee unit cost of $0.2236 per square foot of impervious surface area.

D. Recommended System Development Charge

The recommended stormwater SDC is the sum of the reimbursement fee and the improvement fee, adjusted by an administrative cost recovery factor of 0.58%. As noted previously, the administrative cost recovery factor was derived by dividing annual SDC program accounting and administrative costs, including the amortized cost of this study, by forecasted annual SDC revenues for all services. The resulting SDC unit cost is provided in Table V-2 below.

Table V-2
Stormwater SDC Unit Cost

Unit Description	Reimbursement Fee	Improvement Fee	Administrative Cost Recovery	System Development Charge
Impervious Surface Area (sq. ft.)	$0.0006	$0.2236	$0.0013	$0.23

The recommended SDC would convert to a charge of $230 per 1,000 square feet of impervious surface area. A developing "typical" single family residence with 2,500 square feet or impervious surface area would pay a stormwater SDC of $575.

VI. Transportation

The City's existing practice is to charge new development a transportation SDC of $60.71 per daily trip end, as estimated in the Institute of Traffic Engineers' *Trip Generation*. Trip end estimates, including average daily trips and peak-hour trips, are accepted and defensible measures of vehicle use of the transportation system. Proposed system development charges were calculated using this approach.

The calculation of the proposed SDC is summarized below and provided in detail in Appendix A.

A. Capacity Basis

Due to a lack of definitive trip information, two different approaches were taken to estimate existing average daily trip ends (ADTEs) in the City. First, we assigned representative ADTE estimates to the customer types identified in the water customer data. Then, we converted the number of in-City water accounts to ADTEs by water customer class. For example, *Trip Generation, 6th Edition*, estimates that an average single family residence generates 9.57 average daily trip ends. So a growth in single family residences of 1,823 accounts converts to growth in average daily trip ends of 17,442. Similar assumptions were made for each customer class, including multi-family residential, small commercial, restaurants, and industrial / large commercial. The derivation of growth in ADTEs under this approach is summarized below in Table VI-1

Table VI-1
Transportation SDC Capacity Basis #1

Method 1	1999	2000	End of Period	Growth	Assumed ADTEs/unit	Total ADTEs Growth
Population	9,300 (1)	9,600 (2)	15,600 (3)	6,000		
Developed Units (from Water)						
Single Family Residential	2,825	2,916	4,739	1,823	9.57 (4)	17,442
Multi-Family Residential	232	239	389	150	6.63 (4)	992
Commercial						
Small Commercial	196	202	329	126	103.36 (5)	13,070
Restaurants	23	24	39	15	521.36 (6)	7,736
Industrial / Large Commercial	1	1	2	1	2,450.00 (7)	1,581
Total	3,277		5,497	2,114		40,821

NOTES:

(1) Planning Commission Draft Executive Summary.
(2) Planning Commission Draft Executive Summary.
(3) 1997 Transportation System Master Plan.
(4) Trip Generation
(5) Assumed average size 4,000 square foot space with average trip generation of specialty retail & general office.
(6) Assumed average size 4,000 square foot space, high turnover sit-down restaurant.
(7) Assumed 700 employees * 3.5 trips per day per employee.

Under the second approach, pieces of information supplied independently in the 1997 Transportation System Plan and by the Oregon Department of Transportation (ODOT) were

combined to estimate average daily trip ends within the City. Briefly, in 1997, the Plan estimated a total of 174,000 average daily trip miles in the City. At an average trip length of 5.7 miles, an ODOT estimate for a comparable community, this converts to 30,526 average daily trips and 61,053 average daily trip ends. These totals were then grown consistent with projected population growth to the end of the planning period – forecasted to be at buildout population of 15,600. For example, The derivation of growth in ADTEs under this approach is summarized below in Table VI-2.

Table VI-2
Transportation SDC Capacity Basis #2

Method 2

	1997	2000	End of Period	Growth
Population	9,060 (1)	9,600 (2)	15,600 (3)	6,000
Average Daily Trip Miles (4)	174,000	184,371	299,603	115,232
Average Trip Length (miles) (5)	5.7	5.7	5.7	-
Average Daily Trips	30,526	32,346	52,562	20,216
Average Daily Trip Ends	61,053	64,692	105,124	**40,432**

NOTES:

(1) 1997 Transportation System Master Plan.
(2) Planning Commission Draft Executive Summary.
(3) Planning Commission Draft Executive Summary.
(4) 1997 Transportation System Master Plan.
(5) ODOT. Comparable data from McMinnville.

The conservatively higher of the two results, 40,821 ADTEs, was used in the SDC calculations because it results in lower fees.

B. Reimbursement Fee Calculation

We do not recommend that the City adopt a reimbursement fee for the transportation service, because we could not reasonably identify a valid cost basis. More specifically, there are two reasons for this determination. First, the City does not have asset cost records for the transportation infrastructure. Second, construction of the transportation system has been funded through gas tax revenues and a variety of other general tax sources. It would be very difficult, if not impossible, to argue that the owner of a developing property had not already paid for a share of the transportation system through these general taxes.

In the future, with adequate asset records showing facilities that have been funded by SDC receipts, it will be possible to establish a reimbursement fee cost basis. The model has been constructed to allow for such a calculation.

C. Improvement Fee Calculation

The following approach was taken to determine the cost of capacity-increasing capital improvements, the numerator in the improvement fee calculation, and calculate the fee.

- With the assistance of MSA, City staff compiled a list of needed capital projects using the Transportation System Plan, the current public facilities plan, and staff expertise. The sum of this list of project costs was $32,041,726.
- City staff and the project team then allocated a portion of the cost of each capacity-increasing project to the improvement fee cost basis depending upon the type and use of the project. The sum of this list of capacity-increasing project costs, the gross improvement fee cost basis, was $13,845,732.
- Next, the current transportation SDC improvement fee fund balance, $765,046, was deducted from the gross improvement fee cost basis to (1) recognize that the fund balance is available for spending on the project list and (2) prevent new customers from paying for those project costs twice. This result, $13,080,686, was the improvement fee cost basis.
- The improvement fee was then calculated as the improvement fee cost basis divided by growth in ADTEs as an estimate of forecasted growth in system capacity. The result of this calculation was an improvement fee of $320.44 per average daily trip end.

D. Recommended System Development Charge

The recommended transportation SDC is the sum of the reimbursement fee ($0 as recommended in this section) and the improvement fee, adjusted by an administrative cost recovery factor of 0.58%. As noted previously, the administrative cost recovery factor was derived by dividing annual SDC program accounting and administrative costs, including the amortized cost of this study, by forecasted annual SDC revenues for all services. The resulting recommended SDC is provided in Table VI-3 below.

Table VI-3
Recommended Transportation SDC

Unit Description	Reimbursement Fee	Improvement Fee	Administrative Cost Recovery	System Development Charge
Average Daily Trip Ends	$0.00	$320.44	$1.85	$322

A developing "typical" single family residence would pay a transportation SDC of $3,084 under this approach. Sample charges for that and other common customer types are provided in Table VI-4 below.

Table VI-4
Sample Transportation SDCs for Individual Customers

Customer Type	Estimated Daily Trips (1)	SDC	Basis
1 SFR	9.57 per DU	$3,084	per DU
2 Apartments	6.63 per DU	$2,137	per DU
3 General Office Bldg.	11.01 per 1,000 sq. ft.	$3,549	per 1,000 sq. ft.
4 Specialty Retail	40.67 per 1,000 sq. ft.	$13,108	per 1,000 sq. ft.
5 Supermarket	111.51 per 1,000 sq. ft.	$35,940	per 1,000 sq. ft.
6 Light Industry	6.97 per 1,000 sq. ft.	$2,246	per 1,000 sq. ft.
7 Heavy Industry	1.5 per 1,000 sq. ft.	$483	per 1,000 sq. ft.

(1) Source: Trip Generation, 6th Edition, Institute of Traffic Engineers

VII. Parks

The City's existing practice is to charge new development a parks SDC of $564 per dwelling unit. The proposed system development charge was calculated using this approach, with the addition of a distinction between the charges for single family dwelling units and multi-family dwelling units based on the differences in average number of occupants.

The calculation of the proposed SDC is summarized below and provided in detail in Appendix A.

A. Capacity Basis

Population projections in the March 26, 1999 Planning Commission Draft Executive Summary provided the information needed by the project team for this section. Assuming a current (2000) population of 9,600 and a buildout population of 15,600, growth of 6,000 residents can be anticipated. The following breakdown of assumed dwelling unit (DU) densities and the resulting allocation of growth, shown in Table VII below, was derived from information supplied in the Planning Commission document.

Table V-1
Parks SDC Capacity Basis

	Assumed DU Growth Pattern (1)	Assumed DU Densities	Growth Allocation
Dwelling Units			
Mobile Homes	5%	2.10	252
MFR Units	15%	2.10	756
Low-cost SFR	30%	2.60	1,872
Moderate-cost SFR	40%	2.60	2,496
High-cost SFR	10%	2.60	624
Total	2,400	2.50	6,000

NOTES:

(1) Planning Commission Draft Executive Summary.

B. Reimbursement Fee Calculation

For the reimbursement fee, a similar issue exists with the parks service as did with transportation. In most cases, parks have been either donated or acquired and constructed using general tax money, with property tax revenues as the primary source. So, a developing property has paid for a share of existing parks through property taxes on their undeveloped land and could argue that a full reimbursement fee would represent a double charge for existing parks. In order to recognize this factor, we examined the difference between the assessed valuation of land and the assessed valuation of improvements, under

the assumption that undeveloped land has paid less in property taxes and so a smaller share of existing parks facilities. In fiscal year 1999-2000, the assessed value of land in the City was $104,122,800 while the assessed value of improvements was $401,305,080. Stated differently, the assessed value of improvements made up 79.4% of the total assessed value of land and improvements in the City of St. Helens. We applied this percentage to the "unused capacity" portion identified in existing parks. In order to estimate the cost of unused capacity in the existing parks system, the numerator in the reimbursement fee calculation, and calculate the fee, the following approach was taken.

Using a detail of City parks and their respective costs from the 1999 Parks Master Plan, a list of City-paid costs was compiled and adjusted as follows:

- Past contributions in aid of construction, $0 at the time of the study, were deducted;
- Applicable net debt principal outstanding, $0 at the time of the study, was deducted.

- The project team evaluated each existing park, first for its capacity relevance, second for the amount of unused capacity present, and finally, for whether or not a portion of its cost would be recoverable in the fee. Only the Waterfront Park was found to have *recoverable* unused capacity. The amount of that recoverable unused capacity was determined in two steps. First, approximately thirty-eight percent of the costs were allocated to the reimbursement fee cost basis using the following rationale: of the ultimate projected system capacity (population 15,600), 6,000 "residents" of capacity, or 38.46%, is currently available to serve growth, with the remainder available for the existing population. Second, in order to determine the portion of unused capacity that was recoverable, we applied the 79.4% factor to recognize that undeveloped land had paid for 20.6% of the park through property taxes. This adjusted cost, $70,238, became the reimbursement fee cost basis.
- The reimbursement fee was then calculated as the reimbursement fee cost basis divided by the forecasted growth in population to buildout. The result of this calculation was a reimbursement fee of $11.71 per person, applied to residents only.

C. Improvement Fee Calculation

The City's parks planning standards are to provide 7 acres of parks for every 1,000 residents, and a park within one-half mile of all residences within residential zones. The development of an improvement fee cost basis was complicated by the fact that while the City is clearly meeting its parks standards in some parts of the City, it is deficient in other areas of the City. The cost of correcting existing "deficiencies" must be excluded from the improvement fee cost basis. Additionally, while the City had a detailed list of capacity-increasing improvements needed for existing parks, the City did not have a list of specific new parks that would satisfy its parks standards. Accordingly, City staff identified four areas of the City in which parks are needed to meet existing deficiencies and provide for forecasted growth in the area.

1. The area ½ mile west of McBride School and along Sykes Road.
2. The area ¼ mile north near Hankey Road.
3. The area between Millard and Maple Roads, just west of Division.

4. The area just east of Highway 30 and Achilles Road.

The capacity-increasing portions of the new parks required to serve these areas as well as the capacity-increasing portions of improvements to existing parks composed the improvement fee cost basis. The following approach was taken to determine the cost of capacity-increasing capital improvements, the numerator in the improvement fee calculation, and calculate the fee.

- With the assistance of the project team, City staff compiled a list of needed new parks by area and a list of improvements to existing parks, using the Parks Master Plan and staff expertise. The sum of this list of project costs was $5,301,000.
- City staff and the project team then allocated a portion of the cost of each capacity-increasing project to the improvement fee cost basis depending upon the type and use of the project. The sum of this list of capacity-increasing project costs, the gross improvement fee cost basis, was $2,222,905.
- Next, the current parks SDC improvement fee fund balance, $425,925, was deducted from the gross improvement fee cost basis to (1) recognize that the fund balance is available for spending on the project list and (2) prevent new customers from paying for those project costs twice. This result, $1,796,980, was the improvement fee cost basis.
- The improvement fee was then calculated as the improvement fee cost basis divided by the forecasted growth in population to buildout. The result of this calculation was an improvement fee of $299.50 per person, applied to residents only

D. Recommended System Development Charge

The recommended parks SDC is the sum of the reimbursement fee and the improvement fee, adjusted by an administrative cost recovery factor of 0.58%. As noted previously, the administrative cost recovery factor was derived by dividing annual SDC program accounting and administrative costs, including the amortized cost of this study, by forecasted annual SDC revenues for all services. Shown in Table VII-2 below, this calculation results in an SDC unit cost of $313 per person, to be applied to residents only – not businesses. Actual charges would be applied as shown in Table VII-3 below.

Table VII-2
Parks SDC Unit Cost

Unit Description	Reimbursement Fee	Improvement Fee	Administrative Cost Recovery	System Development Charge
Per person	$11.71	$299.50	$1.80	$313

Table VII-3
Recommended Parks SDC

Customer Type	Assumed Density	SDC
Single Family Residences	2.6	$814 per Dwelling Unit
Multi-family Residences	2.1	$657 per Dwelling Unit
Mobile Homes	2.1	$657 per Dwelling Unit

VIII. Conclusion

The City of St. Helens proposed system development charges, to be paid by new development at permitting, are shown in Table VIII-1 below:

Table VIII-1
Proposed SDCs

Service	Existing SDC	Proposed SDC	Basis
Water	**$1,131.00**	**$2,530.00**	per Equivalent Residential Unit
Wastewater	**$903.00**	**$1,271.00**	per Equivalent Residential Unit
Stormwater	**$90.50**	**$230.00**	per 1,000 Square Feet of Impervious Area
Transportation	**$60.71**	**$322.00**	per Daily Trip End
Parks	**$564.00**	**$814.00** **$657.00**	per Single Family Dwelling Unit per Multi-family Dwelling Unit

For informational purposes, the SDC calculation for a "typical" single family residence under the proposed charges is provided in Table VIII-2 below. Actual charges may vary depending upon the characteristics of the individual residence.

Table VIII-2
Sample Residential SDC

Sample SDC for a New Single Family Residence

Service	Number of Units			SDC		Total Charge
Water	1	equivalent residential unit	X	$ 2,530	=	$ 2,530
Wastewater	1	equivalent residential unit	X	1,271	=	1,271
Stormwater	2.5	1,000 sq. ft. of impervious	X	230	=	575
Transportation	9.57	average daily trips	X	322	=	3,082
Parks	1	single family dwelling unit	X	814	=	814
						$ 8,272

Appendix A

Technical Analysis

City of St. Helens
SDC Study
SDC Calculation: Water

Table 1

Reimbursement Fee	Cost Basis	Unit Basis: Accounts	Unit Basis: ERUs
Net Cost Unused Capacity	$ 4,930,942		
Growth to End of Planning Period		2,714	4,292
Reimbursement Fee		$ 1,817	$ 1,149
Improvement Fee			
Capacity Expanding CIP:	$ 5,862,692		
Growth to End of Planning Period		2,714	4,292
Improvement Fee		$ 2,160	$ 1,366
Total System Development Charge			
Reimbursement Fee		$ 1,817	$ 1,149
Improvement Fee (Base)		$ 2,160	$ 1,366
SDC Subtotal		$ 3,977	$ 2,515
plus: Administrative Cost Recovery [0.58%]		$ 23	$ 15
Total Base SDC		**$4,000** per account	**$2,530** per ERU

City of St. Helens
SDC Study
Customer Data Compilation: Water

Table 2

Customer Class	1999 # of Accounts (2)	Estimates (1) Annual Usage in MG (3)	Estimates (1) # of ERUs (4)	Current Conditions (1) # of Accounts	Current Conditions (1) # of ERUs (4)	End of Period (1) # of Accounts	End of Period (1) # of ERUs (4)	Net Growth # of Accounts	Net Growth # of ERUs (4)
Residential									
Single Family Residential	2,378			2,455		4,301		1,847	
Residential – Seniors	447			461		809		347	
Residential – Outside	194			200		351		151	
Multi-Family Residential									
Duplex	142			147		257		110	
Apartments	90			93		163		70	
Commercial									
Small Commercial	196			202		355		152	
Small Commercial – Outside	-			-		-		-	
Restaurants	23			24		42		18	
Industrial / Large Commercial	23			24		42		18	
Over 100,000 cf	9								
Wholesale	2			2		4		2	
Total	**3,504**	**464**	**5,527**	**3,608**	**5,705**	**6,322**	**9,998**	**2,714**	**4,292**

NOTES:

	#	year	
(1) Past (base) Population:	9,300	1999	
Current Population (est.):	9,600	2000	
Future Population (est.):	16,822		from 1993 Master Plan.

(2) Account information provided by Black & Veatch.

(3) Usage information estimated from water production summary. Includes deduction of estimated loss factor of 41% calculated in workspace below as difference between minimum water production month & minimum wastewater influent month.

(4) One ERU = 230 gallons per day (per City staff)

City of St. Helens
SDC Study
Existing Infrastructure Costs: Water

Table 3

Choose Existing Asset Method: 1 (1 = Method 1, 2 = Method 2)

Method 1: Original Cost

Utility Plant-in-Service (3/03/00) (1)	Original Cost	Noncapacity Related	Capacity Related	Unused Capacity	Used Capacity
Land	$153,301	$0	$153,301	**$0**	$153,301
Building and improvements	$157,725	$0	$157,725	**$0**	$157,725
Machinery and equipment	$733,338	$0	$733,338	**$0**	$733,338
Utility plant and systems (2)	$1,627,794	$0	$1,627,794	**$14,681**	$1,613,114
Transmission & Distribution Mains (2)	$8,266,376	$0	$8,266,376	**$3,548,910**	$4,717,466
Mapping/Plans	$195,815	$0	$195,815	**$0**	$195,815
Construction work in progress (3)	$1,820,000	$0	$1,820,000	**$1,820,000**	$0
less: Net Utility Debt Principal Outstanding (4)	$0	$0	$0	**$0**	$0
less: Grant Contributions (5)	$1,414,290	$0	$1,414,290	**$452,649**	$961,641
Allocable Plant-in-Service	$11,540,059	$0	$11,540,059	**$4,930,942**	$6,609,117

Method 2: Replacement Cost less Depreciation

	Replacement Cost (6)	Noncapacity Related	Capacity Related	Unused Capacity	Used Capacity
Allocable Plant-in-Service	$ 22,472,723				
less: Accumulated Depreciation (7)	$ 5,170,993				
plus: Construction Work in Progress	$1,820,000				
Net Replacement Plant-in-Service	$19,121,730	$0	$19,121,730	$8,170,507	$10,951,223

NOTES:

(1) Source: "Asset Master List by Fund," FA3009, City of St. Helens.
(2) Reflects assumption that Lamont Street pump station and T & D mains are sized to accommodate the population at end of planning period.
(3) Includes Ranney Collector #3.
(4) Rate portion only; net of cash and investments.
(5) Non-SDC contributed capital, as listed in 1999 Financial Statement p. 48. Represents constructed assets funded by federal and state grants only; no contributions were made by developers.
(6) Engineering News Record, Construction Cost Index, March 27, 2000.
(7) As per 1999 Financial Statements, p. 17.

City of St. Helens
SDC Study
Project List: Water

able 4

#	Project Source	Year	'99 PFP Priority	Project Description	Capacity	Extra (1) Capacity	Replacing	1993 Project Cost (2)	2000 Project Cost (3)	SDC Eligible Cost (4)
B	MP/PFP	2000-01	2	High Level Reservoir	0.5 mg	0.2 mg	new	$ -	$ 750,000	$ 300,000
C	MP	2000-02		12-inch main on Gable Rd. from Hwy 30 to High School	12-inch	4-inch	8-inch	-	30,000	16,667
D	MP	2000-02		12-inch main on Gable Rd. along High School	12-inch	4-inch	6-inch	-	120,000	66,667
E	MP/PFP	2000-09	3	Steel Mains Replacement				-	3,000,000	-
F	MP	2002-05		10-inch main to the junior high school from West St.	10-inch	2-inch	6-inch	87,000	105,331	37,919
G	MP	2002-05		8-inch parallel main on Pittsburg Road to serve upper level areas near Novella Ave.	8-inch	-	6-inch	116,000	140,441	-
H	MP/PFP	2002-05	4	20-inch transmission main from new reservoir to Columbia Blvd. (base level)	20-inch	12-inch	new	-	1,325,000	-
I	MP/PFP	2002-05	5	Base Level Reservoir	3.5 mg	3.2 mg	new	-	2,230,000	2,038,857
J	MP/PFP	2002-05	6	Rehabilitation of Ranney Collectors #1 and #2 (6)	2.5 mgd	1.9 mgd		-	300,000	228,000
K	MP/PFP	2003-06	7	Water Treatment Plant	5.0 mgd	1.5 mgd	new	-	4,938,000	1,481,400
L	PFP	2002-20	8	12" waterline loop - Millard/Old Portland to McNulty Creek	12-inch	4-inch	new	-	160,000	88,889
M	PFP	2002-20	9	12" line, Hwy 30/Millard Rd. to Ross Rd.	12-inch	4-inch	new	-	430,000	238,889
N	PFP	2002-20	10	12" line, Ross Rd./Millard to Bachelor Flat Rd.	12-inch	4-inch	new	-	260,000	144,444
O	PFP	2002-20	11	12" line, Bachelor Flat Rd. from Gable Rd. to Ross Rd.	12-inch	4-inch	new	-	120,000	66,667
P	PFP	2002-20	12	Old Portland Road 10" waterline spur to UGB	10-inch	2-inch	6-inch	-	125,000	45,000
Q	PFP	2002-20	13	12" line, Bayport well to Achilles Rd./Hwy 30, west to Fischer, north to Millard	12-inch	4-inch	new	-	530,000	294,444
R	MP/PFP	2002-20	14	Base Level Reservoir (6)	3.5 mg	0.9 mg	new	-	2,000,000	514,286
S	MP/PFP	2002-20	15	Water Treatment Plant Upgrade (6)	2.5 mgd	1.9 mgd	new	-	1,350,000	1,026,000
T	MP	2002-20		Lemont Street Pump Station & Modification of Existing 14-inch Pump Main (to High Service Level)	0.36 mgd	0.12 mgd	new	-	224,000	74,667
										$6,662,795
Total								$203,000	$18,137,772	$6,662,795
lus: SDC Credits Outstanding										$0
ss: Current Improvement Fee Fund Balance (5)										$800,103
otal Improvement Fee-Eligible Costs										$5,862,692

NOTES:

(1) All pipes over 8 inches are assumed to be oversized for growth.
(2) 1993 project costs from City of St. Helens Water System Master Plan.
(3) 2000 project costs from City of St. Helens budgeted Public Facilities Plan (1999) or derived from an ENR CCI ration of May 2000 to July 1993.
(4) Oversize costs are based on prorated oversize flow capacities listed.
(5) Source: City staff.
(6) The oversize capacity of this project has been prorated to reflect the capacity of the project that will be used in the planning period. Additional capacity is available for future cost recovery beyond the planning period.

City of St. Helens
SDC Study
SDC Calculation: Sanitary Sewer

Table 1

Reimbursement Fee	Cost Basis	Unit Basis: Accounts	Unit Basis: ERUs
Net Cost of Unused Capacity	$ 2,404,194		
Growth to End of Planning Period		3,616	5,271
Reimbursement Fee		$ 665	$ 456
Improvement Fee			
Capacity Expanding CIP	$ 4,257,035		
Growth to End of Planning Period		3,616	5,271
Improvement Fee		$ 1,177	$ 808
Total System Development Charge			
Reimbursement Fee		$ 665	$ 456
Improvement Fee		$ 1,177	$ 808
SDC Subtotal		$ 1,842	$ 1,264
plus: Administrative Cost Recovery	0.58%	$ 11	$ 7
Total SDC		**$1,853** per account	**$1,271** per ERU

City of St. Helens
SDC Study
Customer Data Compilation: Sanitary Sewer

ible 2

Customer Class	1999 # of Accounts (2)	Estimates (1) Annual Usage in MG (3)	Estimates (1) # of ERUs (4)	Current Conditions (1) # of Accounts	Current Conditions (1) # of ERUs (4)	End of Period (1) # of Accounts	End of Period (1) # of ERUs (4)	Net Growth # of Accounts	Net Growth # of ERUs (4)
Residential									
Single Family Residential	2,742			2,830		5,917		3,086	
Residential – Outside	-			-		-		-	
Multi-Family Residential									
Duplex	135			139		291		152	
Apartments	95			98		205		107	
Commercial									
Small Commercial	194			200		419		218	
Restaurants	23			24		50		26	
Large Commercial	1			1		2		1	
Hotel / Motel	2			2		4		2	
Two Sewers	3			3		6		3	
Industrial	16			17		35		18	
Boise Cascade – Outside	1			1		2		1	
Wholesale	1			1		2		1	
Total	**3,213**	**378**	**4,683**	**3,317**	**4,834**	**6,933**	**10,105**	**3,616**	**5,271**

NOTES:

	#	year	
(1) Past (base) Population:	9,300	1999	
Current Population (est.):	9,600	2000	
Future Population (est.):	20,067		from 1979 Master Plan.

(2) Account information provided by Black & Veatch.

(3) Usage information provided by City staff from primary influent records at treatment plant (excluding Boise Cascade).
Dry weather flow (9/99) = 31.48 million gallons, annualized to exclude infiltration and inflow.

(4) One ERU = 221 gallons per day (900 cf / month)

City of St. Helens
SDC Study
Existing Infrastructure Costs: Sanitary Sewer

Table 3

Choose Existing Asset Method: [1] (1 = Method 1, 2 = Method 2)

Method 1: Original Cost

Utility Plant-in-Service (3/03/00) (1)	Original Cost	Noncapacity Related	Capacity Related	**Unused Capacity**	Used Capacity
Land	$50,162	$0	$50,162	**$0**	$50,162
Building and improvements	$23,093	$0	$23,093	**$0**	$23,093
Machinery and equipment	$647,304	$0	$647,304	**$0**	$647,304
Utility plants and systems	$7,370,471	$0	$7,370,471	**$3,844,457**	$3,526,014
Collection Mains	$582,895	$0	$582,895	**$0**	$582,895
Construction work in progress	$0	$0	$0	**$0**	$0
less: Net Utility Debt Principal Outstanding (2)	$269,884	$0	$269,884	**$119,618**	$150,266
less: Grant Contributions (3, 4)	$2,979,660	$0	$2,979,660	**$1,320,645**	$1,659,015
Allocable Plant-in-Service	$5,424,380	$0	$5,424,380	**$2,404,194**	$3,020,186

Method 2: Replacement Cost less Depreciation

	Replacement Cost	Noncapacity Related	Capacity Related	**Unused Capacity**	Used Capacity
Allocable Plant-in-Service	$ 16,677,161				
less: Accumulated Depreciation (3, 5)	$ 2,958,312				
plus: Construction Work in Progress	$ -				
Net Replacement Plant-in-Service	$ 13,718,849	$ -	$ 13,718,849	**$ 6,080,469**	$ 7,638,380

NOTES:

(1) Source: "Asset Master List by Fund," FA3009, City of St. Helens.
(2) Rate portion only; net of cash and investments. As per 1999 Financial Statement, p. 19.
Oregon Economic Development Department (OEDD) [$ 269,884]
(3) "Sewer - Enterprise Fund," as listed in Financial Statements, includes both the Sewer Fund and the Stormwater Fund.
Proportion that is Sewer: [83%] (based on the original costs of existing assets for the two utilities).
Grant Contributions and Accumulated Depreciation is allocated between Sewer and Stormwater based on this percentage.
(4) Non-SDC contributed capital, as listed in 1999 Financial Statement p. 55. Represents constructed assets funded by federal and state grants only; no contributions were made by developers.
(5) As per 1999 Financial Statements, p. 17.

City of St. Helens
SDC Study
Project List: Sanitary Sewer

Table 4

#	Project Source	Year	'99 PFP Priority	Project Description	Capacity	Extra (2) Capacity	Replacing	Planned Project Cost (3)(4)	2000 Project Cost (5)	SDC Eligible Cost (6)
A	PFP	2000-04	1	Study for West McNulty Creek Area (Hwy. 30 to Ross Rd.)		100%		$ -	$ 50,000	$ 50,000
B	PFP	2000-04	2	Railroad Avenue and Pump Station		0%		-	420,000	-
C	PFP	2000-04	5	Clark Street to Pump Station		0%		-	85,000	-
D	PFP	2000-04	6	McNulty Creek Industrial area and 9th St. Parallel to Old Portland Rd.	8-inch	0%		-	315,000	-
E	PFP	2000-04	7	Hwy. 30 (Gable Rd. to Millard Rd.) and Pump Station		20%		-	235,000	47,000
F	Staff	2001		Head works upgrade	pop. 20,067	50%		-	200,000	100,000
G	Staff	2000-04		Stormwater separation and INI reduction		0%		-	2,750,000	-
H	Staff	2000-04		Main Replacement		0%		-	750,000	-
I	PFP	2005-09	8	Gray Cliff area to Pump Station	8-inch	0%		-	195,000	-
J	PFP	2005-09	9	Old Portland Rd. from Letica to Bayport to McNulty Creek Pump Station	8-inch	0%		-	732,000	-
K	PFP	2005-09	10	Bachelor Flat Rd., Ross to Fairgrounds	8-inch	0%		-	175,000	-
L	Staff	2005-10		Main Replacement		0%		-	750,000	-
L	PFP	2010-20	12	Hwy. 30 north to Pittsburg to Deer Island Road	8-inch	0%		-	200,000	-
M	PFP	2010-20	13	Pittsburg Rd. from Reservoir to North Vernonia Road	8-inch	0%		-	190,000	-
N	PFP	2010-20	14	Achilles (Urban Growth Boundary [west] to Old Portland Rd.)	8-inch	0%		-	300,000	-
O	MP	2000-20		McNulty Creek Trunk Phase I	30-inch	22-inch	new	320,000	636,014	617,275
P	MP	2000-20		Highway 30 Trunk	10-inch	2-inch	new	378,000	751,292	336,922
Q	MP	2000-20		Bayview Pump Station and Force Main	1.62 mgd	1.34 mgd	new	258,000	512,786	232,100
R	MP	2000-20		Gable Road Trunk	8-inch	0%	new	82,000	162,979	-
S	MP	2000-20		Vernonia Road Trunk Phase I	10-inch	2-inch	new	246,000	488,936	219,266
T	MP	2000-20		South Trunk Replacement	30-inch	22-inch	15-inch	1,310,000	2,603,683	2,526,968
U	MP	2000-20		McNulty Creek Trunk Phase II	21-inch	13-inch	new	174,000	345,833	319,456
V	MP	2000-20		Firlock Park Trunk	10-inch	2-inch	new	200,000	397,509	178,265
W	MP	2000-20		Sykes Road Trunk Extension	8-inch	0%	new	94,000	186,829	-
X	MP	2000-20		Vernonia Road Trunk Phase II	8-inch	0%	new	160,000	318,007	-
Y	MP	2000-20		McNulty Creek Trunk Phase III	18-inch	10-inch	new	105,000	208,692	184,683
Z	MP	2000-20		Aubuchon Trunk	8-inch	0%	new	158,000	314,032	-
AA	MP	2000-20		Old Portland Rd. Trunk	8-inch	0%	new	127,000	252,418	-
BB	MP	2000-20		Firtex Pump Station and Force Main	0.7 mgd	0.7 mgd	new	188,000	373,658	373,700
CC	MP	2000-20		Bayview Trunk	10-inch	2-inch	new	175,000	347,820	155,982
										$5,341,618
Total								$3,975,000	$15,247,487	$5,341,618
plus: SDC Credits Outstanding										$0
less: Current Improvement Fee Fund Balance (7)										$1,084,583
Total Future Capital Projects for SDC Calculation										$4,257,035

NOTES:

(1) MP = Master Plan, PFP = Public Facilities Plan
(2) All pipes over 8 inches are assumed to be oversized for growth.
(3) 1989 project costs from City of St. Helens Sewerage System Facilities Plan Update
(4) 1979 project costs from City of St. Helens Vicinity Sewer Facilities Plan
(5) 2000 project costs from City of St. Helens budgeted Public Facilities Plan (1999) or derived from an ENR CCI ratio of May 2000 to April 1989 or November 1979.
(6) Oversize costs are based on prorated oversize flow capacities listed.
(7) Source: City staff.

City of St. Helens
SDC Study
SDC Calculation: Stormwater

Table 1

Reimbursement Fee				
Cost of Net Unused Capacity		$	27,963	
Growth to End of Planning Period			47,522,862	Square Feet Impervious
Reimbursement Fee		$	0.0006	per Square Foot Impervious
Improvement Fee				
Capacity Expanding CIP		$	10,626,382	
Growth to End of Planning Period			47,522,862	Square Feet Impervious
Improvement Fee		$	0.22	per Square Foot Impervious
Total System Development Charge				
Reimbursement Fee		$	0.00	per Square Foot Impervious
Improvement Fee		$	0.22	per Square Foot Impervious
SDC Subtotal		$	0.22	per Square Foot Impervious
plus: Administrative Cost Recovery	0.58%		$0.00	per Square Foot Impervious
Total SDC per Impervious Square Foot			**$0.23**	per Square Foot Impervious

City of St. Helens
SDC Study
Customer Data Compilation: Stormwater (1)

ıble 2

City Zoning	County Zoning	Total Acres	Buildable Acres (2)	Wetland Acres	Existing Developed Acres	Roadway Acres	Existing + Roadway Acres	Percent Impervious	Existing Impervious (w/ Roads)	Buildable Impervious Acres	Buildable Impervious Sq. Ft.
Suburban Residential											
R-10		107.0	45.6	33.9	27.5	19.5	47.0				
	RSUR (3)	181.4	166.2	6.8	8.5	6.0	14.5				
		288.4	**211.8**	**40.7**	**36.0**	**25.5**	**61.5**	**38%**	**23.4**	**80.5**	**3,506,145**
General Residential											
R-7		392.0	221.6	30.0	140.4	99.6	240.0				
RP		19.0	13.9	5.1	-	-	-				
R-5		284.0	55.7	24.8	203.5	144.4	347.9				
	RSUR (3)	911.6	835.1	33.9	42.5	30.2	72.7				
	UGR	15.0	8.9	6.1	-	-	-				
		1,621.6	**1,135.2**	**99.9**	**386.4**	**274.2**	**660.6**	**52%**	**343.5**	**590.3**	**25,713,284**
Intense Residential											
A-5		85.5	26.4	4.7	54.4	38.6	93.0				
	UMFR	30.0	5.2	6.3	18.5	13.1	31.6				
MHR		33.0	12.0	-	21.0	14.9	35.9				
	MHR	84.0	36.4	2.6	45.0	31.9	76.9				
		232.5	**80.0**	**13.6**	**138.9**	**98.5**	**237.4**	**65%**	**154.3**	**52.0**	**2,265,120**
Commercial											
HC		54.0	17.9	2.3	33.8	24.0	57.8				
	HC	38.0	12.0	-	26.0	18.5	44.5				
GC		100.0	14.0	2.0	84.0	59.6	143.6				
	GC	23.0	6.8	3.2	13.0	9.2	22.2				
RC		35.0	6.1	2.4	26.5	18.8	45.3				
MC		5.0	0.7	-	4.3	3.1	7.4				
		255.0	**57.5**	**9.9**	**187.6**	**133.2**	**320.8**	**85%**	**272.7**	**48.9**	**2,128,995**
ıdustrial											
LI		60.4	22.2	1.5	36.7	26.1	62.8				
	LI	95.0	52.5	1.5	41.0	29.1	70.1				
HI		621.0	200.0	327.0	94.0	66.7	160.7				
	HI	258.0	157.0	88.0	13.0	9.2	22.2				
		1,034.4	**431.7**	**418.0**	**184.7**	**131.1**	**315.8**	**72%**	**227.4**	**310.8**	**13,539,493**
Open Space											
PL		205.0	-	11.0	194.0	137.7	331.7				
	PL	86.0	79.3	5.7	1.0	0.7	1.7				
	UOS	42.0	5.6	36.4	-	-	-				
		333.0	**84.9**	**53.1**	**195.0**	**138.4**	**333.4**	**10%**	**33.3**	**8.5**	**369,824**
Roadway											
ROW		495.0	-	-	495.0	-	495.0				
	ROW	206.0	-	-	206.0	-	206.0				
ODOT		50.0	-	-	50.0	-	50.0				
	ODOT	50.0	-	-	50.0	-	50.0				
		801.0	**-**	**-**	**801.0**	**-**	**801.0**	**90%**	**-**	**-**	**-**
GRAND TOTAL		**4,566**	**2,001**	**635**	**1,930**	**801**	**2,731**	**55%**	**1,055**	**1,091**	**47,522,862**

Percent Impervious Buildable Area to Total Impervious Area in UGB = **51%**

NOTES:

(1) Source: MSA

(2) Demographics

	#	year
Current Population:	9,600	2000
Future Population:	15,600	from Planning Commission Executive Summary.

(3) RS/UR designated land scheduled for development by the following breakdown:
83.4% R-7; and 16.6% R-10.

City of St. Helens
SDC Study
Existing Infrastructure Costs: Stormwater

Table 3

Choose Existing Asset Method: 1 (1 = Method 1, 2 = Method 2)

Method 1: Original Cost

Utility Plant-in-Service (3/03/00) (1)	Original Cost	Noncapacity Related	Capacity Related	Unused Capacity	Used Capacity
Land	$0	$0	$0	$0	$0
Building and improvements	$0	$0	$0	$0	$0
Machinery and equipment	$135,116	$0	$135,116	$0	$135,116
Utility plant and systems (2)	$1,561,742	$0	$1,561,742	$343,583	$1,218,158
Mapping/Plan	$88,488	$0	$88,488	$0	$88,488
Construction work in progress	$0	$0	$0	$0	$0
less: Net Utility Debt Principal Outstanding (3)	$ 1,026,743	$0	$1,026,743	$197,593	$829,150
less: Grant Contributions (4,5)	$613,301	$0	$613,301	$118,027	$495,273
Allocable Plant-in-Service	$145,302	$0	$145,302	$27,963	$117,339

Method 2: Replacement Cost less Depreciation

	Replacement Cost	Noncapacity Related	Capacity Related	Unused Capacity	Used Capacity
Allocable Plant-in-Service	$3,103,431				
less: Accumulated Depreciation (4)	$608,907				
plus: Construction Work in Progress	$0				
Net Replacement Plant-in-Service	$2,494,524	$0	$2,494,524	$480,062	$2,014,462

NOTES:

(1) Source: "Asset Master List by Fund," FA3009, City of St. Helens.
(2) Unused capacity in existing system: 22% per MSA; capacity available for 25-year storm at buildout.
(3) Rate portion only; net of cash and investments.
Oregon Department of Environmental Quality: $ 1,026,743
(4) "Sewer - Enterprise Fund," as listed in Financial Statements, includes both the Sewer Fund and the Stormwater Fund.
Portion that is stormwater: 17% (based on the original costs of existing assets for the two utilities).
Grant Contributions and Accumulated Depreciation are allocated between Sewer and Stormwater based on this percentage.
(5) Non-SDC contributed capital, as listed in 1999 Financial Statement p. 55. Represents constructed assets funded by federal and state grants only; no contributions were made by developers.
(6) As per 1999 Financial Statements, p. 17.

City of St. Helens
SDC Study
Project List: Stormwater

able 4

#	Project Source (1)	Year	'99 PFP Priority	Project Description	Capacity	Extra (2) Capacity	Replacing	1999 Project Cost	2000 Project Cost (3)	SDC Eligible Cost (4)
A	PFP/MP	1999-04	1	Middle Trunk bypass at 15th St. north of Plymouth St. and downstream culverts		51%			$ 471,000	$ 240,210
B	PFP/MP	1999-04	2	Middle/North Trunk outlet northeast of 4th St./Columbia Blvd. to the Columbia River discharge. Includes upgrade of 2nd St. culvert south of West St. and its associated downstream piping		51%			1,016,000	518,160
C	PFP/MP	1999-04	3	Upgrade existing Middle Trunk piping from 15th St. to 4th St.		51%			1,316,000	671,160
D	PFP/MP	2005-09	4	Upgrade existing undersized piping in Columbia Blvd. west of Milton Creek to Cherrywood Dr. including re-routing Vernonia Rd. flows down Michael Ave. to Milton Creek		51%			1,664,000	848,640
E	PFP/MP	2005-09	5	Upgrade existing undersized culverts in the North Trunk Canyon at 12th St., 8th St., from 7th St. to 6th St. and from 5th St. to the east side of 4th St.		51%			324,000	165,240
F	PFP/MP	2005-09	6	Upgrade existing undersized culvert and piping system extending from U.S. 30 east to 8th St. along Lemont St.		51%			1,126,000	574,260
G	PFP/MP	2005-09	7	Upgrade existing undersized piping on 4th St. roughly between Cowlitz St. and St. Helens St. and the system outlet on Cowlitz St. near The Strand		51%			238,000	121,380
H	PFP/MP	2010-2019	8	Upgrade existing undersized culverts located at the intersection of Gable Road and Old Portland Road and on Gable Road approximately 1400 feet east of U.S. 30		51%			214,000	109,140
I	PFP/MP	2010-2019	9	Upgrade existing undersized piping on Little St. NW of U.S. 30 to Milton Creek discharge.		51%			135,000	68,850
J	PFP/MP	2010-2019	10	Upgrade existing undersized piping on Sunset Blvd. from Crescent Dr. to Columbia Blvd.		51%			322,000	164,220
K	PFP/MP	2010-2019	11	Upgrade existing undersized piping extending from Cowlitz St. to Tualatin St. along 20th-19th Streets.		51%			678,000	345,780
	PFP/MP	2010-2019	12	Upgrade existing undersized piping extending from Cowlitz St. to the Middle Trunk system on 13th St. & 14th St.		51%			402,000	205,020
L	PFP/MP	2010-2019	13	Upgrade existing undersized system extending from 11th St. to 5th St. between West St. and Wyeth St.		51%			654,000	333,540
M	PFP/MP	2010-2019	14	Upgrade existing system outlet at Sykes Road and U.S. 30		51%			337,000	171,870
N	PFP/MP	2010-2019	15	Upgrade existing pipe from 20th St. to Milton Creek along Crouse Wy.		51%			356,000	181,560
O	PFP/MP	2010-2019	16	Upgrade existing undersized piping along Tualatin St. from 19th St. to McNulty Creek and Dubois Ln. from 20th St. to Melvin Ave. Reroute Dubois Ln. flows to Tualatin St. outfall.		51%			337,000	171,870
P	PFP/MP	2010-2019	17	Construct a new storm line from Wagner Ave. extending down Shore Dr. approximately 750 feet to existing outfall		51%			311,000	158,610
Q	PFP/MP	2010-2019	18	Upgrade existing undersized culverts North of Columbia Blvd. at McMichael St. and at Allendale Dr.		51%			145,000	73,950
R	PFP/MP	2010-2019	19	Upgrade existing undersized culvert and piping system extending from 3rd St. to 8th St. along Lemont St. and from 7th St. to Lemont St. along 8th St		51%			427,000	217,770
S	PFP/MP	2010-2019	20	Upgrade existing undersized piping extending from 14th St. N. of St. Helens to 16th St. S. of St. Helens. Upgrade existing piping from 16th St. south of St. Helens to 12th St. north of St. Helens. Connect the existing culvert S. of St. Helens at 15th St. to the improved system at 16th St.		51%			178,000	90,780
T	PFP/MP	2010-2019	21	Upgrade existing undersized piping along 16th St. north of Old Portland Rd. and culverts at 17th St. and Old Portland Rd.		51%			109,000	55,590
U	PFP/MP	2010-2019	22	Upgrade existing undersized piping on Gable Rd. and U.S. 30.		51%			201,000	102,510
V	PFP/MP	2010-2019	23	Construct a new storm line from McArthur St. to Milton Creek along Halsey St. Upgrade existing undersized piping on Nimitz St. from McArthur St. to Milton Creek and on Park St. from Vernonia Rd. to Milton Creek.		51%			307,000	156,570
W	PFP/MP	2010-2019	24	Upgrade existing undersized culverts at the Hinterlands Subdivision		51%			137,000	69,870
X	PFP/MP	2010-2019	25	Upgrade existing undersized piping SW of City sewage lagoons at Boise Cascade site		51%			1,206,000	615,060
Y	PFP/MP	2010-2019	26	Upgrade existing undersized piping north of Columbia Blvd. at 21st St. and 20th St.		51%			241,000	122,910
Z	PFP/MP	2010-2019	27	Upgrade existing undersized piping at Columbia Blvd. and 7th St. and extend new piping south down 7th St. to the Middle Trunk canyon outlet.		51%			155,000	79,050
AA	PFP/MP	2010-2019	28	Upgrade existing undersized piping along 1st St. and St. Helens St.		51%			101,000	51,510
BB	PFP/MP	2010-2019	29	Upgrade existing undersized piping on Columbia Blvd. from Bradley St. to Milton Creek.		51%			70,000	35,700
CC	PFP/MP			Install new conveyance facility from Pittsburg Rd. to the upstream end of the Lemont St. system.		51%			1,040,000	530,400
DD	PFP/MP			Install new conveyance facility along Vernonia Rd. south to Columbia Blvd.		51%			733,000	373,830
EE	PFP/MP			Install new conveyance facility along Sykes Rd. west of Columbia Blvd.		51%			572,000	291,720
FF	PFP/MP			Install new conveyance facility from U.S. 30 north of Kavanaugh St. to McNulty Cr. near Gable Rd.		51%			575,000	293,250
GG	PFP/MP			Install new conveyance facilities from Millard Rd. and Morse Rd. to Old Portland Rd. north of Millard Rd. Upgrade existing culverts and channels at the U.S. 30 crossing north of Millard Rd.		51%			1,018,000	519,180
HH	PFP/MP			Install new conveyance facilities along the southerly portion of Childs Rd. to McNulty Creek.		51%			242,000	123,420
II	PFP/MP			Install new conveyance facilities from Bachelor Flat Rd. south down Ross Rd. to McNulty Creek.		51%			903,000	460,530
JJ	PFP/MP			Install new conveyance facility from Morse Rd. to the Columbia River along Achilles Rd. Connect to existing 24-inch culvert across the Portland and Western Railroad.		51%			1,205,000	614,550
KK	PFP/MP			Install new conveyance system from Morse Rd. to Old Portland Rd. between Achilles Rd. and Millard Rd. Includes improving existing 18-inch culvert across the Portland and Western Railroad.		51%			1,464,000	746,640
LL	PFP/MP			Install new conveyance facility south of Millard Rd. extending from Fischer Rd. to the easterly side of the Portland and Western Railroad and continuing south. Includes improving existing 15-inch culvert across the Portland and Western Railroad and tie-in to existing 24-inch culvert.		51%			421,000	214,710
									-	-
										$10,889,010
Total								$0	$21,351,000	$10,889,010
plus: SDC Credits Outstanding										$0
less: Current Improvement Fee Fund Balance (5)										$262,628
Total Future Capital Projects for SDC Calculation										$10,626,382

NOTES:

(1) MP = Master Plan, PFP = Public Facilities Plan
(2) Oversize capacities are based on the ratio of impervious buildable area to total impervious area in the Urban Growth Boundary (see Table 2).
(3) 2000 project costs from City of St. Helens budgeted Public Facilities Plan and City of St. Helens Stormwater Master Plan.
(4) Oversize costs are based on prorated oversize capacities listed.
(5) Source: City staff.

City of St. Helens
SDC Study
SDC Calculation: Transportation

Table 1

Reimbursement Fee

Cost of Net Unused Capacity	$	-	
Growth to End of Planning Period		40,821	Average Daily Trip Ends
Reimbursement Fee	$	-	per ADTE

Improvement Fee

Capacity Expanding CIP	$	13,080,686	
Growth to End of Planning Period		40,821	Average Daily Trip Ends
Improvement Fee	$	320.44	per ADTE

Total System Development Charge

Reimbursement Fee		$	-	per ADTE
Improvement Fee		$	320.44	per ADTE
SDC Subtotal		$	320.44	per ADTE
plus: Administrative Cost Recovery	0.58%		$1.85	per ADTE
Total SDC			**$322**	per ADTE

Example SDCs

Customer Type	Estimated Daily Trips (1)	SDC	Basis
1 SFR	9.57 per DU	$3,084	per DU
2 Apartments	6.63 per DU	$2,137	per DU
3 General Office Bldg.	11.01 per 1,000 sq. ft.	$3,549	per 1,000 sq. ft.
4 Specialty Retail	40.67 per 1,000 sq. ft.	$13,108	per 1,000 sq. ft.
5 Supermarket	111.51 per 1,000 sq. ft.	$35,940	per 1,000 sq. ft.
6 Light Industry	6.97 per 1,000 sq. ft.	$2,246	per 1,000 sq. ft.
7 Heavy Industry	1.5 per 1,000 sq. ft.	$483	per 1,000 sq. ft.

(1) Source: Trip Generation, 6th Edition, Institute of Traffic Engineers

City of St. Helens
SDC Study
Customer Data Compilation: Transportation

Table 2a
Method 1

	1999	2000	End of Period	Growth	Assumed ADTEs/unit	Total ADTEs Growth
Population	9,300 (1)	9,600 (2)	15,600 (3)	6,000		
Developed Units (from Water)						
Single Family Residential	2,825	2,916	4,739	1,823	**9.57** (4)	17,442
Multi-Family Residential	232	239	389	150	**6.63** (4)	992
Commercial						
Small Commercial	196	202	329	126	**103.36** (5)	13,070
Restaurants	23	24	39	15	**521.36** (6)	7,736
Industrial / Large Commercial	1	1	2	1	**2,450.00** (7)	1,581
Total	3,277		5,497	2,114		**40,821**

NOTES:

(1) Planning Commission Draft Executive Summary.
(2) Planning Commission Draft Executive Summary.
(3) 1997 Transportation System Master Plan.
(4) Trip Generation
(5) Assumed average size 4,000 square foot space with average trip generation of specialty retail & general office.
(6) Assumed average size 4,000 square foot space, high turnover sit-down restaurant.
(7) Assumed 700 employees * 3.5 trips per day per employee.

City of St. Helens
SDC Study
Customer Data Compilation: Transportation

Table 2b
Method 2

	1997	2000	End of Period	Growth
Population	9,060 (1)	9,600 (2)	15,600 (3)	6,000
Average Daily Trip Miles (4)	174,000	184,371	299,603	115,232
Average Trip Length (miles) (5)	5.7	5.7	5.7	-
Average Daily Trips	30,526	32,346	52,562	20,216
Average Daily Trip Ends	61,053	64,692	105,124	**40,432**

NOTES:

(1) 1997 Transportation System Master Plan.
(2) Planning Commission Draft Executive Summary.
(3) Planning Commission Draft Executive Summary.
(4) 1997 Transportation System Master Plan.
(5) ODOT. Comparable data from McMinnville.

City of St. Helens
SDC Study
Existing Infrastructure Costs: Transportation

Table 3

Choose Existing Asset Method: 1 (1 = Method 1, 2 = Method 2)

Method 1: Original Cost

Utility Plant-in-Service	Original Cost	Noncapacity Related	Capacity Related	Unused Capacity	Used Capacity
Land	$0	$0	$0	$0	$0
Infrastructure	$0	$0	$0	$0	$0
Construction work in progress	$0	$0	$0	$0	$0
less: Net Debt Principal Outstanding	$0	$0	$0	$0	$0
less: Grant Contributions (1)	$0	$0	$0	$0	$0
Allocable Plant-in-Service	$0	$0	$0	$0	$0

Method 2: Replacement Cost less Depreciation

	Replacement Cost	Noncapacity Related	Capacity Related	Unused Capacity	Used Capacity
Allocable Plant-in-Service	$ -				
less: Accumulated Depreciation					
plus: Construction Work in Progress	$0				
Net Replacement Plant-in-Service	$0	$0	$0	$0	$0

NOTES:

(1) Non-SDC contributed capital

City of St. Helens
SDC Study
Project List: Transportation

Table 4

#	Project Source	Year	'99 PFP Priority	Project Description	Capacity in ADT	Extra Capacity in ADT	Replacing	1997 Project Cost (2)	2000 Project Cost (3)	SDC Eligible Cost (4)
A	PFP/MP	1999-04	1	Gable Rd. Reconstruction; Pedestrian and Bicycle Improvements (Hwy 30 to Bachelor Flat)	7600	4000	3600 ADT	$ 662,000	$ 703,008	$ 370,004
B	PFP/MP	1999-04	2	Sykes Rd. Reconstruction and Pedestrian Improvements (Columbia to City Limits)	2800	600	2200 ADT	365,000	387,610	83,059
C	PFP/MP	1999-04	3	Bachelor Flat Rd. Reconstruction: Pedestrian and Bicycle Improvements (Sykes to Ross)	7500	4600	2900 ADT	949,000	1,007,786	618,109
D	PFP/MP	1999-04	4	Add Bicycle Parking Racks around the community	0	0		9,500	10,088	-
E	MP	1999-04		St. Helens St. Striping (13th to Hwy 30)	0	0		500	531	-
F	MP	1999-04		St. Helens St. Striping (Old Portland to 1st)	0	0		500	531	-
G	MP	1999-04		Columbia Blvd. Striping	0	0		500	531	-
H	PFP	2005-09	5	West Street/Pittsburg Road Connection (City share)	5000	1600	3400 ADT	-	1,000,000	320,000
I	PFP/MP	2005-09	6	Old Portland Road Reconstruction; Pedestrian and Bicycle Improvements (St. Helens St. to Gable)	14200	3200	11000 ADT	1,867,000	1,982,652	446,795
J	PFP/MP	2005-09	7	Matzen St. Reconstruction and sidewalks	1400	500	900 ADT	384,000	407,787	145,638
K	PFP/MP	2005-09	8	11th St. sidewalks (West St. to Junior High)	0	0		13,000	13,805	-
L	PFP/MP	2005-09	9	15th St. sidewalks (Cowlitz St. to Old Portland Rd.)	0	0		18,000	19,115	-
M	PFP/MP	2005-09	10	Sykes Rd. sidewalks (Hwy 30 to Columbia) south side only	0	0		41,000	43,540	-
N	MP	2005-09		St. Helens St. Extension; Pedestrian and Bicycle Improvements	8700	1600	7100 ADT	1,011,000	1,073,627	197,449
O	PFP/MP	2010-20	11	Hwy. 30 Frontage Rd. (Millard Rd. to Sykes Rd.)	5500	2400	3100 ADT	5,150,000	5,469,019	2,386,481
P	PFP/MP	2010-20	12	Hwy. 30 Frontage Rd. (Columbia Blvd. to Pittsburg Rd.)	3000	1500	1500 ADT	2,030,000	2,155,749	1,077,875
Q	PFP/MP	2010-20	13	18th St. Reconstruction; Pedestrian and Bicycle Improvements (Columbia Blvd. to Pittsburg Rd.)	5700	2550	3150 ADT	520,000	552,212	247,042
R	PFP/MP	2010-20	14	Pittsburg Rd. Reconstruction; Pedestrian and Bicycle Improvements (Hwy 30 to Vernonia)	7000	3600	3400 ADT	1,118,000	1,187,255	610,588
S	PFP/MP	2010-20	15	Vernonia Rd. Reconstruction: Pedestrian and Bicycle Improvements (Hwy 30 to Pittsburg)	7300	3700	3600 ADT	839,000	890,972	451,589
T	PFP/MP	2010-20	16	Columbia Blvd. Reconstruction; Pedestrian and Bicycle Improvements (Hwy 30 to Sykes)	9000	3650	5350 ADT	630,000	669,026	271,327
U	PFP/MP	2010-20	17	Sykes Rd. Reconstruction (City Limits to UGB)	2800	600	2200 ADT	360,000	382,300	81,922
V	PFP/MP	2010-20	18	Millard Rd. Reconstruction and Bicycle Improvements	3700	2570	1130 ADT	630,000	669,026	464,702
W	PFP/MP	2010-20	19	Hwy 30 frontage Rd. Sidewalks (Millard To Pittsburg)	8500	3900	4600 ADT	296,000	314,336	144,225
O	PFP/MP	2010-20	20	Millard Rd. Sidewalks (Hwy 30 to Ross)	3700	2570	1130 ADT	175,000	185,840	129,084
P	PFP/MP	2010-20	21	West St. Sidewalk Improvements (Oregon to 4th)	0	0		89,000	94,513	-
Q	PFP/MP	2010-20	22	Gable Rd. Sidewalks (Old Portland to Hwy 30)	5	1	4-foot SW	56,000	59,469	11,894
R	MP	2010-20		Gable Rd. Bike Lanes (Old Portland to Hwy 30)	0	0		121,000	128,495	-
S	MP	2010-20		Vernonia to Bachelor Flat Bike Trail (BPA Easement)	0	0		166,000	176,283	-
T	MP	2010-20		Bachelor Flat Rd. Bike Lanes (Ross Rd. to Fairgrounds)	0	0		380,000	403,539	-
U	MP	2010-20		Sykes Rd. Bike Lane Columbia to Sauleer)	0	0		172,000	182,655	-
V	MP	2010-20		Sauleer Road Bike Lanes (Bachelor Flat to Sykes)	0	0		211,000	224,070	-
W	MP	2010-20		Old Portland Road Bike Lanes (Millard to Gable)	0	0		465,000	493,805	-
X	MP	?		McNutty Way Extension	1600	350	1250 ADT	1,290,000	1,369,910	299,668
Y	MP	?		Achilles Rd. Extension to Ross Rd.	2000	1100	900 ADT	1,530,000	1,624,776	893,627
Z	MP	?		Ross Rd. Extension (Bachelor Flat to Pittsburg)	5900	5100	800 ADT	1,640,000	1,741,590	1,505,443
AA	MP	?		Achilles Rd. Reconstruction (Hwy 30 to N. Morse Rd.)	2900	2000	900 ADT	380,000	403,539	278,303
BB	MP	?		Ross Rd. Reconstruction and Bicycle Improvements (Millard Rd. to Bachelor Flat Rd.)	2800	2000	800 ADT	743,000	789,025	563,590
CC	MP	?		Milton Way Extension (Port Ave. to Gable Rd.)	5500	1800	3700 ADT	700,000	743,362	243,262
DD	MP	?		Firlock Park Street Extension and Pedestrian Improvements (to Millard Rd.)	3000	1500	1500 ADT	952,000	1,010,972	505,486
EE	MP	?		N. Morse Rd. Reconstruction and Pedestrian Improvements (Achilles to Millard)	1500	750	750 ADT	466,000	494,867	247,433
FF	MP	?		Firlock Park Reconstruction and Pedestrian Improvements	2700	1200	1500 ADT	608,000	645,663	286,961
GG	MP	?		Industrial Way Extension (to Old Portland Rd.)	2200	500	1700 ADT	390,000	414,159	94,127
HH	MP	?		Highway 30/Gable Road Intersection Improvements	7600	4000	3600 ADT	80,000	84,956	44,713
II	MP	?		Traffic Signal at Highway 30/Millard Rd. Intersection	29800	11800	18000 ADT	200,000	212,389	84,100
JJ	MP	?		Traffic Signal at Highway 30/Vernonia Rd. Intersection	7300	3700	3600 ADT	200,000	212,389	107,649
KK	MP	?		Traffic Signal at Highway 30/Pittsburg Rd. Intersection	5000	1600	3400 ADT	200,000	212,389	67,965
LL	MP	?		Traffic Signal at Columbia Blvd /Vernonia Rd. Intersection	9000	3650	5350 ADT	200,000	212,389	86,136
MM	MP	?		Traffic Signal at Columbia Blvd./12th St. Intersection	11000	3550	7450 ADT	200,000	212,389	68,544
NN	MP	?		Traffic Signal at Columbia Blvd /6th St. Intersection	11000	3550	7450 ADT	200,000	212,389	68,544
OO	MP	?		Traffic Signal Coordination on Highway 30	26300	5300	21000 ADT	20,000	21,239	4,280
PP	MP	?		Achilles Road Sidewalks (Hwy 30 to Millard Rd.)	2000	1100	900 ADT	249,000	264,424	145,433
QQ	MP	?		Ross Rd Sidewalks (Millard to Pittsburg Rd.)	2800	2000	800 ADT	254,000	269,734	192,667
										$13,845,732
Total								$29,231,000	$32,041,726	$13,845,732
plus: SDC Credits Outstanding										$0
less: Current Improvement Fee Fund Balance										$765,046
Total Future Capital Projects for SDC Calculation										$13,080,686

NOTES:

(1) MP = Master Plan, PFP = Public Facilities Plan
(2) 1997 project costs from City of St. Helens Transportation System Plan
(3) 2000 project costs from City of St. Helens budgeted Public Facilities Plan (1999) or derived from an ENR CCI ratio of May 2000 to June 1997
(4) Oversize costs are based on prorated oversize capacities listed.
(5) Source: City staff.

City of St. Helens
SDC Study
SDC Calculation: Parks

Table 1

Reimbursement Fee

Cost of Net Unused Capacity	$	70,238	
Growth to End of Planning Period		6,000	Persons
Reimbursement Fee	$	11.71	per Person

Improvement Fee

Capacity Expanding CIP	$	1,796,980	
Growth to End of Planning Period		6,000	Persons
Improvement Fee	$	299.50	per Person

Total System Development Charge

Reimbursement Fee		$	11.71	per Person
Improvement Fee		$	299.50	per Person
SDC Subtotal		$	311.20	per Person
plus: Administrative Cost Recovery	0.58%		$1.80	per Person
Total SDC			**$313**	per Person

Example SDCs

Customer Type	Density	SDC	Basis
1 Mobile Homes	2.10	$ 657	per Dwelling Unit
2 MFR Units	2.10	$ 657	per Dwelling Unit
3 Low-cost SFR	2.60	$ 814	per Dwelling Unit
4 Moderate-cost SFR	2.60	$ 814	per Dwelling Unit
5 High-cost SFR	2.60	$ 814	per Dwelling Unit

City of St. Helens
SDC Study
Customer Data Compilation: Parks

Table 2

	2000	End of Period	Growth
Population	9,600 (1)	15,600 (2)	6,000

	Assumed DU Growth Pattern (1)	Assumed DU Densities	Growth Allocation
Dwelling Units			
Mobile Homes	5%	2.10	252
MFR Units	15%	2.10	756
Low-cost SFR	30%	2.60	1,872
Moderate-cost SFR	40%	2.60	2,496
High-cost SFR	10%	2.60	624
Total	2,400	2.50	6,000

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NOTES:

(1) Planning Commission Draft Executive Summary.

City of St. Helens
SDC Study
Existing Infrastructure Costs: Parks

ıble 3

Choose Existing Asset Method: 1 (1 = Method 1, 2 = Method 2)

Method 1: Original Cost

Utility Plant-in-Service	Original Cost	Reimbursement Amount	Cost Paid by City	Noncapacity Related	Capacity Related	Unused Capacity	Used Capacity
Black Walnut Park	$25,000		$25,000	$0	$25,000	$0	$25,000
Campbell Park			$0	$0	$0	$0	$0
Civic Pride Park			$0	$0	$0	$0	$0
Columbia Botanical Gardens			$0	$0	$0	$0	$0
Columbia View Park	$32,935	$13,608	$19,328	$0	$19,328	$0	$19,328
Godfrey Park	$2,200		$2,200	$0	$2,200	$0	$2,200
Heinie Heumann Memorial Park			$0	$0	$0	$0	$0
Highway 30 Greenway			$0	$0	$0	$0	$0
Little League Park			$0	$0	$0	$0	$0
McCormick Park	$228,000		$228,000	$0	$228,000	$0	$228,000
Sand Island Marine Park	$280,000		$280,000	$0	$280,000	$0	$280,000
Waterfront Park (Regional) (1)	$230,000		$230,000	$0	$230,000	$70,238	$159,762
less: Net Debt Principal Outstanding			$0	$0	$0	$0	$0
less: Grant Contributions (2)			$0	$0	$0	$0	$0
Allocable Plant-in-Service	$798,135	$13,608	$784,528	$0	$784,528	$70,238	$714,290

Method 2: Replacement Cost less Depreciation

	Replacement Cost	Noncapacity Related	Capacity Related	Unused Capacity	Used Capacity
Allocable Plant-in-Service	$ -				
less: Accumulated Depreciation					
plus: Construction Work in Progress	$0				
Net Replacement Plant-in-Service	$0	$0	$0	$0	$0

NOTES:

(1) Paid for out of general fund. Assessed valuation in the City, as provided by Columbia County Assessor:

	1999-2000	
Land	$ 104,122,800	20.6%
Improvements	$ 401,305,080	79.4%

% Improvements represents portion of unused capacity unpaid by property to be developed.
Park assumed to provide capacity available to serve existing and future population at buildout.

(2) Non-SDC contributed capital

City of St. Helens
SDC Study
Project List: Parks

Table 4

#	Project Source	Year	Project Description	Capacity	Extra Capacity	Replacing	2000 Project Cost (1)	SDC Eligible Cost
New Parks								
A	Staff	2002	Three-acre park in Area One (2)				$ 144,000	$ 55,380
B	Staff	2005	Three-acre park in Area Two (3)				$ 144,000	$ 55,380
C	Staff	2005	Three-acre park in Area Three (4)				$ 144,000	$ 55,380
D	Staff	2010	Three-acre park in Area Four (5)				$ 144,000	$ 55,380
Park Development								
1	Staff	NA	Campbell Park				$ 388,000	$ 74,077
2	Staff	NA	Civic Pride Park				$ 130,000	$ 26,538
3	Staff	NA	Godfrey Park				$ 58,000	$ 58,000
4	Staff	NA	Heine Huemann Park				$ 190,000	$ 134,923
5	Staff	NA	Little League Park				$ 38,000	$ 20,000
6	Staff	NA	McCormick Park				$ 744,000	$ 614,769
7	Staff	NA	Sand Island Marine Park				$ 387,000	$ -
8	Staff	NA	Columbia View Park				$ 50,000	$ 19,231
9	Staff	NA	Botanical Garden				$ 10,000	$ 3,846
10	Staff	NA	New Riverfront Park				$ 330,000	$ 126,923
11	Staff	NA	New (West Side) 50-acre Park				$ 2,400,000	$ 923,077
							$5,301,000	$2,222,905
Total							$5,301,000	$2,222,905
Plus: SDC Credits Outstanding								$0
less: Current Improvement Fee Fund Balance								$425,925
Total Future Capital Projects for SDC Calculation								$1,796,980

NOTES:

(1) Cost estimated from other parks costs. Average loaded cost per acre = $ 48,000
(2) Area One includes the area 1/2 mile west of McBride School and along Sykes Road.
(3) Area Two includes the area 1/4 mile north near Hankey Road.
(4) Area Three includes the area between Millard and Maple Roads, just west of Division.
(5) Area Four includes the area just east of Highway 30 and Achilles Road.

City of St. Helens
SDC Study
Administrative Cost Recovery

Table A

Net Annual Administrative Cost related to SDCs (1)	$	3,000
Amortization of SDC Analysis Cost over 5 years (2):	$	8,546
Net Annual SDC Administrative Cost:	**$**	**11,546**

Estimated Annual Proposed SDC Revenues before Admin. Cost:		
Water SDC	$	469,334
Wastewater SDC		222,033
Stormwater SDC		532,717
Street SDC		654,034
Parks SDC		116,701
Estimated Annual Revenue	$	1,994,820

Admin. Cost/Total Annual SDC Revenues **0.58%** on all SDCs

NOTES:

(1) Source: City Staff.

(2)

Cost of:	**$37,000**
at:	**5.0%**
over:	**5** years

Appendix B

Final Ordinance & Resolution

Ordinance No. 2836

AN ORDINANCE PROVIDING FOR SYSTEM DEVELOPMENT CHARGES AND REPEALING ORDINANCE NO. 2619

THE CITY OF ST. HELENS DOES ORDAIN AS FOLLOWS:

Section 1. Purpose. The purpose of the system development charge is to impose a portion of the cost of capital improvements for water, wastewater, drainage, streets, flood control, and parks upon those developments that create the need for or increase the demand on capital improvements.

Section 2. Scope. The system development charge imposed by this ordinance is separate from and in addition to any applicable tax, assessment, charge, or fee otherwise provided by law or imposed as a condition of development.

Section 3. Definitions. For the purposes of this ordinance, the following mean:

Capital improvements.

(a) Facilities or assets used for:
Water supply, treatment and distribution;
Waste water collection, transmission, treatment and disposal;
Drainage and flood control;
Transportation; or
Parks and recreation.

(b) "Capital improvement" does not include costs of the operation or routine maintenance of capital improvements.

Development. Any manmade change to improved or unimproved real estate, including but not limited to buildings or other structures, mining, dredging, filling, grading, paving, excavation, or drilling operations.

Development Permit. Any City of St. Helens permit to authorize development.

Improvement fee. A fee for costs associated with capital improvements to construction after the date the fee is adopted pursuant to Section 4 of this ordinance.

Land area. The area of a parcel of land as measured by projection of the parcel boundaries upon a horizontal plane with the exception of a portion of the parcel within a recorded right of way or easement subject to a servitude for a public street or scenic or preservation purposes.

Owner. The owner or owners of record title or the purchaser or purchasers under a recorded sales agreement, and other persons having an interest of record in the described real property.

Parcel of land. A lot, parcel, block, or other tract of land that is occupied or may be occupied by a structure or structures or other use, and that includes the yards and other open spaces required under the zoning, subdivision, or other development ordinances.

Permittee means the person to whom a building permit, development permit, a permit or plan approval to connect to the sewer or water system, or right of way access permit is issued.

Qualified public improvements. A capital improvement that is:

(a) Required as a condition of residential development approval;

(b) Identified in the plan adopted pursuant to Section 8 of this ordinance; and either:

  (i) Not located on or contiguous to a parcel of land that is the subject of the residential development approval; or

  (ii) Located in whole or in part on or contiguous to property that is the subject of development approval and required to be built larger or with greater capacity than is necessary for the particular development project to which the improvement fee is related.

(c) For purposes of this definition, contiguous means in a public way which abuts the parcel.

Reimbursement fee. A fee for costs associated with capital improvements constructed or under construction on the date the fee is adopted pursuant to Section 4 of this ordinance.

System development charge. A reimbursement fee, an improvement fee or a combination thereof assessed or collected at the time of increased usage of a capital improvement, at the time of issuance of a development permit or building permit, or at the time of connection to capital improvement. "System development charge" includes that portion of a sewer or water system connection charge that is greater than the amount necessary to reimburse the City for its average cost of inspecting and installing connections with water and sewer facilities. "System development charge" does not include fees assessed or collected as part of a local improvement district or a charge in lieu of a local improvement district assessment, or the cost of complying with requirements or conditions imposed by a land use decision, expedited land division or limited land use decision.

Section 4. System Development Charge Established.

1. System development charges shall be established and may be revised by resolution of the Council. The resolution shall set the amount of the charge, the type of permit to which the charge applies, and, if the charge applies to a geographic area smaller than the entire City, the geographic area subject to the

charge.

2. Unless otherwise exempted by the provisions of this ordinance or other local or state law, a system development charge is hereby imposed upon all development within the City, and upon all development outside the boundary of the City that connects to or otherwise uses the sewer facilities, storm sewers, or water facilities of the City.

Section 5. Methodology.

1. The methodology used to established the reimbursement fee shall consider the cost of then-existing facilities, prior contributions by then-existing users, the value of unused capacity, rate-making principles employed to finance publicly owned capital improvements, and other relevant factors identified by the Council. The methodology shall promote the objective that future system users shall contribute no more than an equitable share of the costs of then-existing facilities.

2. The methodology used to establish the improvement fee shall consider the cost of projected capital improvements needed to increase the capacity of the system to which the fee is related.

3. The methodology used to establish the improvement fee or the reimbursement fee, or both, shall be contained in an ordinance adopted by the Council.

Section 6. Authorized Expenditures.

1. Reimbursement fees shall be applied only to capital improvements associated with the system for which the fees are assessed, including expenditures relating to repayment of indebtedness.

2. Improvement fees shall be spent only on capacity increasing capital improvements, including expenditures relating to repayment for such improvements. An increase in system capacity occurs if a capital improvement increases the level of performance or service provided by existing facilities or provides new facilities. The portion of the capital improvement funded by improvement fees must be related to demands created by current or projected development. Improvement fees shall not be expended for costs associated with the construction of administrative office facilities that are more than an incidental part of other capital improvements.

3. A capital improvement being funded wholly or in part from revenues derived from the improvement fee shall be included in the plan adopted by the City pursuant to Section 8 of this ordinance.

4. Notwithstanding subsections 1 and 2 of this section, system development charge revenues may be expended on the direct costs of complying with the provisions

of this ordinance, including the costs of developing system development charge methodologies and providing an annual accounting of system development charge expenditures.

Section 7. Expenditure Restrictions.

1. System development charges shall not be expended for costs associated with the construction of administrative offices facilities that are more than an incidental part of other capital improvements.

2. System development charges shall not be expended for costs of the operation or routine maintenance of capital improvements.

Section 8. Improvement Plan. The Council shall adopt a plan that:

1. Lists the capital improvements that may be funded with improvement fee revenues;

2. Lists the estimated cost and time of construction of each improvement; and

3. Describes the process for modifying the plan.

4. In adopting this plan, the Council may incorporate by reference all or a portion of any public facilities plan, master plan, capital improvements plan or similar plan that contains the information required by this section.

Section 9. Collection of Charge.

1. The system development charge shall be paid upon issuance of:
   (a) A building permit;
   (b) Any other permit for development not requiring the issuance of a building permit;
   (c) A permit to connect to the water system; or
   (d) A permit to connect to the sewer system.
   (e) A right of way access permit.

2. If no building, development, or connection permit is required, the system development charge is payable at the time the usage of the capital improvement is increased.

3. If development is commenced or connection is made to the water or sewer system without an appropriate permit, the system development charge is immediately payable upon the earliest date that a permit was required.

4. The permittee shall pay applicable system development charges when a building or development permit is issued or when a connection to the water or sewer

system of the City is made.

5. No permit shall be issued or connection allowed until the charge has been paid in full, until provision for installment payment has been made pursuant to Section 11 of this ordinance, or unless an exemption is granted pursuant to Section 12 of this ordinance.

Section 10. Delinquent Charges; Hearing.

1. When, for any reason, the system development charge has not been paid, the Finance Officer shall report to the Council the amount of the uncollected charge, the description of the real property to which the charge is attributed, the date upon which the charge was due, and the name of the owner.

2. The City Council shall, by motion, schedule a public hearing on the matter and direct that notice of the hearing be given to each owner with a copy of the Finance Officer's report concerning the unpaid charge. Notice of the hearing shall be given either personally or by certified mail, return receipt requested, or by both personal and mailed notice, and by posting notice on the parcel at least 10 days before the date set for the hearing.

3. At the hearing, the Council may accept, reject, or modify the determination of the Finance Officer as set forth in the report. If the Council finds that a system development charge is unpaid and uncollected, it shall, by motion, place a lien on the property in the appropriate form. Upon completion of the docketing, the City shall have a lien against the described land for the full amount of the unpaid charge, together with interest at the legal rate of 10 percent and with the City 's actual cost of serving notice of the hearing on the owners. The lien shall be enforceable in the manner provided in ORS Chapter 223.

Section 11. Installment Payment.

1. Except as provided for in Section 9.3, when a system development charge of $25 or more is due and collectible, the owner of the parcel of land subject to the development charge may apply for payment in 20 semi-annual installments, to include interest on the unpaid balance, in accordance with ORS 223.208.

2. The City Administrator shall provide application forms for installments payments, which shall include a waiver of all rights to contest the validity of the lien, except for the correction of computational errors.
3. An applicant for installment payments shall have the burden of demonstrating the applicant's authority to assent to the imposition of a lien on the parcel and that the interest of the applicant is adequate to secure payment of the lien.

4. The City Administrator shall report to the City Finance Officer the amount of the system development charge, the dates on which the payments are due, the

name of the owner, and the description of the parcel.

5. The Finance Officer shall docket the lien in the lien docket. From that time, the City shall have a lien upon the described parcel for the amount of the system development charge, together with interest on the unpaid balance at the rate established by the Council. The lien shall be enforceable in the manner provided in ORS Chapter 223.

Section 12. Exemptions.

1. Structures and uses established and existing on or before June 19, 1991, are exempt from a system development charge, except water and sewer charges, to the extent of the structure or use then existing and to the extent of the parcel of land as it is constituted on that date. Structures and uses affected by this subsection shall pay the water or sewer charges pursuant to the terms of this ordinance upon the receipt of a permit to connect to the water or sewer system.

2. Additions to single-family dwellings that do not constitute the addition of a dwelling unit, as defined by the State Uniform Building Code, are exempt from all portions of the system development charge.

3. Alterations, additions, replacements, or changes in use that do not increase the parcel or structure's use of the public improvement facility are exempt from all portions of the system development charge.

4. A project financed by City revenues is exempt from all portions of the system development charge.

Section 13. Credits.

1. When development occurs that is subject to a system development charge, the system development charge for the existing use, if applicable, shall be calculated and if it is less than the system development charge for the use that will result from the development, the difference between the system development charge for the existing use and the system development charge for the proposed use shall be the system development charge. If the change in the use results in the system development charge for the proposed use being less than the system development charge for the existing use, no system development charge shall be required. No refund or credit shall be given unless provided for by another subsection of this section.

2. A credit shall be given to the permittee for the cost of a qualified public improvement upon acceptance by the City of the public improvement. The credit shall not exceed the improvement fee even if the cost of the capital improvement exceeds the applicable improvement fee and shall only be for the improvement fee charged for the type of improvement being constructed.

3. If a qualified public improvement is located in whole or in part on or contiguous to the property that is the subject of development approval and is required to be built larger or with greater capacity than is necessary for the particular development project, a credit shall be given for the cost of the portion of the improvement that exceeds the City's minimum standard facility size or capacity needed to serve the particular development project or property. The applicant shall have the burden of demonstrating that a particular improvement qualifies for credit under this section. The request for credit shall be filed in writing no later than 60 days after acceptance of the improvement by the City.

4. When the construction of a qualified public improvement located in whole or in part or contiguous to the property that is the subject of development approval gives rise to a credit amount greater than the improvement fee that would otherwise be levied against the project, the construction cost may be applied against improvement fees that accrue in subsequent phases of the original development project.

5. Notwithstanding subsections 3 and 4, when establishing a methodology for a system development charge, the City may provide for a credit against the improvement fee, the reimbursement fee, or both, for capital improvements constructed as part of the development which reduce the development's demand upon existing capital improvements and/or the need for future capital improvements, or a credit based upon any other rationale the council finds reasonable.

6. Credit shall not be transferable from one development to another except in compliance with standards adopted by the City Council.

7. Credit shall not be transferable from one type of system development charge to another.

8. Credits shall be used within 10 years from the date the credit is given.

Section 14. Notice.

1. The City shall maintain a list of persons who have made a written request for notification prior to adoption or amendment of a methodology for any system development charge. Written notice shall be mailed to persons on the list at least 45 days prior to the first hearing to adopt or amend a system development charge, and the methodology supporting the adoption or amendment shall be available at least 30 days prior to the first hearing to adopt or amend. The failure of a person on the list to receive a notice that was mailed shall not invalidate the action of the City Council.

2. The City may periodically delete names from the list, but at least 30 days prior to

removing a name from the list must notify the person whose name is to be deleted that a new written request for notification is required if the person wishes to remain on the notification list. No legal action intended to contest the methodology used for calculating a system development charge shall be filed after 60 days following adoption or modification of the system development charge ordinance or resolution by the City. A person shall contest the methodology used for calculating a system development charge only as provided in ORS 34.010 to 34.100, and not otherwise.

Section 15. Segregation and Use of Revenue.

1. All funds derived from a particular type of system development charge are to be segregated by accounting practices from all other funds of the City. That portion of the system development charge calculated and collected on account of a specific facility system shall be used for no purpose other than those set forth in Section 6 of this ordinance.

2. The Finance Officer shall provide the City Council with an annual accounting, based on the City's fiscal year, for system development charges showing the total amount of system development charge revenue collected for each type of facility and the projects funded from each account.

Section 16. Appeals Procedure.

1. A person challenging the propriety of an expenditure of system development charge revenues may appeal the decision or the expenditure to the City Council by filing a written request with the City Administrator describing with particularity the decision of the City Council and the expenditure from which the person appeals. An appeal of an expenditure must be filed within two years of the date of the alleged improper expenditure.

2. Appeals of any other decision required or permitted to be made by the City Administrator under this ordinance must be filed within 10 days of the date of the decision.

3. After providing notice to the appellant, the Council shall determine whether the City Administrator's decision or the expenditure is in accordance with this ordinance and the provisions of ORS 223.297 to 223.314 and may affirm, modify, or overrule the decisions. If the Council determines that there has been an improper expenditure of system development charge revenues, the Council shall direct that a sum equal to the misspent amount shall be deposited within one year to the credit of the account or fund from which it was spent. The decision of the Council shall be reviewed only as provided in ORS 34.010 to ORS 34.100, and not otherwise.

4. A legal action challenging the methodology adopted by the Council pursuant to

Section 5 shall not be filed later than 60 days after the adoption. A person shall contest the methodology used for calculating a system development charge only as provided in ORS 34.010 to ORS 34.100, and not otherwise.

Section 17. Prohibited Connection. No person may connect to the water or sewer system of the City unless the appropriate system development charge has been paid or the lien or installment payment method has been applied for and approved.

Section 18. Penalty. Violation of this ordinance is punishable by a fine not to exceed $500, or any other remedy as provided by law.

Section 19. Construction. The rules of statutory construction contained in ORS Chapter 174 are adopted and by reference made a part of this ordinance.

Section 20. Severability. The invalidity of a section or subsection of this ordinance shall not affect the validity of the remaining sections or subsections.

Section 21. Repeal. Ordinance No. 2619 is hereby repealed.

Read the first time: February 21, 2001

Read the second time: February 21, 2001

Read the third time and passed: March 7, 2001

Approved by the Mayor:

ATTESTED BY:

City Recorder

Mayor

Resolution No. 1305

A RESOLUTION ESTABLISHING SYSTEM DEVELOPMENT CHARGES

WHEREAS, The City of St Helens conducted a study to determine the appropriate charges for system development fees; and

WHEREAS, The City Council wishes to implement the study.

NOW, THEREFORE, the City Council of the City of St. Helens resolves that its system development charges and supporting information shall be determined as follows:

Section 1 System Development Charge Determination

Service	System Development Charge	
Water	**$2,530.00**	per Equivalent Residential Unit
Wastewater	**$1,271.00**	per Equivalent Residential Unit
Stormwater	**$230.00**	per 1,000 Square Feet of Impervious Area
Transportation	**$322.00**	per Daily Trip End
Parks	**$814.00** **$657.00**	per Single Family Dwelling Unit per Multi-family Dwelling Unit

Section 2 System development charges are established using the project lists provided in Exhibits A – Water Project List; B – Sanitary Sewer Project List; C – Stormwater Project List; D – Transportation / Streets Project List, and E – Parks Project List.

Section 3 The System development charges established in Section 1 above shall be effective on July 1, 2001.

Passed and adopted by the City Council on _____, 2001 by the following vote:

Yes:_____

No:_____

Attested:

_____ _____

City Recorder Mayor

Exhibit A
Water Project List

#	Project Source	Year	'99 PFP Priority	Project Description	2000 Project Cost	SDC Eligible Cost
B	MP/PFP	2000-01	2	High Level Reservoir	$ 750,000	$ 300,000
C	MP	2000-02		12-inch main on Gable Rd. from Hwy 30 to High School	30,000	16,667
D	MP	2000-02		12-inch main on Gable Rd. along High School	120,000	66,667
E	MP/PFP	2000-09	3	Steel Mains Replacement	3,000,000	-
F	MP	2002-05		10-inch main to the junior high school from West St.	105,331	37,919
G	MP	2002-05		8-inch parallel main on Pittsburg Road to serve upper level areas near Novella Ave.	140,441	-
H	MP/PFP	2002-05	4	20-inch transmission main from new reservoir to Columbia Blvd. (base level)	1,325,000	-
I	MP/PFP	2002-05	5	Base Level Reservoir	2,230,000	2,038,857
J	MP/PFP	2002-05	6	Rehabilitation of Ranney Collectors #1 and #2 (6)	300,000	228,000
K	MP/PFP	2003-06	7	Water Treatment Plant	4,938,000	1,481,400
L	PFP	2002-20	8	12" waterline loop - Millard/Old Portland to McNulty Creek	160,000	88,889
M	PFP	2002-20	9	12" line, Hwy 30/Millard Rd. to Ross Rd.	430,000	238,889
N	PFP	2002-20	10	12" line, Ross Rd./Millard to Bachelor Flat Rd.	260,000	144,444
O	PFP	2002-20	11	12" line, Bachelor Flat Rd. from Gable Rd. to Ross Rd.	120,000	66,667
P	PFP	2002-20	12	Old Portland Road 10" waterline spur to UGB	125,000	45,000
Q	PFP	2002-20	13	12" line, Bayport well to Achilles Rd./Hwy 30, west to Fischer, north to Millard	530,000	294,444
R	MP/PFP	2002-20	14	Base Level Reservoir (6)	2,000,000	514,286
S	MP/PFP	2002-20	15	Water Treatment Plant Upgrade (6)	1,350,000	1,026,000
T	MP	2002-20		Lemont Street Pump Station & Modification of Existing 14-inch Pump Main (to High Service Level)	224,000	74,667
Total					$18,137,772	$6,662,795

Exhibit B
Wastewater Project List

#	Project Source	Year	'99 PFP Priority	Project Description	2000 Project Cost	SDC Eligible Cost
A	PFP	2000-04	1	Study for West McNulty Creek Area (Hwy. 30 to Ross Rd.)	$ 50,000	$ 50,000
B	PFP	2000-04	2	Railroad Avenue and Pump Station	420,000	-
C	PFP	2000-04	5	Clark Street to Pump Station	85,000	-
D	PFP	2000-04	6	McNulty Creek Industrial area and 9th St. Parallel to Old Portland Rd.	315,000	-
E	PFP	2000-04	7	Hwy. 30 (Gable Rd. to Millard Rd.) and Pump Station	235,000	47,000
F	Staff	2001		Head works upgrade	200,000	100,000
G	Staff	2000-04		Stormwater separation and INI reduction	2,750,000	-
H	Staff	2000-04		Main Replacement	750,000	-
I	PFP	2005-09	8	Gray Cliff area to Pump Station	195,000	-
J	PFP	2005-09	9	Old Portland Rd. from Letica to Bayport to McNulty Creek Pump Station	732,000	-
K	PFP	2005-09	10	Bachelor Flat Rd., Ross to Fairgrounds	175,000	-
L	Staff	2005-10		Main Replacement	750,000	-
L	PFP	2010-20	12	Hwy. 30 north to Pittsburg to Deer Island Road	200,000	-
M	PFP	2010-20	13	Pittsburg Rd. from Reservoir to North Vernonia Road	190,000	-
N	PFP	2010-20	14	Achilles (Urban Growth Boundary [west] to Old Portland Rd.)	300,000	-
O	MP	2000-20		McNulty Creek Trunk Phase I	636,014	617,275
P	MP	2000-20		Highway 30 Trunk	751,292	336,922
Q	MP	2000-20		Bayview Pump Station and Force Main	512,786	232,100
R	MP	2000-20		Gable Road Trunk	162,979	-
S	MP	2000-20		Vernonia Road Trunk Phase I	488,936	219,266
T	MP	2000-20		South Trunk Replacement	2,603,683	2,526,968
U	MP	2000-20		McNulty Creek Trunk Phase II	345,833	319,456
V	MP	2000-20		Firlock Park Trunk	397,509	178,265
W	MP	2000-20		Sykes Road Trunk Extension	186,829	-
X	MP	2000-20		Vernonia Road Trunk Phase II	318,007	-
Y	MP	2000-20		McNulty Creek Trunk Phase III	208,692	184,683
Z	MP	2000-20		Aubuchon Trunk	314,032	-
AA	MP	2000-20		Old Portland Rd. Trunk	252,418	-
BB	MP	2000-20		Firtex Pump Station and Force Main	373,658	373,700
CC	MP	2000-20		Bayview Trunk	347,820	155,982
					$15,247,487	$5,341,618

Exhibit C
Storm Drainage Project List

#	Project Source	Year	'99 PFP Priority	Project Description	2000 Project Cost	SDC Eligible Cost
A	PFP/MP	1999-04	1	Middle Trunk bypass at 15th St. north of Plymouth St. and downstream culverts	$ 471,000	$ 240,210
B	PFP/MP	1999-04	2	Middle/North Trunk outlet northeast of 4th St./Columbia Blvd. to the Columbia River discharge. Includes upgrade of 2nd St. culvert south of West St. and its associated downstream piping.	1,016,000	518,160
C	PFP/MP	1999-04	3	Upgrade existing Middle Trunk piping from 15th St. to 4th St.	1,316,000	671,160
D	PFP/MP	2005-09	4	Upgrade existing undersized piping in Columbia Blvd. west of Milton Creek to Cherrywood Dr. including re-routing Vernonia Rd. flows down Michael Ave. to Milton Creek.	1,664,000	848,640
E	PFP/MP	2005-09	5	Upgrade existing undersized culverts in the North Trunk Canyon at 12th St., 8th St., from 7th St. to 6th St. and from 5th St. to the east side of 4th St.	324,000	165,240
F	PFP/MP	2005-09	6	Upgrade existing undersized culvert and piping system extending from U.S. 30 east to 8th St. along Lemont St.	1,126,000	574,260
G	PFP/MP	2005-09	7	Upgrade existing undersized piping on 4th St. roughly between Cowlitz St. and St. Helens St. and the system outlet on Cowlitz St. near The Strand.	238,000	121,380
H	PFP/MP	2010-2019	8	Upgrade existing undersized culverts located at the intersection of Gable Road and Old Portland Road and on Gable Road approximately 1400 feet east of U.S. 30.	214,000	109,140
I	PFP/MP	2010-2019	9	Upgrade existing undersized piping on Little St. NW of U.S. 30 to Milton Creek discharge.	135,000	68,850
J	PFP/MP	2010-2019	10	Upgrade existing undersized piping on Sunset Blvd. from Crescent Dr. to Columbia Blvd.	322,000	164,220
K	PFP/MP	2010-2019	11	Upgrade existing undersized piping extending from Cowlitz St. to Tualatin St. along 20th-16th Streets.	678,000	345,780
	PFP/MP	2010-2019	12	Upgrade existing undersized piping extending from Cowlitz St. to the Middle Trunk system on 13th St. & 14th St.	402,000	205,020
L	PFP/MP	2010-2019	13	Upgrade existing undersized system extending from 11th St. to 5th St. between West St. and Wyeth St.	654,000	333,540
M	PFP/MP	2010-2019	14	Upgrade existing system outlet at Sykes Road and U.S. 30	337,000	171,870
N	PFP/MP	2010-2019	15	Upgrade existing pipe from 20th St. to Milton Creek along Crouse Wy.	356,000	181,560
O	PFP/MP	2010-2019	16	Upgrade existing undersized piping along Tualatin St. from 19th St. to McNulty Creek and Dubois Ln. from 20th St. to Melvin Ave. Reroute Dubois Ln. flows to Tualatin St. outfall.	337,000	171,870
P	PFP/MP	2010-2019	17	Construct a new storm line from Wagner Ave. extending down Shore Dr. approximately 750 feet to existing outfall.	311,000	158,610
Q	PFP/MP	2010-2019	18	Upgrade existing undersized culverts North of Columbia Blvd. at McMichael St. and at Allendale Dr.	145,000	73,950
R	PFP/MP	2010-2019	19	Upgrade existing undersized culvert and piping system extending from 3rd St. to 8th St. along Lemont St. and from 7th St. to Lemont St. along 8th St.	427,000	217,770
S	PFP/MP	2010-2019	20	Upgrade existing undersized piping extending from 14th St. N. of St. Helens to 16th St. S. of St. Helens. Upgrade existing piping from 16th St. south of St. Helens to 12th St. north of St. Helens. Connect the existing culvert S. of St. Helens at 15th St. to the improved system at 16th St.	178,000	90,780
T	PFP/MP	2010-2019	21	Upgrade existing undersized piping along 16th St. north of Old Portland Rd. and culverts at 17th St. and Old Portland Rd.	109,000	55,590
U	PFP/MP	2010-2019	22	Upgrade existing undersized piping on Gable Rd. and U.S. 30.	201,000	102,510
V	PFP/MP	2010-2019	23	Construct a new storm line from McArthur St. to Milton Creek along Halsey St. Upgrade existing undersized piping on Nimitz St. from McArthur St. to Milton Creek and on Park St. from Vernonia Rd. to Milton Creek.	307,000	156,570
W	PFP/MP	2010-2019	24	Upgrade existing undersized culverts at the Hinterlands Subdivision	137,000	69,870
X	PFP/MP	2010-2019	25	Upgrade existing undersized piping SW of City sewage lagoons at Boise Cascade site.	1,206,000	615,060
Y	PFP/MP	2010-2019	26	Upgrade existing undersized piping north of Columbia Blvd. at 21st St. and 20th St.	241,000	122,910
Z	PFP/MP	2010-2019	27	Upgrade existing undersized piping at Columbia Blvd. and 7th St. and extend new piping south down 7th St. to the Middle Trunk canyon outlet.	155,000	79,050
AA	PFP/MP	2010-2019	28	Upgrade existing undersized piping along 1st St. and St. Helens St.	101,000	51,510
BB	PFP/MP	2010-2019	29	Upgrade existing undersized piping on Columbia Blvd. from Bradley St. to Milton Creek.	70,000	35,700
CC	PFP/MP			Install new conveyance facility from Pittsburg Rd. to the upstream end of the Lemont St. system.	1,040,000	530,400
DD	PFP/MP			Install new conveyance facility along Vernonia Rd. south to Columbia Blvd.	733,000	373,830
EE	PFP/MP			Install new conveyance facility along Sykes Rd. west of Columbia Blvd.	572,000	291,720
FF	PFP/MP			Install new conveyance facility from U.S. 30 north of Kavanaugh St. to McNulty Cr. near Gable Rd.	575,000	293,250
GG	PFP/MP			Install new conveyance facilities from Millard Rd. and Morse Rd. to Old Portland Rd. north of Millard Rd. Upgrade existing culverts and channels at the U.S. 30 crossing north of Millard Rd.	1,018,000	519,180
HH	PFP/MP			Install new conveyance facilities along the southerly portion of Childs Rd. to McNulty Creek.	242,000	123,420
II	PFP/MP			Install new conveyance facilities from Bachelor Flat Rd. south down Ross Rd. to McNulty Creek.	903,000	460,530
JJ	PFP/MP			Install new conveyance facility from Morse Rd. to the Columbia River along Achilles Rd. Connect to existing 24-inch culvert across the Portland and Western Railroad.	1,205,000	614,550
KK	PFP/MP			Install new conveyance system from Morse Rd. to Old Portland Rd. between Achilles Rd. and Millard Rd. Includes improving existing 18-inch culvert across the Portland and Western Railroad.	1,464,000	746,640
LL	PFP/MP			Install new conveyance facility south of Millard Rd. extending from Fischer Rd. to the easterly side of the Portland and Western Railroad and continuing south. Includes improving existing 15-inch culvert across the Portland and Western Railroad and tie-in to existing 24-inch culvert.	421,000	214,710
					-	-
					$21,351,000	$10,889,010

Exhibit D
Transportation / Streets Project List

#	Project Source	Year	'99 PFP Priority	Project Description	2000 Project Cost	SDC Eligible Cost
A	PFP/MP	1999-04	1	Gable Rd. Reconstruction; Pedestrian and Bicycle Improvements (Hwy 30 to Bachelor Flat)	$ 703,008	$ 370,004
B	PFP/MP	1999-04	2	Sykes Rd. Reconstruction and Pedestrian Improvements (Columbia to City Limits)	387,610	83,059
C	PFP/MP	1999-04	3	Bachelor Flat Rd. Reconstruction; Pedestrian and Bicycle Improvements (Sykes to Ross)	1,007,786	618,109
D	PFP/MP	1999-04	4	Add Bicycle Parking Racks around the community	10,088	-
E	MP	1999-04		St. Helens St. Striping (13th to Hwy 30)	531	-
F	MP	1999-04		St. Helens St. Striping (Old Portland to 1st)	531	-
G	MP	1999-04		Columbia Blvd. Striping	531	-
H	PFP	2005-09	5	West Street/Pittsburg Road Connection (City share)	1,000,000	320,000
I	PFP/MP	2005-09	6	Old Portland Road Reconstruction; Pedestrian and Bicycle Improvements (St. Helens St. to Gable)	1,982,652	446,795
J	PFP/MP	2005-09	7	Matzen St. Reconstruction and sidewalks	407,787	145,638
K	PFP/MP	2005-09	8	11th St. sidewalks (West St. to Junior High)	13,805	-
L	PFP/MP	2005-09	9	15th St. sidewalks (Cowlitz St. to Old Portland Rd.)	19,115	-
M	PFP/MP	2005-09	10	Sykes Rd. sidewalks (Hwy 30 to Columbia) south side only	43,540	-
N	MP	2005-09		St. Helens St. Extension; Pedestrian and Bicycle Improvements	1,073,627	197,449
O	PFP/MP	2010-20	11	Hwy. 30 Frontage Rd. (Millard Rd. to Sykes Rd.)	5,469,019	2,386,481
P	PFP/MP	2010-20	12	Hwy. 30 Frontage Rd. (Columbia Blvd. to Pittsburg Rd.)	2,155,749	1,077,875
Q	PFP/MP	2010-20	13	18th St. Reconstruction; Pedestrian and Bicycle Improvements (Columbia Blvd. to Pittsburg Rd.)	552,212	247,042
R	PFP/MP	2010-20	14	Pittsburg Rd. Reconstruction; Pedestrian and Bicycle Improvements (Hwy 30 to Vernonia)	1,187,255	610,588
S	PFP/MP	2010-20	15	Vernonia Rd. Reconstruction; Pedestrian and Bicycle Improvements (Hwy 30 to Pittsburg)	890,972	451,589
T	PFP/MP	2010-20	16	Columbia Blvd. Reconstruction; Pedestrian and Bicycle Improvements (Hwy 30 to Sykes)	669,026	271,327
U	PFP/MP	2010-20	17	Sykes Rd. Reconstruction (City Limits to UGB)	382,300	81,922
V	PFP/MP	2010-20	18	Millard Rd. Reconstruction and Bicycle Improvements	669,026	464,702
W	PFP/MP	2010-20	19	Hwy 30 frontage Rd. Sidewalks (Millard To Pittsburg)	314,336	144,225
O	PFP/MP	2010-20	20	Millard Rd. Sidewalks (Hwy 30 to Ross)	185,840	129,084
P	PFP/MP	2010-20	21	West St. Sidewalk Improvements (Oregon to 4th)	94,513	-
Q	PFP/MP	2010-20	22	Gable Rd. Sidewalks (Old Portland to Hwy 30)	59,469	11,894
R	MP	2010-20		Gable Rd. Bike Lanes (Old Portland to Hwy 30)	128,495	-
S	MP	2010-20		Vernonia to Bachelor Flat Bike Trail (BPA Easement)	176,283	-
T	MP	2010-20		Bachelor Flat Rd. Bike Lanes (Ross Rd. to Fairgrounds)	403,539	-
U	MP	2010-20		Sykes Rd. Bike Lane Columbia to Saulser)	182,655	-
V	MP	2010-20		Saulser Road Bike Lanes (Bachelor Flat to Sykes)	224,070	-
W	MP	2010-20		Old Portland Road Bike Lanes (Millard to Gable)	493,805	-
X	MP	?		McNulty Way Extension	1,369,910	299,668
Y	MP	?		Achilles Rd. Extension to Ross Rd.	1,624,776	893,627
Z	MP	?		Ross Rd. Extension (Bachelor Flat to Pittsburg)	1,741,590	1,505,443
AA	MP	?		Achilles Rd. Reconstruction (Hwy 30 to N. Morse Rd.)	403,539	278,303
BB	MP	?		Ross Rd. Reconstruction and Bicycle Improvements (Millard Rd. to Bachelor Flat Rd.)	789,025	563,590
CC	MP	?		Milton Way Extension (Port Ave. to Gable Rd.)	743,362	243,282
DD	MP	?		Firlock Park Street Extension and Pedestrian Improvements (to Millard Rd.)	1,010,972	505,486
EE	MP	?		N. Morse Rd. Reconstruction and Pedestrian Improvements (Achilles to Millard)	494,867	247,433
FF	MP	?		Firlock Park Reconstruction and Pedestrian Improvements	645,663	286,961
GG	MP	?		Industrial Way Extension (to Old Portland Rd.)	414,159	94,127
HH	MP	?		Highway 30/Gable Road Intersection Improvements	84,956	44,713

Transportation / Streets Project List, continued

II	MP	?	Traffic Signal at Highway 30/Millard Rd. Intersection	212,389	84,100
JJ	MP	?	Traffic Signal at Highway 30/Vernonia Rd. Intersection	212,389	107,649
KK	MP	?	Traffic Signal at Highway 30/Pittsburg Rd. Intersection	212,389	67,965
LL	MP	?	Traffic Signal at Columbia Blvd./Vernonia Rd. Intersection	212,389	86,136
MM	MP	?	Traffic Signal at Columbia Blvd./12th St. Intersection	212,389	68,544
NN	MP	?	Traffic Signal at Columbia Blvd./6th St. Intersection	212,389	68,544
OO	MP	?	Traffic Signal Coordination on Highway 30	21,239	4,280
PP	MP	?	Achilles Road Sidewalks (Hwy 30 to Millard Rd.)	264,424	145,433
QQ	MP	?	Ross Rd. Sidewalks (Millard to Pittsburg Rd.)	269,734	192,667
				$32,041,726	$13,845,732

Exhibit E
Parks Project List

#	Project Source	Year	Project Description	2000 Project Cost	SDC Eligible Cost
New Parks					
A	Staff	2002	Three-acre park in Area One (1)	$ 144,000	$ 55,380
B	Staff	2005	Three-acre park in Area Two (2)	$ 144,000	$ 55,380
C	Staff	2005	Three-acre park in Area Three (3)	$ 144,000	$ 55,380
D	Staff	2010	Three-acre park in Area Four (4)	$ 144,000	$ 55,380
Park Development					
1	Staff	NA	Campbell Park	$ 388,000	$ 74,077
2	Staff	NA	Civic Pride Park	$ 130,000	$ 26,538
3	Staff	NA	Godfrey Park	$ 58,000	$ 58,000
4	Staff	NA	Heine Huemann Park	$ 190,000	$ 134,923
5	Staff	NA	Little League Park	$ 38,000	$ 20,000
6	Staff	NA	McCormick Park	$ 744,000	$ 614,769
7	Staff	NA	Sand Island Marine Park	$ 387,000	$ -
8	Staff	NA	Columbia View Park	$ 50,000	$ 19,231
9	Staff	NA	Botanical Garden	$ 10,000	$ 3,846
10	Staff	NA	New Riverfront Park	$ 330,000	$ 126,923
11	Staff	NA	New (West Side) 50-acre Park	$ 2,400,000	$ 923,077
				$5,301,000	$2,222,905

NOTES:

(1) Area One includes the area 1/2 mile west of McBride School and along Sykes Road.
(2) Area Two includes the area 1/4 mile north near Hankey Road.
(3) Area Three includes the area between Millard and Maple Roads, just west of Division.
(4) Area Four includes the area just east of Highway 30 and Achilles Road.

EXHIBIT 4

City of Scappoose

Proactive, Efficient and Friendly Service

TRANSPORTATION SYSTEM DEVELOPMENT CHARGES

Methodology Update Report and Rate Study

(as of 05/09/05)

Prepared by Don Ganer

in association with

Kittelson & Associates, Inc.

Chris Brehmer, P.E.
Selman Altun

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Don Ganer & Associates, Inc.

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Methodology Update Report and Rate Study

1.0 INTRODUCTION

The City of Scappoose implemented System Development Charges (SDCs) for Transportation facilities in 1992, based on the expected cost for future street improvements at that time. The City subsequently completed a Transportation Master Plan (Plan) in 1997, and the Scappoose Rail Corridor Study (Study) in 2002. The Plan and Study identify expected transportation needs for the next twenty years. A portion of the facility needs identified in the Plan and Study are for capacity-increasing capital improvements needed to accommodate growth. These needs may be funded with SDC revenues.

This report presents the methodology used to update the City's Transportation SDCs, summarizes the data that is the basis for the SDCs, and documents the calculation of SDC rates. Section 2.0 presents authority and background information including (1) legislative authority for SDCs; (2) an explanation of "improvement fee" and "reimbursement fee" SDCs; (3) requirements and options for credits, exemptions and discounts; (4) guiding concepts for SDCs, and (5) alternative methodology approaches. The methodologies used to develop Transportation SDCs are discussed in Section 3.0; and the Transportation SDC rate calculations are included in Section 4.0.

2.0 AUTHORITY AND BACKGROUND INFORMATION

A. Legislative Authority

The source of authority for the adoption of SDCs is found both in state statute and in the City's own plenary authority to adopt this type of fee. While SDCs have been in use in Oregon since the mid-1970's, State legislation regarding SDCs was not adopted until 1989, when the Oregon Systems Development Act (ORS 223.297 - 223.314) was passed. The purpose of this Act was to "..provide a uniform framework for the imposition of system development charges..". Additions and modifications to the Oregon Systems Development Act have been made in 1993, 1999, 2001, and 2003. Together, these pieces of legislation require local governments that enact SDCs to:

- adopt SDCs by ordinance or resolution;
- develop a methodology outlining how the SDCs were developed;
- adopt a capital improvements program to designate capital improvements that can be funded with "improvement fee" SDC revenues;
- provide credit against the amount of the SDC for the construction of certain "qualified public improvements";
- separately account for and report receipt and expenditure of SDC revenues, and develop procedures for challenging expenditures; and
- use SDC revenues only for capital expenditures (operations and maintenance uses are prohibited).

B. "Improvement fee" and "Reimbursement fee" SDCs

The Oregon Systems Development Act provides for the imposition of two types of SDCs: (1) "improvement fee" SDCs, and (2) "reimbursement fee" SDCs. "Improvement fee" SDCs may be charged for new capital improvements that will increase capacity. Revenues from "improvement fee" SDCs may be spent only on capacity-increasing capital improvements identified in the required capital improvements program that lists each project, and the expected timing, cost, and growth-required percentage of each project. "Reimbursement fee" SDCs may be charged for the costs of existing capital facilities if "excess capacity" is available to accommodate growth. Revenues from "reimbursement fees" may be used on *any* capital improvement project, including major repairs, upgrades, or renovations. Capital improvements to be funded with "reimbursement fee" SDCs do not need to increase capacity, but they must be included in the list of projects to be funded with SDC revenues.

C. Requirements and Options for Credits, Exemptions, and Discounts

(1) Credits

A credit is a reduction in the amount of the SDC for a specific development. The Oregon SDC Act requires that credit be allowed for the construction of a "qualified public improvement" which (1) is required as a condition of development approval, (2) is identified in the City's capital improvements program, and (3) either is not located on or contiguous to property that is the subject of development approval, or is located on or contiguous to such property and is required to be built larger or with greater capacity than is necessary for the particular development project. The credit for a qualified public improvement may only be applied against an SDC for the same type of improvement (e.g., a transportation improvement can only be used for a credit for a transportation SDC), and may be granted only for the cost of that portion of an improvement which exceeds the minimum standard facility size or capacity needed to serve the particular project. For multi-phase projects, any excess credit may be applied against SDCs that accrue in subsequent phases of the original development project.

In addition to these required credits, the City may, if it so chooses, provide a greater credit, establish a system providing for the transferability of credits, provide a credit for a capital improvement not identified in the City's capital improvements program, or provide a share of the cost of an improvement by other means (i.e., partnerships, other City revenues, etc.).

(2) Exemptions

The City may "exempt" certain types of development, such as "affordable housing" from the requirement to pay SDCs. Exemptions reduce SDC revenues and, therefore, increase the amounts that must come from other sources, such as bonds and property taxes.

(3) Discounts

The City may "discount" the amount of the SDC by reducing the portion of growth-required improvements to be funded with SDCs. A discount in the SDC may also be applied on a pro-rata basis to any identified deficiencies to be funded from non-SDC sources. For example, the City may decide to charge new development an SDC rate sufficient to pay for some types of facilities but not for others (i.e., high priority but not medium priority, etc.), or to pay only a percentage (i.e., 80%, 50%, etc.) of identified growth-required costs. The portion of growth-required costs to be funded with SDCs must be identified in the City's capital improvements program.

Because discounts reduce SDC revenues, they increase the amounts that must come from other sources, such as bonds or general fund contributions, in order to achieve or maintain adopted levels of service.

D. Alternative Methodology Approaches

There are three basic approaches used to develop improvement fee SDCs; "standards-driven", "improvements-driven", and "combination/hybrid".

(1) Standards-Driven Approach

The "standards-driven" approach is based on the application of Level of Service (LOS) Standards for facilities such as arterials, collectors, etc. Facility needs are determined by applying the LOS Standards to projected future population and employment, as applicable. SDC-eligible amounts are calculated based on the costs of facilities needed to serve growth. This approach works best where current and planned levels of service have been identified but no specific list of projects is available.

(2) Improvements-Driven Approach

The "improvements-driven" approach is based on a specific list of planned capacity-increasing capital improvements. The portion of each project that is attributable to growth is determined, and the SDC-eligible costs are calculated by dividing the total costs of growth-required projects by the projected increase in population and employment, as applicable. This approach works best where a detailed master plan or project list is available and the benefits of projects can be readily apportioned between growth and current users.

(3) Combination/Hybrid Approach

The combination/hybrid-approach includes elements of both the "improvements-driven" and "standards-driven" approaches. Level of Service standards may be used to create a list of planned capacity-increasing projects, and the growth-required portions of projects can then be used as the basis for determining SDC-eligible costs. This approach works best where Levels of Service have been identified and the benefits of individual projects are not easily apportioned between growth and current users.

3.0 TRANSPORTATION SDC METHODOLOGIES

A. SDC Basis and Justification

The "combination/hybrid" approach has been used to update the City's Transportation SDCs. The updated Transportation SDCs include both "improvement fee" and "reimbursement fee" components. For the "improvement fee" SDC, a list of planned capital improvement projects was developed and analyzed to identify: 1) the capacity-increasing portion, 2) the future growth benefit (versus current capacity needs), and 3) the SDC-eligible portion. For the "reimbursement fee" SDC, recently completed major transportation facility improvements were analyzed to identify: 1) the capacity-increasing portion, 2) the future growth benefit (versus current capacity needs), and 3) the SDC-eligible portion. The resulting SDC-eligible project costs were then divided by the estimated total number of new trip-ends expected during the planning period, yielding the cost per new trip-end.

The methodologies used for the Transportation SDC establish the required connection between a project's impacts and the SDC through the use of trip generation data for specific land uses. Trip Generation (7th Ed., 2003) published by the Institute of Transportation Engineers (ITE) was used to estimate the number of new motor vehicle trips generated by each type of new development.

The SDCs to be paid by new development meet statutory requirements because they are based on the impacts of new trips, and the SDC rates are calculated based on the specific impact (e.g. new trips) a development is expected to have on the City's transportation system.

B. Future Trip-Ends

Using buildable lands inventory information provided by the City of Scappoose and The Benkendorf Associates Corporation, Kittelson & Associates, Inc. performed an analysis to assess the total number of new daily trips that are expected to result from future development during the next twenty years. Trip generation estimates were made for the future development based on the number of buildable acres within the Urban Growth Boundary (UGB). Estimates of daily new vehicle trip ends were calculated based on information contained in the standard reference *Trip Generation, 7th Edition*, published by the Institute of Transportation Engineers (ITE), and the ITE *Traffic Engineering Handbook, 2nd Edition.*

The projected increases in average daily vehicle trip-ends for the buildable lands are shown in Table 3.1, page 7.

TABLE 3.1

PROJECTED GROWTH IN AVERAGE DAILY TRIP-ENDS (2005 – 2025)

Land Use	Buildable Acres	Estimated New Daily Trip-Ends
Low Density Residential	83.55	4,644
Medium Density Residential	80.50	4,292
High Density Residential	9.34	1,287
Manufactured Home Residential	4.14	240
Industrial (including airport area)	27.38	1,640
Commercial	24.73	12,930
TOTAL	**229.64**	**25,033**

C. Capital Improvements Included in the Improvement Fee SDC

The City reviewed all capacity-increasing capital improvements planned for 2005 – 2025. The cost for all projects totaled $54,692,500, and the SDC-eligible portion of these costs totaled $23,598,000. The City Council determined that the SDC rates required to fund all eligible projects would be excessive. Projects requiring improvement fee SDC revenues totaling $5,674,403 (24.0% of the total SDC eligible costs) were selected. The list of selected projects is shown in Table 3.2, page 9. The following information is provided for each project:

1) Project Map Number (Project Number) – Project number on the City's transportation project map;

2) Project Name and Location (from – to) – Project street name and extents (from – to);

3) Project Description - a brief description of the project;

4) Project Timing – Project timing priority (short-range or intermediate);

5) Estimated Total Project Cost - the total estimated cost for the project (2005 dollars);

6) Portion Attributable to Growth (%) - the estimated capacity-increasing portion of the project available to meet growth needs; and

7) Cost Attributable to Growth (SDC-Eligible Amount) - the net portion of the total project cost that benefits growth.

TABLE 3.2
SCAPPOOSE TRANSPORTATION SDC CIP PROJECTS

(1) Project Map Number	(2) Project Name and Location (From - To)	(3) Project Description	(4) Project Timing	(5) Total Project Cost Estimate	(6) Portion Attributable to Growth	(7) Cost Attributable to Growth (SDC-Eligible)
6	Havlik Drive Crossing & Extension - Highway 30 to North Park Drive	Construct new 44-foot-wide urban collector cross section	Short-range	$2,064,403	100.0%	$2,064,403
4	J.P. West Road - Highway 30 to Scappoose Community Park Access	Widen to 36-foot-wide urban cross section	Short-range	$1,520,000	40.7%	$619,000
3	Maple Street - First Street W. to Fourth Street W.	Widen to 44-foot-wide urban cross section	Short-range	$482,000	38.7%	$187,000
31	Elm Avenue - Sixth Street E. to Tenth Street E.	Construct new 36-foot-wide urban cross section	Short-range	$750,000	100.0%	$750,000
32	Ninth Street E. - Tyler Street to E. Columbia Avenue	Construct new 32-foot-wide urban cross section	Short-range	$535,000	100.0%	$535,000
10	First Street W. - Maple Street to J.P. West Road	Improve to urban village standards	Short-range	$38,500	38.7%	$15,000
11	First Street W. - J.P. West Road to Columbia Avenue W.	Improve to urban village standards	Short-range	$220,000	38.7%	$85,000
12	First Street W. - Columbia Avenue W. to Williams Street	Improve to urban village standards	Short-range	$495,000	38.7%	$192,000
13	First Street W. - Williams Street to E.J. Smith Road	Improve to urban village standards	Short-range	$220,000	38.7%	$85,000
22	Old Portland Road Realignment - Highway 30 to Old Portland Road Extension	Construct new 44-foot-wide urban collector cross section	Short-range	$685,000	100.0%	$685,000
2	Maple Street - Highway 30 to First Street W.	Provide curb, gutter, and sidewalks on both sides	Short-range	$51,000	38.7%	$20,000
17	Maple Street E. - Highway 30 to Fourth Street E.	Widen to 36-foot-wide urban cross section	Short-range	$765,000	57.1%	$437,000
TOTAL COST OF PROJECTS				**$7,825,903**		**$5,674,403**

D. Capital Improvements Included in the Reimbursement Fee SDC

The City's net cost for excess capacity available to serve growth may be used as the basis for a reimbursement fee. The reimbursable amount may not include gifts or grants from federal or state government or private persons. The City recently completed one major capacity-increasing capital improvement that has excess capacity available to serve growth. The following information is provided for the project:

1) Project Name and Location (from – to) – Crown Zellerbach Road from Highway 30 to West Lane Road;

2) Project Description – widen to industrial arterial standard;

3) Estimated Total Project Cost - $1.7M (2005 dollars);

4) Portion Attributable to Growth (%) – 96%;

5) Cost Attributable to Growth - $1,632,000;

6) Contributions from gifts or grants from federal or state government or private persons - $1,007,000; and

7) Reimbursement Fee SDC-Eligible Amount - the net portion of the total project cost that may be collected through a reimbursement fee SDC - $665,280 [=($1,700,000 – $1,007,000) X 96%].

4.0 CALCULATION OF TRANSPORTATION SDC RATES

The Transportation SDC rates are calculated using a series of formulas which:

1. identify the number of new trips for each type of land use,
2. adjust trip rates to allow for differences in trip lengths,
3. calculate the improvement fee per trip end and unit of development
4. calculate the reimbursement fee per trip end and unit of development,
5. calculate the compliance cost per trip end and unit of development, and
6. calculate the total transportation SDC per unit of development.

A. Formula 1: New Trips Per Unit of Development

The number of new trips generated per day is calculated for each type of land use using the following formula:

1.	Trip Rate	x	Percent New Trips	=	New Trips Per Unit

The primary data source for trip rates included in this methodology is *Trip Generation, 7th Edition*, published by the Institute of Transportation Engineers (ITE). *Trip Generation* contains trip rates for different land uses based on trip generation studies conducted nationwide, and provides the base data of unadjusted counts of trips generated by various types of land use. The trip rates included in *Trip Generation* are based on all traffic entering or leaving a primary location, and do not account for trips by traffic that is passing by and interrupts a "primary" trip between two other locations. These "pass-by" trips are not "new" because they would occur regardless of development activity. "New" trips are often based on the assumption that all trips from residential land uses are new trips (therefore, percentage = 100%), and all other land uses are evaluated to reflect the percentage of their trips that are "new" versus the remainder (which are "pass-by" trips). No land use category has greater than 100% new trips, but some categories may have less (i.e., some commercial categories have as few as 34% new trips). The percentages used to account for pass-by trips in this methodology are based on pass-by data included in the ITE *Trip Generation Handbook, 2nd Edition* (2004).

Table 4.1 (pages 12 - 16) lists the number of new trips generated for each land use category, using Formula 1. Column 1 lists land use categories and their ITE code numbers. Column 2 contains either the Weekday Average or the adjusted Weekday PM Peak Trip Rate from *Trip Generation*. Column 3 identifies the percentage of trips that are new, as opposed to pass-by trips. (NOTE: Because of some small sample sizes or lack of studies in *Trip Generation*, there may be land use categories that do not include trip rates or a number of net new trips generated. For these categories, the trip generation rate for the land use that is the most similar to the actual land use should be used to determine the Transportation SDC.)

TABLE 4.1

NEW TRIPS PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Weekday Average Trip Rate	% New Trips	New Trips	Unit *
RESIDENTIAL				
210 Single Family Detached	9.57	100%	9.57	/dwelling unit
220 Apartment	6.72	100%	6.72	/dwelling unit
230 Residential Condominium/Townhouse	5.86	100%	5.86	/dwelling unit
240 Manufactured Housing (in Park)	4.99	100%	4.99	/dwelling unit
254 Assisted Living	2.74	100%	2.74	/bed
255 Continuing Care Retirement	2.81	100%	2.81	/unit
260 Recreation Home	3.16	100%	3.16	/dwelling unit
RECREATIONAL				
411 City Park	1.59	100%	1.59	/acre
412 County Park	2.28	100%	2.28	/acre
416 Campground/RV Park **	4.10	100%	4.10	/camp site
420 Marina	2.96	100%	2.96	/berth
430 Golf Course	35.74	100%	35.74	/hole
432 Golf Driving Range **	12.50	100%	12.50	/tee
435 Multipurpose Recreation/Arcade **	33.50	100%	33.50	/T.S.F.G.F.A.
437 Bowling Alley	33.33	100%	33.33	/lane
443 Movie Theater w/out matinee	220.00	100%	220.00	/screen
444 Movie Theater w/matinee **	202.20	100%	202.20	/screen
445 Multiplex Movie Theater (10+ screens) **	136.40	100%	136.40	/screen
473 Casino/Video Poker/Lottery **	134.30	100%	134.30	/T.S.F.G.F.A.
480 Amusement/Theme Park	75.76	100%	75.76	/acre
488 Soccer Complex	71.33	100%	71.33	/field
492 Racquet/Tennis Club	38.70	100%	38.70	/court
492 Health/Fitness Club	32.93	100%	32.93	/T.S.F.G.F.A.
495 Recreation/Community Center	22.88	100%	22.88	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:

T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area

T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area

V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.1

NEW TRIPS PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Weekday Average Trip Rate	% New Trips	New Trips	Unit *
INSTITUTIONAL/MEDICAL				
501 Military Base	1.78	100%	1.78	/employee
520 Elementary School (Public)	1.29	100%	1.29	/student
522 Middle/Junior High School (Public)	1.62	100%	1.62	/student
530 High School (Public)	1.71	100%	1.71	/student
536 Private School (K - 12)	2.48	100%	2.48	/student
540 Junior/Community College	1.20	100%	1.20	/student
550 University/College	2.38	100%	2.38	/student
560 Church	9.11	100%	9.11	/T.S.F.G.F.A.
565 Day Care Center/Preschool	4.48	100%	4.48	/student
590 Library	54.00	100%	54.00	/T.S.F.G.F.A.
610 Hospital	11.81	100%	11.81	/bed
620 Nursing Home	2.37	100%	2.37	/bed
630 Clinic	31.45	100%	31.45	/T.S.F.G.F.A.
COMMERCIAL/SERVICES				
310 Hotel/Motel	8.92	100%	8.92	/room
812 Building Materials/Lumber	45.16	52%	23.48	/T.S.F.G.F.A.
813 Free-Standing Discount Superstore With Groceries	49.12	72%	35.37	/T.S.F.G.F.A.
814 Specialty Retail Center	44.32	66%	29.25	/T.S.F.G.L.A.
815 Free-Standing Discount Store Without Groceries	56.02	83%	46.50	/T.S.F.G.F.A.
816 Hardware/Paint Stores	51.29	74%	37.95	/T.S.F.G.F.A.
817 Nursery/Garden Center	36.08	66%	23.81	/T.S.F.G.F.A.
820 Shopping Center	42.94	66%	28.34	/T.S.F.G.L.A.
823 Factory Outlet Center	26.59	66%	17.55	/T.S.F.G.F.A.

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TABLE 4.1

NEW TRIPS PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Weekday Average Trip Rate	% New Trips	New Trips	Unit *
COMMERCIAL/SERVICES (continued)				
841 New Car Sales	33.34	66%	22.00	/T.S.F.G.F.A.
843 Automobile Parts Sales	61.91	57%	35.29	/T.S.F.G.F.A.
849 Tire Superstore	20.36	72%	14.66	/T.S.F.G.F.A.
850 Supermarket	102.24	64%	65.43	/T.S.F.G.F.A.
851 Convenience Market (24 hour)	737.99	39%	287.82	/T.S.F.G.F.A.
853 Convenience Market With Fuel Pump	542.60	34%	184.48	/V.F.P.
860 Wholesale Market	6.73	83%	5.59	/T.S.F.G.F.A.
861 Discount Club	41.80	83%	34.69	/T.S.F.G.F.A.
862 Home Improvement Superstore	29.80	52%	15.50	/T.S.F.G.F.A.
863 Electronics Superstore	45.04	60%	27.02	/T.S.F.G.F.A.
867 Office Supply Superstore **	34.00	66%	22.44	/T.S.F.G.F.A.
880 Pharmacy/Drugstore				
Without Drive-Thru Window	90.06	47%	42.33	/T.S.F.G.F.A.
881 Pharmacy/Drugstore				
With Drive-Thru Window	88.16	51%	44.96	/T.S.F.G.F.A.
890 Furniture Store	5.06	47%	2.38	/T.S.F.G.F.A.
896 Video Rental Store **	316.00	50%	158.00	/T.S.F.G.F.A.
911 Bank/Savings: Walk-in	156.48	83%	129.88	/T.S.F.G.F.A.
912 Bank/Savings: Drive-In	246.49	53%	130.64	/T.S.F.G.F.A.

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TABLE 4.1

NEW TRIPS PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Weekday Average Trip Rate	% New Trips	New Trips	Unit *
COMMERCIAL/SERVICES (continued)				
931 Quality Restaurant (not a chain)	89.95	56%	50.37	/T.S.F.G.F.A.
932 High Turnover, Sit-Down Restaurant (chain or stand alone)	127.15	57%	72.48	/T.S.F.G.F.A.
933 Fast Food Restaurant (No Drive-Thru)	716.00	50%	358.00	/T.S.F.G.F.A.
934 Fast Food Restaurant (With Drive-Thru)	496.12	50%	248.06	/T.S.F.G.F.A.
936 Drinking Place/Bar **	113.40	50%	56.70	/T.S.F.G.F.A.
941 Quick Lubrication Vehicle Shop	40.00	58%	23.20	/Service Stall
942 Automobile Care Center **	40.10	58%	23.26	/T.S.F.G.L.A.
944 Gasoline/Service Station (no Market or Car Wash)	168.56	58%	97.76	/V.F.P.
945 Gasoline/Service Station (With Convenience Market)	162.78	44%	71.62	/V.F.P.
946 Gasoline/Service Station (With Convenience Market and Car Wash)	152.84	44%	67.25	/V.F.P.
OFFICE				
710 General Office Building	11.01	100%	11.01	/T.S.F.G.F.A.
714 Corporate Headquarters Building	7.98	100%	7.98	/T.S.F.G.F.A.
715 Single Tenant Office Building	11.57	100%	11.57	/T.S.F.G.F.A.
720 Medical-Dental Office Building	36.13	100%	36.13	/T.S.F.G.F.A.
731 State Motor Vehicles Dept.	166.02	100%	166.02	/T.S.F.G.F.A.
732 U.S. Post Office	108.19	83%	89.80	/T.S.F.G.F.A.
750 Office Park	11.42	100%	11.42	/T.S.F.G.F.A.
760 Research and Development Center	8.11	100%	8.11	/T.S.F.G.F.A.
770 Business Park	12.76	100%	12.76	/T.S.F.G.F.A.

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TABLE 4.1

NEW TRIPS PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Weekday Average Trip Rate	% New Trips	New Trips	Unit *
PORT/INDUSTRIAL				
030 Truck Terminals	9.85	100%	9.85	/T.S.F.G.F.A.
090 Park and Ride Lot With Bus Service	4.50	100%	4.50	/Parking Space
093 Light Rail Transit Station With Parking	2.51	100%	2.51	/Parking Space
110 General Light Industrial	6.97	100%	6.97	/T.S.F.G.F.A.
120 General Heavy Industrial	1.50	100%	1.50	/T.S.F.G.F.A.
130 Industrial Park	6.96	100%	6.96	/T.S.F.G.F.A.
140 Manufacturing	3.82	100%	3.82	/T.S.F.G.F.A.
150 Warehouse	4.96	100%	4.96	/T.S.F.G.F.A.
151 Mini-Warehouse	2.50	100%	2.50	/T.S.F.G.F.A.
170 Utilities**	7.60	83%	6.31	/T.S.F.G.F.A.

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B. Formula 2: Trip Length Adjustment

The ITE trip generation rates do not account for differences in the lengths of trips for different types of development. Because longer trips have a relatively greater impact on the road system than do shorter trips, an adjustment factor is needed to account for differences in trip lengths relative to the length of an "average" trip. The net adjusted trips generated per day is determined for each type of land use by multiplying the number of new trips (from Formula 1) by the trip length factor for each type of land use:

2.	New Trips	X	Trip Length Factor	=	Net Adjusted Trips Per Day

Trip length data from surveys conducted for the U.S. Department of Transportation and published in the "National Personal Transportation Study" (1984) were used in developing the Trip Length Factors, as were concepts and methods recommended by James C. Nicholas, in "The Calculation of Proportionate-Share Impact Fees" (American Planning Association, 1988), and "Development Impact Fee Policy and Administration", (American Planning Association, 1990).

Table 4.2 (pages 18 - 24) lists the net adjusted trips per day for each type of development, as calculated using Formula 2. Column 1 repeats the ITE codes and land use categories, and Column 2 repeats the new trips per day from the last column of Table 4.1. Column 3 presents the trip length factor for each type of land use. As the result of multiplying the number of trips (Column 2) by the trip length factor (Column 3), Column 4 displays the net adjusted trips per day for each land use category.

TABLE 4.2

NET ADJUSTED TRIPS PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	New Trips	Trip Length Factor	Net Adjusted Trips	Unit *
RESIDENTIAL				
210 Single Family Detached	9.57	1.00	9.57	/dwelling unit
220 Apartment	6.72	1.00	6.72	/dwelling unit
230 Residential Condominium/Townhouse	5.86	1.00	5.86	/dwelling unit
240 Manufactured Housing (in Park)	4.99	1.00	4.99	/dwelling unit
254 Assisted Living	2.74	1.00	2.74	/bed
255 Continuing Care Retirement	2.81	1.00	2.81	/unit
260 Recreation Home	3.16	1.00	3.16	/dwelling unit
RECREATIONAL				
411 City Park	1.59	1.11	1.76	/acre
412 County Park	2.28	1.11	2.52	/acre
416 Campground/RV Park **	4.10	1.11	4.54	/camp site
420 Marina	2.96	1.11	3.27	/berth
430 Golf Course	35.74	1.11	39.53	/hole
432 Golf Driving Range **	12.50	1.11	13.83	/tee
435 Multipurpose Recreation/Arcade **	33.50	1.11	37.06	/T.S.F.G.F.A.
437 Bowling Alley	33.33	1.11	36.87	/lane
443 Movie Theater w/out matinee	220.00	1.11	243.36	/screen
444 Movie Theater w/matinee **	202.20	1.11	223.67	/screen
445 Multiplex Movie Theater (10+ screens) **	136.40	1.11	150.88	/screen
473 Casino/Video Poker/Lottery **	134.30	1.11	148.56	/T.S.F.G.F.A.
480 Amusement/Theme Park	75.76	1.11	83.80	/acre
488 Soccer Complex	71.33	1.11	78.90	/field
492 Racquet/Tennis Club	38.70	1.11	42.81	/court
492 Health/Fitness Club	32.93	1.11	36.43	/T.S.F.G.F.A.
495 Recreation/Community Center	22.88	1.50	34.32	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:

T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area

T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area

V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.2

NET ADJUSTED TRIPS PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	New Trips	Trip Length Factor	Net Adjusted Trips	Unit *
INSTITUTIONAL/MEDICAL				
501 Military Base	1.78	1.06	1.89	/employee
520 Elementary School (Public)	1.29	0.40	0.51	/student
522 Middle/Junior High School (Public)	1.62	0.40	0.65	/student
530 High School (Public)	1.71	0.75	1.28	/student
536 Private School (K - 12)	2.48	0.75	1.86	/student
540 Junior/Community College	1.20	0.75	0.90	/student
550 University/College	2.38	0.75	1.78	/student
560 Church	9.11	0.75	6.83	/T.S.F.G.F.A.
565 Day Care Center/Preschool	4.48	0.40	1.79	/student
590 Library	54.00	0.40	21.54	/T.S.F.G.F.A.
610 Hospital	11.81	1.06	12.52	/bed
620 Nursing Home	2.37	1.06	2.51	/bed
630 Clinic	31.45	1.06	33.33	/T.S.F.G.F.A.
COMMERCIAL/SERVICES				
310 Hotel/Motel	8.92	1.24	11.09	/room
812 Building Materials/Lumber	23.48	0.84	19.81	/T.S.F.G.F.A.
813 Free-Standing Discount Superstore				
With Groceries	35.37	0.84	29.84	/T.S.F.G.F.A.
814 Specialty Retail Center	29.25	0.84	24.68	/T.S.F.G.L.A.
815 Free-Standing Discount Store				
Without Groceries	46.50	0.84	39.23	/T.S.F.G.F.A.
816 Hardware/Paint Stores	37.95	0.84	32.02	/T.S.F.G.F.A.
817 Nursery/Garden Center	23.81	0.84	20.09	/T.S.F.G.F.A.
820 Shopping Center	28.34	0.84	23.91	/T.S.F.G.L.A.
823 Factory Outlet Center	17.55	0.84	14.81	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.2

NET ADJUSTED TRIPS PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	New Trips	Trip Length Factor	Net Adjusted Trips	Unit *
COMMERCIAL/SERVICES (continued)				
841 New Car Sales	22.00	0.84	18.56	/T.S.F.G.F.A.
843 Automobile Parts Sales	35.29	0.84	29.77	/T.S.F.G.F.A.
849 Tire Superstore	14.66	0.84	12.37	/T.S.F.G.F.A.
850 Supermarket	65.43	0.84	55.20	/T.S.F.G.F.A.
851 Convenience Market (24 hour)	287.82	0.42	121.68	/T.S.F.G.F.A.
853 Convenience Market With Fuel Pump	184.48	0.42	78.00	/V.F.P.
860 Wholesale Market	5.59	0.84	4.71	/T.S.F.G.F.A.
861 Discount Club	34.69	0.84	29.27	/T.S.F.G.F.A.
862 Home Improvement Superstore	15.50	0.84	13.07	/T.S.F.G.F.A.
863 Electronics Superstore	27.02	0.84	22.80	/T.S.F.G.F.A.
867 Office Supply Superstore **	22.44	0.84	18.93	/T.S.F.G.F.A.
880 Pharmacy/Drugstore				
Without Drive-Thru Window	42.33	0.84	35.71	/T.S.F.G.F.A.
881 Pharmacy/Drugstore				
With Drive-Thru Window	44.96	0.84	37.93	/T.S.F.G.F.A.
890 Furniture Store	2.38	0.84	2.01	/T.S.F.G.F.A.
896 Video Rental Store **	158.00	0.84	133.29	/T.S.F.G.F.A.
911 Bank/Savings: Walk-in	129.88	0.84	109.57	/T.S.F.G.F.A.
912 Bank/Savings: Drive-In	130.64	0.84	110.21	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.2

NET ADJUSTED TRIPS PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	New Trips	Trip Length Factor	Net Adjusted Trips	Unit *
COMMERCIAL/SERVICES (continued)				
931 Quality Restaurant (not a chain)	50.37	1.00	50.47	/T.S.F.G.F.A.
932 High Turnover, Sit-Down Restaurant (chain or stand alone)	72.48	0.50	36.24	/T.S.F.G.F.A.
933 Fast Food Restaurant (No Drive-Thru)	358.00	0.50	179.00	/T.S.F.G.F.A.
934 Fast Food Restaurant (With Drive-Thru)	248.06	0.50	124.03	/T.S.F.G.F.A.
936 Drinking Place/Bar **	56.70	0.50	28.35	/T.S.F.G.F.A.
941 Quick Lubrication Vehicle Shop	23.20	0.84	19.57	/Service Stall
942 Automobile Care Center **	23.26	0.84	19.62	/T.S.F.G.L.A.
944 Gasoline/Service Station (no Market or Car Wash)	97.76	0.42	41.33	/V.F.P.
945 Gasoline/Service Station (With Convenience Market)	71.62	0.42	30.28	/V.F.P.
946 Gasoline/Service Station (With Convenience Market and Car Wash)	67.25	0.42	28.43	/V.F.P.
OFFICE				
710 General Office Building	11.01	1.06	11.67	/T.S.F.G.F.A.
714 Corporate Headquarters Building	7.98	1.06	8.46	/T.S.F.G.F.A.
715 Single Tenant Office Building	11.57	1.06	12.26	/T.S.F.G.F.A.
720 Medical-Dental Office Building	36.13	1.06	38.29	/T.S.F.G.F.A.
731 State Motor Vehicles Dept.	166.02	1.06	175.96	/T.S.F.G.F.A.
732 U.S. Post Office	89.80	1.06	95.17	/T.S.F.G.F.A.
750 Office Park	11.42	1.06	12.10	/T.S.F.G.F.A.
760 Research and Development Center	8.11	1.06	8.60	/T.S.F.G.F.A.
770 Business Park	12.76	1.06	13.52	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.2 NET ADJUSTED TRIPS PER UNIT OF DEVELOPMENT				page 5 of 5
ITE LAND USE CODE/CATEGORY	New Trips	Trip Length Factor	Net Adjusted Trips	Unit *
PORT/INDUSTRIAL				
030 Truck Terminals	9.85	1.06	10.44	/T.S.F.G.F.A.
090 Park and Ride Lot With Bus Service	4.50	0.84	3.80	/Parking Space
093 Light Rail Transit Station With Parking	2.51	0.84	2.12	/Parking Space
110 General Light Industrial	6.97	1.06	7.39	/T.S.F.G.F.A.
120 General Heavy Industrial	1.50	1.06	1.59	/T.S.F.G.F.A.
130 Industrial Park	6.96	1.06	7.38	/T.S.F.G.F.A.
140 Manufacturing	3.82	1.06	4.05	/T.S.F.G.F.A.
150 Warehouse	4.96	1.06	5.26	/T.S.F.G.F.A.
151 Mini-Warehouse	2.50	1.06	2.65	/T.S.F.G.F.A.
170 Utilities**	6.31	1.06	6.69	/T.S.F.G.F.A.
* Abbreviations used in the "Unit" column:				
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area				
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area				
V.F.P. = Vehicle Fueling Position				
** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.				

C. Formula 3: Improvement Fee Per Trip-End

The capital improvements included in Table 3.2, page 8 are selected transportation system capacity needs identified for inclusion in the improvement fee transportation SDC. To calculate the Improvement Fee Per Trip End, the SDC-eligible amount from Table 3.2 is divided by the total average number of new trip-ends from Table 3.1, page 7, as shown in the following formula:

3.	Improvement Fee SDC-Eligible Costs	÷	Total New Daily Trip-Ends	=	Improvement Fee Per Trip-End

Calculation of the Improvement Fee Per Trip-End is shown in Table 4.3, page 23.

TABLE 4.3

IMPROVEMENT FEE PER TRIP END

Improvement Fee SDC-Eligible Costs		Total New Daily Trip-Ends		Improvement Fee Per Trip-End
$5,674,403	÷	25,033	=	$227

D. Formula 4: Improvement Fee Per Unit (by Type of Land Use)

The improvement fee per unit of development is calculated for each type of land use by multiplying the net adjusted number of trips for each land use (from Table 4.2) by the improvement fee per new trip-end (from Table 4.3, above).

			Improvement		Improvement
4.	Net Adjusted Trips Per Unit	X	Fee Per Trip-End	=	Fee Per Unit

Table 4.4 (pages 24 - 28) displays the improvement fee per unit for each land use category. Column 1 repeats the ITE land use codes and categories, and Column 2 repeats the net adjusted trips for each land use category (from Table 4.2). The improvement fee per trip-end is shown in Column 3. The Improvement Fee Per Unit is calculated by multiplying the net adjusted trips for each land use category (Column 2) by the improvement fee per trip-end (Column 3).

TABLE 4.6

IMPROVEMENT FEE PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Net Adjusted Trips	Improvement Fee Per Trip-End	Impr. Fee Per Unit	Unit *
RESIDENTIAL				
210 Single Family Detached	9.57	$227	$2,172	/dwelling unit
220 Apartment	6.72	$227	$1,525	/dwelling unit
230 Residential Condominium/Townhouse	5.86	$227	$1,330	/dwelling unit
240 Manufactured Housing (in Park)	4.99	$227	$1,133	/dwelling unit
254 Assisted Living	2.74	$227	$622	/bed
255 Continuing Care Retirement	2.81	$227	$638	/unit
260 Recreation Home	3.16	$227	$717	/dwelling unit
RECREATIONAL				
411 City Park	1.76	$227	$399	/acre
412 County Park	2.52	$227	$573	/acre
416 Campground/RV Park **	4.54	$227	$1,030	/camp site
420 Marina	3.27	$227	$743	/berth
430 Golf Course	39.53	$227	$8,974	/hole
432 Golf Driving Range **	13.83	$227	$3,139	/tee
435 Multipurpose Recreation/Arcade **	37.06	$227	$8,412	/T.S.F.G.F.A.
437 Bowling Alley	36.87	$227	$8,369	/lane
443 Movie Theater w/out matinee	243.36	$227	$55,243	/screen
444 Movie Theater w/matinee **	418.47	$227	$94,992	/screen
445 Multiplex Movie Theater (10+ screens) **	285.84	$227	$64,885	/screen
473 Casino/Video Poker/Lottery **	148.56	$227	$33,723	/T.S.F.G.F.A.
480 Amusement/Theme Park	83.80	$227	$19,024	/acre
488 Soccer Complex	78.90	$227	$17,911	/field
492 Racquet/Tennis Club	42.81	$227	$9,718	/court
492 Health/Fitness Club	36.43	$227	$8,269	/T.S.F.G.F.A.
495 Recreation/Community Center	34.32	$227	$7,791	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:

T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area

T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area

V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.6

IMPROVEMENT FEE PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Net Adjusted Trips	Improvement Fee Per Trip-End	Impr. Fee Per Unit	Unit *
INSTITUTIONAL/MEDICAL				
501 Military Base	1.89	$227	$428	/employee
520 Elementary School (Public)	0.51	$227	$117	/student
522 Middle/Junior High School (Public)	0.65	$227	$147	/student
530 High School (Public)	1.28	$227	$291	/student
536 Private School (K - 12)	1.86	$227	$422	/student
540 Junior/Community College	0.90	$227	$203	/student
550 University/College	1.78	$227	$403	/student
560 Church	6.83	$227	$1,551	/T.S.F.G.F.A.
565 Day Care Center/Preschool	1.79	$227	$406	/student
590 Library	21.54	$227	$4,891	/T.S.F.G.F.A.
610 Hospital	12.52	$227	$2,841	/bed
620 Nursing Home	2.51	$227	$570	/bed
630 Clinic	33.33	$227	$7,566	/T.S.F.G.F.A.
COMMERCIAL/SERVICES				
310 Hotel/Motel	11.09	$227	$2,517	/room
812 Building Materials/Lumber	19.81	$227	$4,497	/T.S.F.G.F.A.
813 Free-Standing Discount Superstore				
With Groceries	29.84	$227	$6,773	/T.S.F.G.F.A.
814 Specialty Retail Center	24.68	$227	$5,602	/T.S.F.G.L.A.
815 Free-Standing Discount Store				
Without Groceries	39.23	$227	$8,904	/T.S.F.G.F.A.
816 Hardware/Paint Stores	32.02	$227	$7,268	/T.S.F.G.F.A.
817 Nursery/Garden Center	20.09	$227	$4,560	/T.S.F.G.F.A.
820 Shopping Center	23.91	$227	$5,427	/T.S.F.G.L.A.
823 Factory Outlet Center	14.81	$227	$3,361	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.6

IMPROVEMENT FEE PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Net Adjusted Trips	Improvement Fee Per Trip-End	Impr. Fee Per Unit	Unit *
COMMERCIAL/SERVICES (continued)				
841 New Car Sales	18.56	$227	$4,214	/T.S.F.G.F.A.
843 Automobile Parts Sales	29.77	$227	$6,758	/T.S.F.G.F.A.
849 Tire Superstore	12.37	$227	$2,807	/T.S.F.G.F.A.
850 Supermarket	55.20	$227	$12,531	/T.S.F.G.F.A.
851 Convenience Market (24 hour)	121.68	$227	$27,622	/T.S.F.G.F.A.
853 Convenience Market With Fuel Pump	78.00	$227	$17,705	/V.F.P.
860 Wholesale Market	4.71	$227	$1,070	/T.S.F.G.F.A.
861 Discount Club	29.27	$227	$6,644	/T.S.F.G.F.A.
862 Home Improvement Superstore	13.07	$227	$2,968	/T.S.F.G.F.A.
863 Electronics Superstore	22.80	$227	$5,175	/T.S.F.G.F.A.
867 Office Supply Superstore **	18.93	$227	$4,297	/T.S.F.G.F.A.
880 Pharmacy/Drugstore				
Without Drive-Thru Window	35.71	$227	$8,106	/T.S.F.G.F.A.
881 Pharmacy/Drugstore				
With Drive-Thru Window	37.93	$227	$8,610	/T.S.F.G.F.A.
890 Furniture Store	2.01	$227	$455	/T.S.F.G.F.A.
896 Video Rental Store **	133.29	$227	$30,258	/T.S.F.G.F.A.
911 Bank/Savings: Walk-in	109.57	$227	$24,872	/T.S.F.G.F.A.
912 Bank/Savings: Drive-In	110.21	$227	$25,018	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.6

IMPROVEMENT FEE PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Net Adjusted Trips	Improvement Fee Per Trip-End	Impr. Fee Per Unit	Unit *
COMMERCIAL/SERVICES (continued)				
931 Quality Restaurant (not a chain)	50.47	$227	$11,457	/T.S.F.G.F.A.
932 High Turnover, Sit-Down		$227		
Restaurant (chain or stand alone)	36.24	$227	$8,226	/T.S.F.G.F.A.
933 Fast Food Restaurant (No Drive-Thru)	179.00	$227	$40,633	/T.S.F.G.F.A.
934 Fast Food Restaurant (With Drive-Thru)	124.03	$227	$28,155	/T.S.F.G.F.A.
936 Drinking Place/Bar **	28.35	$227	$6,435	/T.S.F.G.F.A.
941 Quick Lubrication Vehicle Shop	19.57	$227	$4,443	/Service Stall
942 Automobile Care Center **	19.62	$227	$4,454	/T.S.F.G.L.A.
944 Gasoline/Service Station				
(no Market or Car Wash)	41.33	$227	$9,383	/V.F.P.
945 Gasoline/Service Station				
(With Convenience Market)	30.28	$227	$6,874	/V.F.P.
946 Gasoline/Service Station				
(With Convenience Market and Car Wash)	28.43	$227	$6,454	/V.F.P.
OFFICE				
710 General Office Building	11.67	$227	$2,649	/T.S.F.G.F.A.
714 Corporate Headquarters Building	8.46	$227	$1,920	/T.S.F.G.F.A.
715 Single Tenant Office Building	12.26	$227	$2,784	/T.S.F.G.F.A.
720 Medical-Dental Office Building	38.29	$227	$8,692	/T.S.F.G.F.A.
731 State Motor Vehicles Dept.	175.96	$227	$39,942	/T.S.F.G.F.A.
732 U.S. Post Office	95.17	$227	$21,604	/T.S.F.G.F.A.
750 Office Park	12.10	$227	$2,747	/T.S.F.G.F.A.
760 Research and Development Center	8.60	$227	$1,951	/T.S.F.G.F.A.
770 Business Park	13.52	$227	$3,070	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.6

IMPROVEMENT FEE PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Net Adjusted Trips	Improvement Fee Per Trip-End	Impr. Fee Per Unit	Unit *
PORT/INDUSTRIAL				
030 Truck Terminals	10.44	$227	$2,370	/T.S.F.G.F.A.
090 Park and Ride Lot With Bus Service	3.80	$227	$862	/Parking Space
093 Light Rail Transit Station With Parking	2.12	$227	$481	/Parking Space
110 General Light Industrial	7.39	$227	$1,677	/T.S.F.G.F.A.
120 General Heavy Industrial	1.59	$227	$361	/T.S.F.G.F.A.
130 Industrial Park	7.38	$227	$1,674	/T.S.F.G.F.A.
140 Manufacturing	4.05	$227	$919	/T.S.F.G.F.A.
150 Warehouse	5.26	$227	$1,193	/T.S.F.G.F.A.
151 Mini-Warehouse	2.65	$227	$601	/T.S.F.G.F.A.
170 Utilities**	6.69	$227	$1,518	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

E. Formula 5: Reimbursement Fee Per Trip-End

One capital improvement is identified on page 9 for inclusion in the reimbursement fee transportation SDC. To calculate the Reimbursement Fee Per Trip End, the SDC-eligible amount identified on page 9 is divided by the total average number of new trip-ends from Table 3.1, page 7, as shown in the following formula:

5.	Reimbursement Fee SDC-Eligible Costs	÷	Total New Daily Trip-Ends	=	Reimbursement Fee Per Trip-End

Calculation of the Reimbursement Fee Per Trip-End is shown in Table 4.5, page 29.

TABLE 4.5

REIMBURSEMENT FEE PER TRIP END

Reimbursement Fee SDC-Eligible Costs		Total New Daily Trip-Ends		Reimbursement Fee Per Trip-End
$665,280	÷	25,033	=	$27

F. Formula 6: Reimbursement Fee Per Unit (by Type of Land Use)

The reimbursement fee per unit of development is calculated for each type of land use by multiplying the net adjusted number of trips for each land use (from Table 4.2) by the reimbursement fee per new trip-end (from Table 4.5, above).

			Reimbursement		Reimbursement
6.	Net Adjusted Trips Per Unit	X	Fee Per Trip-End	=	Fee Per Unit

Table 4.6 (pages 30 - 34) displays the reimbursement fee per unit for each land use category. Column 1 repeats the ITE land use codes and categories, and Column 2 repeats the net adjusted trips for each land use category (from Table 4.2). The reimbursement fee per trip-end is shown in Column 3. The Reimbursement Fee Per Unit is calculated by multiplying the net adjusted trips for each land use category (Column 2) by the reimbursement fee per trip-end (Column 3).

TABLE 4.6

REIMBURSEMENT FEE PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Net Adjusted Trips	Reimbursement Fee Per Trip-End	Reimb. Fee Per Unit	Unit *
RESIDENTIAL				
210 Single Family Detached	9.57	$27	$258	/dwelling unit
220 Apartment	6.72	$27	$181	/dwelling unit
230 Residential Condominium/Townhouse	5.86	$27	$158	/dwelling unit
240 Manufactured Housing (in Park)	4.99	$27	$135	/dwelling unit
254 Assisted Living	2.74	$27	$74	/bed
255 Continuing Care Retirement	2.81	$27	$76	/unit
260 Recreation Home	3.16	$27	$85	/dwelling unit
RECREATIONAL				
411 City Park	1.76	$27	$47	/acre
412 County Park	2.52	$27	$68	/acre
416 Campground/RV Park **	4.54	$27	$122	/camp site
420 Marina	3.27	$27	$88	/berth
430 Golf Course	39.53	$27	$1,067	/hole
432 Golf Driving Range **	13.83	$27	$373	/tee
435 Multipurpose Recreation/Arcade **	37.06	$27	$1,001	/T.S.F.G.F.A.
437 Bowling Alley	36.87	$27	$995	/lane
443 Movie Theater w/out matinee	243.36	$27	$6,571	/screen
444 Movie Theater w/matinee **	223.67	$27	$6,039	/screen
445 Multiplex Movie Theater (10+ screens) **	150.88	$27	$4,074	/screen
473 Casino/Video Poker/Lottery **	148.56	$27	$4,011	/T.S.F.G.F.A.
480 Amusement/Theme Park	83.80	$27	$2,263	/acre
488 Soccer Complex	78.90	$27	$2,130	/field
492 Racquet/Tennis Club	42.81	$27	$1,156	/court
492 Health/Fitness Club	36.43	$27	$984	/T.S.F.G.F.A.
495 Recreation/Community Center	34.32	$27	$927	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:

T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area

T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area

V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.6

REIMBURSEMENT FEE PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Net Adjusted Trips	Reimbursement Fee Per Trip-End	Reimb. Fee Per Unit	Unit *
INSTITUTIONAL/MEDICAL				
501 Military Base	1.89	$27	$51	/employee
520 Elementary School (Public)	0.51	$27	$14	/student
522 Middle/Junior High School (Public)	0.65	$27	$17	/student
530 High School (Public)	1.28	$27	$35	/student
536 Private School (K - 12)	1.86	$27	$50	/student
540 Junior/Community College	0.90	$27	$24	/student
550 University/College	1.78	$27	$48	/student
560 Church	6.83	$27	$184	/T.S.F.G.F.A.
565 Day Care Center/Preschool	1.79	$27	$48	/student
590 Library	21.54	$27	$582	/T.S.F.G.F.A.
610 Hospital	12.52	$27	$338	/bed
620 Nursing Home	2.51	$27	$68	/bed
630 Clinic	33.33	$27	$900	/T.S.F.G.F.A.
COMMERCIAL/SERVICES				
310 Hotel/Motel	11.09	$27	$299	/room
812 Building Materials/Lumber	19.81	$27	$535	/T.S.F.G.F.A.
813 Free-Standing Discount Superstore				
With Groceries	29.84	$27	$806	/T.S.F.G.F.A.
814 Specialty Retail Center	24.68	$27	$666	/T.S.F.G.L.A.
815 Free-Standing Discount Store				
Without Groceries	39.23	$27	$1,059	/T.S.F.G.F.A.
816 Hardware/Paint Stores	32.02	$27	$865	/T.S.F.G.F.A.
817 Nursery/Garden Center	20.09	$27	$542	/T.S.F.G.F.A.
820 Shopping Center	23.91	$27	$646	/T.S.F.G.L.A.
823 Factory Outlet Center	14.81	$27	$400	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.6

REIMBURSEMENT FEE PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Net Adjusted Trips	Reimbursement Fee Per Trip-End	Reimb. Fee Per Unit	Unit *
INSTITUTIONAL/MEDICAL				
501 Military Base	18.56	$27	$501	/employee
520 Elementary School (Public)	29.77	$27	$804	/student
522 Middle/Junior High School (Public)	12.37	$27	$334	/student
530 High School (Public)	55.20	$27	$1,490	/student
536 Private School (K - 12)	121.68	$27	$3,285	/student
540 Junior/Community College	78.00	$27	$2,106	/student
550 University/College	4.71	$27	$127	/student
560 Church	29.27	$27	$790	/T.S.F.G.F.A.
565 Day Care Center/Preschool	13.07	$27	$353	/student
590 Library	22.80	$27	$616	/T.S.F.G.F.A.
610 Hospital	18.93	$27	$511	/bed
620 Nursing Home	0.00	$27	$0	/bed
630 Clinic	35.71	$27	$964	/T.S.F.G.F.A.
COMMERCIAL/SERVICES				
310 Hotel/Motel	2.01	$27	$54	/room
812 Building Materials/Lumber	133.29	$27	$3,599	/T.S.F.G.F.A.
813 Free-Standing Discount Superstore				
With Groceries	110.21	$27	$2,976	/T.S.F.G.F.A.
814 Specialty Retail Center	0.00	$27	$0	/T.S.F.G.L.A.
815 Free-Standing Discount Store				
Without Groceries	0.00	$27	$0	/T.S.F.G.F.A.
816 Hardware/Paint Stores	0.00	$27	$0	/T.S.F.G.F.A.
817 Nursery/Garden Center	0.00	$27	$0	/T.S.F.G.F.A.
820 Shopping Center	0.00	$27	$0	/T.S.F.G.L.A.
823 Factory Outlet Center	0.00	$27	$0	/T.S.F.G.F.A.

TABLE 4.6

REIMBURSEMENT FEE PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Net Adjusted Trips	Reimbursement Fee Per Trip-End	Reimb. Fee Per Unit	Unit *
COMMERCIAL/SERVICES (continued)				
931 Quality Restaurant (not a chain)	50.47	$27	$1,363	/T.S.F.G.F.A.
932 High Turnover, Sit-Down Restaurant (chain or stand alone)	36.24	$27	$978	/T.S.F.G.F.A.
933 Fast Food Restaurant (No Drive-Thru)	179.00	$27	$4,833	/T.S.F.G.F.A.
934 Fast Food Restaurant (With Drive-Thru)	124.03	$27	$3,349	/T.S.F.G.F.A.
936 Drinking Place/Bar **	28.35	$27	$765	/T.S.F.G.F.A.
941 Quick Lubrication Vehicle Shop	19.57	$27	$528	/Service Stall
942 Automobile Care Center **	19.62	$27	$530	/T.S.F.G.L.A.
944 Gasoline/Service Station (no Market or Car Wash)	41.33	$27	$1,116	/V.F.P.
945 Gasoline/Service Station (With Convenience Market)	30.28	$27	$818	/V.F.P.
946 Gasoline/Service Station (With Convenience Market and Car Wash)	28.43	$27	$768	/V.F.P.
OFFICE				
710 General Office Building	11.67	$27	$315	/T.S.F.G.F.A.
714 Corporate Headquarters Building	8.46	$27	$228	/T.S.F.G.F.A.
715 Single Tenant Office Building	12.26	$27	$331	/T.S.F.G.F.A.
720 Medical-Dental Office Building	38.29	$27	$1,034	/T.S.F.G.F.A.
731 State Motor Vehicles Dept.	175.96	$27	$4,751	/T.S.F.G.F.A.
732 U.S. Post Office	95.17	$27	$2,570	/T.S.F.G.F.A.
750 Office Park	12.10	$27	$327	/T.S.F.G.F.A.
760 Research and Development Center	8.60	$27	$232	/T.S.F.G.F.A.
770 Business Park	13.52	$27	$365	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.6

REIMBURSEMENT FEE PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Net Adjusted Trips	Reimbursement Fee Per Trip-End	Reimb. Fee Per Unit	Unit *
PORT/INDUSTRIAL				
030 Truck Terminals	10.44	$27	$282	/T.S.F.G.F.A.
090 Park and Ride Lot With Bus Service	3.80	$27	$103	/Parking Space
093 Light Rail Transit Station With Parking	2.12	$27	$57	/Parking Space
110 General Light Industrial	7.39	$27	$199	/T.S.F.G.F.A.
120 General Heavy Industrial	1.59	$27	$43	/T.S.F.G.F.A.
130 Industrial Park	7.38	$27	$199	/T.S.F.G.F.A.
140 Manufacturing	4.05	$27	$109	/T.S.F.G.F.A.
150 Warehouse	5.26	$27	$142	/T.S.F.G.F.A.
151 Mini-Warehouse	2.65	$27	$72	/T.S.F.G.F.A.
170 Utilities**	6.69	$27	$181	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

G. Formula 7: Compliance Cost Per Trip-End

The City incurs costs to comply with legal requirements for SDCs and may recoup a portion of those costs in accordance with ORS 223.307(5). Compliance costs during the 20-year collection period have been estimated as follows:

Transportation System Plan, CIP, and SDC Methodology Updates (4 X $175,000 for consulting and staff services)	$700,000
Annual SDC-CIP Management, Accounting and Reporting Costs (approximately $10,000 per year for consulting, legal, audit, financial reporting and staff services)	$200,000
Total Estimated 20-year Compliance Costs	$900,000

To calculate the Compliance Cost Per Trip End, the Estimated 20-year Compliance Costs identified on page 14 is divided by the total average number of new trip-ends from Table 3.1, page 7, as shown in the following formula:

7.	20-year Compliance Costs	÷	Total New Daily Trip-Ends	=	Compliance Cost Per Trip-End

Calculation of the Compliance Cost Per Trip-End is shown in Table 4.7, below.

TABLE 4.7

COMPLIANCE COST PER TRIP END

20-Year Compliance Costs		Total New Daily Trip-Ends		Compliance Cost Per Trip-End
$900,000	÷	25,033	=	$36

H. Formula 8: Compliance Cost Per Unit (by Type of Land Use)

The compliance cost per unit of development is calculated for each type of land use by multiplying the net adjusted number of trips for each land use (from Table 4.2) by the compliance cost per new trip-end (from Table 4.7, above).

8.	Net Adjusted Trips Per Unit	X	Compliance Cost Per Trip-End	=	Compliance Cost Per Unit

Table 4.8 (pages 36 - 40) displays the compliance cost per unit for each land use category. Column 1 repeats the ITE land use codes and categories, and Column 2 repeats the net adjusted trips for each land use category (from Table 4.2). The compliance cost per trip-end is shown in Column 3. The Compliance Cost Per Unit is calculated by multiplying the net adjusted trips for each land use category (Column 2) by the compliance cost per trip-end (Column 3).

TABLE 4.8

COMPLIANCE COST PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Net Adjusted Trips	Compliance Cost Per Trip-End	Compl. Cost Per Unit	Unit *
RESIDENTIAL				
210 Single Family Detached	9.57	$36	$345	/dwelling unit
220 Apartment	6.72	$36	$242	/dwelling unit
230 Residential Condominium/Townhouse	5.86	$36	$211	/dwelling unit
240 Manufactured Housing (in Park)	4.99	$36	$180	/dwelling unit
254 Assisted Living	2.74	$36	$99	/bed
255 Continuing Care Retirement	2.81	$36	$101	/unit
260 Recreation Home	3.16	$36	$114	/dwelling unit
RECREATIONAL				
411 City Park	1.76	$36	$63	/acre
412 County Park	2.52	$36	$91	/acre
416 Campground/RV Park **	4.54	$36	$163	/camp site
420 Marina	3.27	$36	$118	/berth
430 Golf Course	39.53	$36	$1,423	/hole
432 Golf Driving Range **	13.83	$36	$498	/tee
435 Multipurpose Recreation/Arcade **	37.06	$36	$1,334	/T.S.F.G.F.A.
437 Bowling Alley	36.87	$36	$1,327	/lane
443 Movie Theater w/out matinee	243.36	$36	$8,761	/screen
444 Movie Theater w/matinee **	223.67	$36	$8,052	/screen
445 Multiplex Movie Theater (10+ screens) **	150.88	$36	$5,432	/screen
473 Casino/Video Poker/Lottery **	148.56	$36	$5,348	/T.S.F.G.F.A.
480 Amusement/Theme Park	83.80	$36	$3,017	/acre
488 Soccer Complex	78.90	$36	$2,841	/field
492 Racquet/Tennis Club	42.81	$36	$1,541	/court
492 Health/Fitness Club	36.43	$36	$1,311	/T.S.F.G.F.A.
495 Recreation/Community Center	34.32	$36	$1,236	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.8

COMPLIANCE COST PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Net Adjusted Trips	Compliance Cost Per Trip-End	Compl. Cost Per Unit	Unit *
INSTITUTIONAL/MEDICAL				
501 Military Base	1.89	$36	$68	/employee
520 Elementary School (Public)	0.51	$36	$19	/student
522 Middle/Junior High School (Public)	0.65	$36	$23	/student
530 High School (Public)	1.28	$36	$46	/student
536 Private School (K - 12)	1.86	$36	$67	/student
540 Junior/Community College	0.90	$36	$32	/student
550 University/College	1.78	$36	$64	/student
560 Church	6.83	$36	$246	/T.S.F.G.F.A.
565 Day Care Center/Preschool	1.79	$36	$64	/student
590 Library	21.54	$36	$776	/T.S.F.G.F.A.
610 Hospital	12.52	$36	$451	/bed
620 Nursing Home	2.51	$36	$90	/bed
630 Clinic	33.33	$36	$1,200	/T.S.F.G.F.A.
COMMERCIAL/SERVICES				
310 Hotel/Motel	11.09	$36	$399	/room
812 Building Materials/Lumber	19.81	$36	$713	/T.S.F.G.F.A.
813 Free-Standing Discount Superstore				
With Groceries	29.84	$36	$1,074	/T.S.F.G.F.A.
814 Specialty Retail Center	24.68	$36	$888	/T.S.F.G.L.A.
815 Free-Standing Discount Store				
Without Groceries	39.23	$36	$1,412	/T.S.F.G.F.A.
816 Hardware/Paint Stores	32.02	$36	$1,153	/T.S.F.G.F.A.
817 Nursery/Garden Center	20.09	$36	$723	/T.S.F.G.F.A.
820 Shopping Center	23.91	$36	$861	/T.S.F.G.L.A.
823 Factory Outlet Center	14.81	$36	$533	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.8

COMPLIANCE COST PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Net Adjusted Trips	Compliance Cost Per Trip-End	Compl. Cost Per Unit	Unit *
COMMERCIAL/SERVICES (continued)				
841 New Car Sales	18.56	$36	$668	/T.S.F.G.F.A.
843 Automobile Parts Sales	29.77	$36	$1,072	/T.S.F.G.F.A.
849 Tire Superstore	12.37	$36	$445	/T.S.F.G.F.A.
850 Supermarket	55.20	$36	$1,987	/T.S.F.G.F.A.
851 Convenience Market (24 hour)	121.68	$36	$4,381	/T.S.F.G.F.A.
853 Convenience Market With Fuel Pump	78.00	$36	$2,808	/V.F.P.
860 Wholesale Market	4.71	$36	$170	/T.S.F.G.F.A.
861 Discount Club	29.27	$36	$1,054	/T.S.F.G.F.A.
862 Home Improvement Superstore	13.07	$36	$471	/T.S.F.G.F.A.
863 Electronics Superstore	22.80	$36	$821	/T.S.F.G.F.A.
867 Office Supply Superstore **	18.93	$36	$682	/T.S.F.G.F.A.
880 Pharmacy/Drugstore				
Without Drive-Thru Window	35.71	$36	$1,286	/T.S.F.G.F.A.
881 Pharmacy/Drugstore				
With Drive-Thru Window	37.93	$36	$1,366	/T.S.F.G.F.A.
890 Furniture Store	2.01	$36	$72	/T.S.F.G.F.A.
896 Video Rental Store **	133.29	$36	$4,799	/T.S.F.G.F.A.
911 Bank/Savings: Walk-in	109.57	$36	$3,944	/T.S.F.G.F.A.
912 Bank/Savings: Drive-In	110.21	$36	$3,968	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.8

COMPLIANCE COST PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Net Adjusted Trips	Compliance Cost Per Trip-End	Compl. Cost Per Unit	Unit *
COMMERCIAL/SERVICES (continued)				
931 Quality Restaurant (not a chain)	50.47	$36	$1,817	/T.S.F.G.F.A.
932 High Turnover, Sit-Down Restaurant (chain or stand alone)	36.24	$36	$1,305	/T.S.F.G.F.A.
933 Fast Food Restaurant (No Drive-Thru)	179.00	$36	$6,444	/T.S.F.G.F.A.
934 Fast Food Restaurant (With Drive-Thru)	124.03	$36	$4,465	/T.S.F.G.F.A.
936 Drinking Place/Bar **	28.35	$36	$1,021	/T.S.F.G.F.A.
941 Quick Lubrication Vehicle Shop	19.57	$36	$705	/Service Stall
942 Automobile Care Center **	19.62	$36	$706	/T.S.F.G.L.A.
944 Gasoline/Service Station (no Market or Car Wash)	41.33	$36	$1,488	/V.F.P.
945 Gasoline/Service Station (With Convenience Market)	30.28	$36	$1,090	/V.F.P.
946 Gasoline/Service Station (With Convenience Market and Car Wash)	28.43	$36	$1,024	/V.F.P.
OFFICE				
710 General Office Building	11.67	$36	$420	/T.S.F.G.F.A.
714 Corporate Headquarters Building	8.46	$36	$304	/T.S.F.G.F.A.
715 Single Tenant Office Building	12.26	$36	$441	/T.S.F.G.F.A.
720 Medical-Dental Office Building	38.29	$36	$1,379	/T.S.F.G.F.A.
731 State Motor Vehicles Dept.	175.96	$36	$6,334	/T.S.F.G.F.A.
732 U.S. Post Office	95.17	$36	$3,426	/T.S.F.G.F.A.
750 Office Park	12.10	$36	$436	/T.S.F.G.F.A.
760 Research and Development Center	8.60	$36	$309	/T.S.F.G.F.A.
770 Business Park	13.52	$36	$487	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

TABLE 4.8

COMPLIANCE COST PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Net Adjusted Trips	Compliance Cost Per Trip-End	Compl. Cost Per Unit	Unit *
PORT/INDUSTRIAL				
030 Truck Terminals	10.44	$36	$376	/T.S.F.G.F.A.
090 Park and Ride Lot With Bus Service	3.80	$36	$137	/Parking Space
093 Light Rail Transit Station With Parking	2.12	$36	$76	/Parking Space
110 General Light Industrial	7.39	$36	$266	/T.S.F.G.F.A.
120 General Heavy Industrial	1.59	$36	$57	/T.S.F.G.F.A.
130 Industrial Park	7.38	$36	$266	/T.S.F.G.F.A.
140 Manufacturing	4.05	$36	$146	/T.S.F.G.F.A.
150 Warehouse	5.26	$36	$189	/T.S.F.G.F.A.
151 Mini-Warehouse	2.65	$36	$95	/T.S.F.G.F.A.
170 Utilities**	6.69	$36	$241	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

** Because there is no ITE Weekday Average Trip Rate for this code/category, the Trip Rate shown is the ITE P.M. Peak Hour Trip Rate multiplied by a factor of ten.

I. Formula 9: Total Transportation SDC Per Unit (by Type of Land Use)

The Total Transportation SDC per unit of development is calculated for each type of land use by adding the improvement fee per unit (from Table 4.4, pages 24 – 28), the reimbursement fee per unit (from Table 4.6, pages 30 - 34), and the compliance cost per unit (from Table 4.8, pages 36 - 40).

	Improvement Fee Per Unit		Reimbursement Fee Per Unit		Compliance Cost Per Unit		Total Transportation SDC Per Unit
9.		+		+		=	

Table 4.9 (pages 41 – 45) displays the Total Transportation SDC per unit for each category. Columns 1 repeats the ITE codes and categories, and columns 2, 3, and 4 display the improvement fee from Table 4.4, reimbursement fee from Table 4.6, and compliance cost from Table 4.8, respectively. The Total Transportation SDC Per Unit is calculated by adding columns 2, 3 and 4, with the result displayed in column 5.

TABLE 4.9

TOTAL TRANSPORTATION SDC PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Impr. Fee Per Unit	Reimb. Fee Per Unit	Compl. Cost Per Unit	TOTAL SDC Per Unit	Unit *
RESIDENTIAL					
210 Single Family Detached	$2,172	$258	$345	$2,775	/dwelling unit
220 Apartment	$1,525	$181	$242	$1,949	/dwelling unit
230 Residential Condominium/Townhouse	$1,330	$158	$211	$1,699	/dwelling unit
240 Manufactured Housing (in Park)	$1,133	$135	$180	$1,447	/dwelling unit
254 Assisted Living	$622	$74	$99	$795	/bed
255 Continuing Care Retirement	$638	$76	$101	$815	/unit
260 Recreation Home	$717	$85	$114	$916	/dwelling unit
RECREATIONAL					
411 City Park	$399	$47	$63	$510	/acre
412 County Park	$573	$68	$91	$731	/acre
416 Campground/RV Park **	$1,030	$122	$163	$1,315	/camp site
420 Marina	$743	$88	$118	$950	/berth
430 Golf Course	$8,974	$1,067	$1,423	$11,465	/hole
432 Golf Driving Range **	$3,139	$373	$498	$4,010	/tee
435 Multipurpose Recreation/Arcade **	$8,412	$1,001	$1,334	$10,747	/T.S.F.G.F.A.
437 Bowling Alley	$8,369	$995	$1,327	$10,692	/lane
443 Movie Theater w/out matinee	$55,243	$6,571	$8,761	$70,574	/screen
444 Movie Theater w/matinee **	$94,992	$11,299	$15,065	$121,355	/screen
445 Multiplex Movie Theater (10+ screens) **	$64,885	$7,718	$10,290	$82,893	/screen
473 Casino/Video Poker/Lottery **	$33,723	$4,011	$5,348	$43,082	/T.S.F.G.F.A.
480 Amusement/Theme Park	$19,024	$2,263	$3,017	$24,303	/acre
488 Soccer Complex	$17,911	$2,130	$2,841	$22,882	/field
492 Racquet/Tennis Club	$9,718	$1,156	$1,541	$12,415	/court
492 Health/Fitness Club	$8,269	$984	$1,311	$10,564	/T.S.F.G.F.A.
495 Recreation/Community Center	$7,791	$927	$1,236	$9,953	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
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T.S.F.G.L.A. = Thousand Square Feet Gross Leaseable Area
V.F.P. = Vehicle Fueling Position

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TABLE 4.9

TOTAL TRANSPORTATION SDC PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Impr. Fee Per Unit	Reimb. Fee Per Unit	Compl. Cost Per Unit	TOTAL SDC Per Unit	Unit *
INSTITUTIONAL/MEDICAL					
501 Military Base	$428	$51	$68	$547	/employee
520 Elementary School (Public)	$117	$14	$19	$149	/student
522 Middle/Junior High School (Public)	$147	$17	$23	$187	/student
530 High School (Public)	$291	$35	$46	$372	/student
536 Private School (K - 12)	$422	$50	$67	$539	/student
540 Junior/Community College	$203	$24	$32	$260	/student
550 University/College	$403	$48	$64	$515	/student
560 Church	$1,551	$184	$246	$1,981	/T.S.F.G.F.A.
565 Day Care Center/Preschool	$406	$48	$64	$518	/student
590 Library	$4,891	$582	$776	$6,248	/T.S.F.G.F.A.
610 Hospital	$2,841	$338	$451	$3,630	/bed
620 Nursing Home	$570	$68	$90	$729	/bed
630 Clinic	$7,566	$900	$1,200	$9,666	/T.S.F.G.F.A.
	$0	$0	$0	$0	
COMMERCIAL/SERVICES	$0	$0	$0	$0	
310 Hotel/Motel	$2,517	$299	$399	$3,216	/room
812 Building Materials/Lumber	$4,497	$535	$713	$5,745	/T.S.F.G.F.A.
813 Free-Standing Discount Superstore	$0	$0	$0	$0	
With Groceries	$6,773	$806	$1,074	$8,652	/T.S.F.G.F.A.
814 Specialty Retail Center	$5,602	$666	$888	$7,156	/T.S.F.G.L.A.
815 Free-Standing Discount Store	$0	$0	$0	$0	
Without Groceries	$8,904	$1,059	$1,412	$11,376	/T.S.F.G.F.A.
816 Hardware/Paint Stores	$7,268	$865	$1,153	$9,286	/T.S.F.G.F.A.
817 Nursery/Garden Center	$4,560	$542	$723	$5,826	/T.S.F.G.F.A.
820 Shopping Center	$5,427	$646	$861	$6,934	/T.S.F.G.L.A.
823 Factory Outlet Center	$3,361	$400	$533	$4,294	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
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TABLE 4.9

TOTAL TRANSPORTATION SDC PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Impr. Fee Per Unit	Reimb. Fee Per Unit	Compl. Cost Per Unit	TOTAL SDC Per Unit	Unit *
COMMERCIAL/SERVICES (continued)					
841 New Car Sales	$4,214	$501	$668	$5,383	/T.S.F.G.F.A.
843 Automobile Parts Sales	$6,758	$804	$1,072	$8,633	/T.S.F.G.F.A.
849 Tire Superstore	$2,807	$334	$445	$3,586	/T.S.F.G.F.A.
850 Supermarket	$12,531	$1,490	$1,987	$16,008	/T.S.F.G.F.A.
851 Convenience Market (24 hour)	$27,622	$3,285	$4,381	$35,288	/T.S.F.G.F.A.
853 Convenience Market With Fuel Pump	$17,705	$2,106	$2,808	$22,619	/V.F.P.
860 Wholesale Market	$1,070	$127	$170	$1,367	/T.S.F.G.F.A.
861 Discount Club	$6,644	$790	$1,054	$8,488	/T.S.F.G.F.A.
862 Home Improvement Superstore	$2,968	$353	$471	$3,791	/T.S.F.G.F.A.
863 Electronics Superstore	$5,175	$616	$821	$6,611	/T.S.F.G.F.A.
867 Office Supply Superstore **	$4,297	$511	$682	$5,490	/T.S.F.G.F.A.
880 Pharmacy/Drugstore	$0	$0	$0	$0	
Without Drive-Thru Window	$8,106	$964	$1,286	$10,356	/T.S.F.G.F.A.
881 Pharmacy/Drugstore	$0	$0	$0	$0	
With Drive-Thru Window	$8,610	$1,024	$1,366	$11,000	/T.S.F.G.F.A.
890 Furniture Store	$455	$54	$72	$582	/T.S.F.G.F.A.
896 Video Rental Store **	$30,258	$3,599	$4,799	$38,655	/T.S.F.G.F.A.
911 Bank/Savings: Walk-in	$24,872	$2,958	$3,944	$31,775	/T.S.F.G.F.A.
912 Bank/Savings: Drive-In	$25,018	$2,976	$3,968	$31,961	/T.S.F.G.F.A.

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TABLE 4.9

TOTAL TRANSPORTATION SDC PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Impr. Fee Per Unit	Reimb. Fee Per Unit	Compl. Cost Per Unit	TOTAL SDC Per Unit	Unit *
COMMERCIAL/SERVICES (continued)					
931 Quality Restaurant (not a chain)	$11,457	$1,363	$1,817	$14,636	/T.S.F.G.F.A.
932 High Turnover, Sit-Down	$0	$0	$0	$0	
Restaurant (chain or stand alone)	$8,226	$978	$1,305	$10,509	/T.S.F.G.F.A.
933 Fast Food Restaurant (No Drive-Thru)	$40,633	$4,833	$6,444	$51,910	/T.S.F.G.F.A.
934 Fast Food Restaurant (With Drive-Thru)	$28,155	$3,349	$4,465	$35,969	/T.S.F.G.F.A.
936 Drinking Place/Bar **	$6,435	$765	$1,021	$8,222	/T.S.F.G.F.A.
941 Quick Lubrication Vehicle Shop	$4,443	$528	$705	$5,676	/Service Stall
942 Automobile Care Center **	$4,454	$530	$706	$5,690	/T.S.F.G.L.A.
944 Gasoline/Service Station	$0	$0	$0	$0	
(no Market or Car Wash)	$9,383	$1,116	$1,488	$11,987	/V.F.P.
945 Gasoline/Service Station	$0	$0	$0	$0	
(With Convenience Market)	$6,874	$818	$1,090	$8,781	/V.F.P.
946 Gasoline/Service Station	$0	$0	$0	$0	
(With Convenience Market and Car Wash)	$6,454	$768	$1,024	$8,245	/V.F.P.
	$0	$0	$0	$0	
OFFICE	$0	$0	$0	$0	
710 General Office Building	$2,649	$315	$420	$3,384	/T.S.F.G.F.A.
714 Corporate Headquarters Building	$1,920	$228	$304	$2,453	/T.S.F.G.F.A.
715 Single Tenant Office Building	$2,784	$331	$441	$3,556	/T.S.F.G.F.A.
720 Medical-Dental Office Building	$8,692	$1,034	$1,379	$11,105	/T.S.F.G.F.A.
731 State Motor Vehicles Dept.	$39,942	$4,751	$6,334	$51,027	/T.S.F.G.F.A.
732 U.S. Post Office	$21,604	$2,570	$3,426	$27,600	/T.S.F.G.F.A.
750 Office Park	$2,747	$327	$436	$3,510	/T.S.F.G.F.A.
760 Research and Development Center	$1,951	$232	$309	$2,493	/T.S.F.G.F.A.
770 Business Park	$3,070	$365	$487	$3,922	/T.S.F.G.F.A.

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TABLE 4.9

TOTAL TRANSPORTATION SDC PER UNIT OF DEVELOPMENT

ITE LAND USE CODE/CATEGORY	Impr. Fee Per Unit	Reimb. Fee Per Unit	Compl. Cost Per Unit	TOTAL SDC Per Unit	Unit *
PORT/INDUSTRIAL					
030 Truck Terminals	$2,370	$282	$376	$3,027	/T.S.F.G.F.A.
090 Park and Ride Lot With Bus Service	$862	$103	$137	$1,101	/Parking Space
093 Light Rail Transit Station With Parking	$481	$57	$76	$614	/Parking Space
110 General Light Industrial	$1,677	$199	$266	$2,142	/T.S.F.G.F.A.
120 General Heavy Industrial	$361	$43	$57	$461	/T.S.F.G.F.A.
130 Industrial Park	$1,674	$199	$266	$2,139	/T.S.F.G.F.A.
140 Manufacturing	$919	$109	$146	$1,174	/T.S.F.G.F.A.
150 Warehouse	$1,193	$142	$189	$1,524	/T.S.F.G.F.A.
151 Mini-Warehouse	$601	$72	$95	$768	/T.S.F.G.F.A.
170 Utilities**	$1,518	$181	$241	$1,939	/T.S.F.G.F.A.

* Abbreviations used in the "Unit" column:
T.S.F.G.F.A. = Thousand Square Feet Gross Floor Area
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CITY OF SCAPPOOSE
Parks and Recreation Capital Facilities Plan and System Development Charges Methodology Report

1.0 INTRODUCTION

Scappoose is experiencing tremendous population growth, and is expected to expand to nearly two-and-a-half times its current population during the next twenty years (1997 - 2016). Parks and recreation resources within the City are currently very limited, with schools providing for most neighborhood and community parks facility needs.

This plan identifies current levels of service, addresses growth needs through a detailed methodology for parks and recreation system development charges, , and provides suggestions for funding non-growth items as well as those growth-related capital improvements not paid by system development charges.

2.0 NEEDS ANALYSIS

The needs analysis section of this report presents the basis for development of the capital facilities plan. In particular, this section of the report includes:

A. Survey data reviewed by the ad hoc committee
B. Population information for the City of Scappoose
C. Current inventory of parks and recreation facilities,
D. Parks, recreation, and opens space facility types and standards, and
E. Needs, based on the application of standards and other data.

A. Survey Data

The University of Oregon's Institute of Recreation Research and Service conducted a survey in 1991 on behalf of the Scappoose Park & Recreation District and the Scappoose Library District. The survey gathered a variety of information, including opinions concerning:

- the importance of various parks and recreation programs and activities to the quality of life,
- the level of interest in developing and building specific types of park. recreation, and cultural facilities improvements,
- desired community center programs, and
- programming activity suggestions

The survey responses were reviewed by the ad hoc committee and used in developing recommendations for improvements to be included in the capital facilities plan. A summary of key survey responses is included as Appendix A.

B. Population Information

The planning period for this report is twenty years (1997-2016). The population of the City of Scappoose grew from 3,529 persons in 1990 to about 4,130 in 1996, for an average annual growth rate of about 2.7%. Economic & Engineering Services, Inc., contracted by the City of Scappoose to conduct a water study, has performed a demographics analysis that forecasts growth at 4.0% per year through 2000, 4.5% per year between 2001 and 2005, 5.0% per year between 2006 and 2010, 5.5% per year between 2011 and 2015, and 1% per year between 2015 and 2020. Using these assumptions, the City will have a population of about 9,821 in the year 2016, nearly 2.5 times as many residents as in 1996!

As this growth occurs, the demographic make-up of the community may change, and the community's parks and recreation interests may also change significantly and rapidly. For this reason, it is recommended that community interests and parks and recreation needs be monitored through the use of surveys and similar techniques, and that the parks and recreation Capital Facilities Plan be updated at least once every three years.

C. *Inventory of Existing Facilities*

The City of Scappoose recently opened Heritage Park, a "town square" special use park located on the site of the City's new library and former "temporary" City Hall. The City also owns several parcels along Scappoose Creek that are suitable for use as part of a linear park/trail system, and an eighty (80) acre forested natural resource area.

Most of the City's active recreation facilities, including ballfields, tennis courts, playgrounds, and other facilities have been provided primarily by Scappoose School District 1J. Steinfield's, Inc., also provides land on which two little league baseball fields have been constructed. An inventory of existing facilities is included in Table 2.1. Facility locations are also indicated on the City of Scappoose Parks and Recreation Facilities Planning Map (Appendix B).

D. *Facility Types and Standards*

Descriptions of each of the major types of parks and recreation facilities to be included in the City's parks and recreation system have been developed. They include:

- mini-park
- neighborhood park
- community/school park
- special use park/facility
- linear park/trail
- open space/forest/natural area resource
- athletic/sports facilities

Complete descriptions including use and characteristics, service area, desirable size, and Level of Service (LOS) standard are identified in Table 2.2.

TABLE 2.1

CITY OF SCAPPOOSE

Parks and Recreation Facilities Inventory/ Current Level of Service Analysis

Component	Senior Center	Heritage Park	Nature Preserve	Creek-view	Laurel Street	4th St	Mdow-brook	Stein-field's	High School	Middle School	Peter-sen School	Grant Watt School	School Admin	Combined Facilities Total	Combined Facilities LOS*
Special Use Park (acre)	2	2.3												4.30	1.04
Neighborhood Park (acre)											2	2		4.00	0.97
Community/School Park (acre)									10	7	1	3	5	26.00	6.30
Linear Park/Trail (acre)				2.71	0.72	1.98	2.04							7.45	1.80
Open Sp./Forest/Nat. Area (acre)			80											80.00	19.37
Outdr. Bsktball Crt. (ea.)										2	1			3.00	0.73
Ltd.Tennis Crt. (ea.)										2				2.00	0.48
Rec. Bsebl/Sftbl Fld. (ea.)								2	3			1	4	10.00	2.42
Ltd. Bsebl/Sftb. Fld. (ea)										1				1.00	0.24
Ltd. Soccer Field (ea)										1				1.00	0.24
Rec. Soccer/Ftbl. Fld.										1				1.00	0.24
Gymnasium (ea)									1	1	1	1		4.00	0.97
Football Stadium (ea)									1					1.00	0.24
Run/Walk Track (ea)									1	1				2.00	0.48
Community/Senior Cntr. (sq.ft.)	7865													7865.00	1904.36
Estimated 1996 City Population	4,130														

* LOS = Level of Service per 1,000 persons

TABLE 2.2

City of Scappoose
Parks, Recreation and Open Space
Facility Types and Standards

Type of Facility	Use and Characteristics	Service Area	Desirable Size	LOS Standard / 1,000 person
Mini-Park	Small designated park facility which may include benches, play equipment, picnic tables, and/or other similar amenities; usually easily accessible only to adjacent/nearby residents. May serve as neighborhood park for areas with restricted access to other park facilities.	variable	up to 1.0 acre	2.0 acres (w/neigbor-hood parks)
Neighborhood Park	Park facility designed to serve the daily active and passive recreation needs of a neighborhood. Usually includes playground equipment, picnic areas, and vegetation; may be co-located with or on a school site and may include areas for field games, court games, etc. Within safe and easy walking distance of area residents; does not require the crossing of maior streets or other barriers. Does not include restrooms or on site parking.	up to 1/4 mile radius	1 to 5 acres	2.0 acres (w/mini parks
Community/School Park	Area of diverse environmental qualities and uses designed to serve a population of 5,000 to 20,000 persons. May include passive recreation areas for picnicking, walking, etc. as well as areas for active recreational activities; may be co-located with or on a school site and may include areas for field games, court games, etc.. Usually includes restrooms and on-site parking. May also serve as neighborhood park for residents within 1/4 mile if playground equipment is provided.	City	5 to 20 acres	3.5 acres
Special Use Park/Facility	Facilities or areas for specialized or single purpose recreational activities, such as town squares, marinas, zoos, arenas, senior centers, etc.	variable	variable	no standard
Linear Park/Trail	Linear strip of land comprising natural or man-made resources such as a stream, river, ridge line, service road, utility or transit right-of-way. May be used to connect parks and other points of interest. Sufficient width to protect from adjacent infringements and maintain environmental integrity. Used for walking, hiking, bicycling, horseback riding, etc. Trailhead facilities may include restrooms and/or limited parking.	City	variable	1.86 acres
Open Space/Forest/ Natural Area Resource	Undeveloped forest, open space or natural area devoid of developed active recreation facilities; may include passive walkways, boardwalks, interpretive sites, etc.	variable	variable	no standard
Athletic/Sports Facilities	Facilities designed for use for specific athletic or sports activities such as soccer, baseball/softball, swimming, track and field, basketball, etc. May be located in a community or neighborhood park, or co-located with school/church facilities. May include off-street parking and restroom facilities. Examples of facilities include:	City	variable	see below
	a) Outdoor Basketball Courts			a) no stndrd
	b) Lighted Tennis Courts			b) no stndrd
	c) Rec. Baseball/Softball Fields			c) no stndrd
	d) Lighted Baseball/Softball Fields			d) no stndrd
	e) Lighted Soccer Fields			e) no stndrd
	f) Rec. Soccer/Football. Fields			f) no stndrd
	g) Gymnasiums/Recreation Centers			g) no stndrd
	h) Football Stadiums			h) no stndrd
	i) Run/Walk Tracks			i) no stndrd
	j) Aquatics Centers			j) 0.05

E. Facility Needs

The facility standards identified in Table 2.2 provide objective criteria by which future facility needs can be determined. Using these criteria, the City can identify both deficiencies and growth-related needs, and develop a prioritized list of capital improvement projects. As improvements are completed, a new list of prioritized projects can be developed based on the facility standards.

The Capital Facilities Plan included in Section 3.0 of this report was developed through the application of the standards identified in Table 2.2. The plan identifies projects by year for the first five years, and then by five-year period for the next fifteen years. The plan is based on expected facility needs based on population growth through 2016. A list of facility needs, based on the application of the standards from Table 2.2, is included in Table 2.3.

The City of Scappoose Parks and Recreation Facilities Planning Map (Appendix B), identifies existing facility locations, neighborhood/mini-park service areas, publicly owned potential park sites, vacant land within the existing City limits, and the proposed location of a linear park/trail system. This map can be used as a tool in planning for and siting future facilities.

TABLE 2.3

CITY OF SCAPPOOSE

Parks and Recreation Capital Facility Needs

2016 Population Estimate: **9,821**

1996 Population: **4,130**

Component	Proposed Standard/ 1,000 pers	1996 Need Based on Standard	1996 Inventory	Surplus (Deficit)	2016 Need Based on Standard	Additional Required
Neighborhood/Mini Park (acre)	2.00	8.26	4.00	(4.26)	19.64	15.64
Community/School Park (acre)	3.50	14.45	26.00	11.55	34.37	8.37
Linear Park/Trails (acre)	1.86	7.69	7.45	(0.24)	18.29	10.84
Aquatics Facilities	0.05	0.2065	0.0	(0.21)	0.49	0.49
Athletic/Sports Facilities*	no standard	n/a	variable	n/a	n/a	n/a
Community/Senior Center (sq. ft.)	no standard	n/a	7,865	n/a	n/a	n/a

* except for aquatics facilities, provision of athletic/sports facilities is considered in the cost estimates for Community/School Park facilities in the Capital Facilities Plan.

3.0 CAPITAL FACILITIES PLAN

Parks and Recreation
1997 - 2016

	PROJECT	YRS	TOTAL PROJECT COST	% PARKS /REC USE	PARKS /REC COST	% PRKS GROWTH NEED	GROWTH PORTION OF PRKS COST	% NON-GROWTH COST	NON GROWTH PORTION OF TOTAL COST	PROJECT FUNDING SOURCES
1	Neighborhood/Mini Park Site Acq. - acquire approximately 4.26 acres of land for neighborhood/mini parks in park deficient areas of the City	97-98	$426,000	100%	$426,000	0%	$0	100%	$426,000	Grants, Donations, Partnerships, LIDs
2	Neighborhood/Mini Park Site Acq. - acquire approximately 4 acres of land for neighborhood/mini parks in growing areas of the City	99-00	$400,000	100%	$400,000	100%	$400,000	0%	$0	SDC
3	Community/School Park Site Acq. - acquire approximately 8.37 acres of land for community/school park.	00-01	$837,000	75%	$627,750	100%	$627,750	25%	$209,250	SDC, Grants, Donati Bonds, Partnerships
4	Neighborhood/Mini Park Site Acq. - acquire approximately 4 acres of land for neighborhood/mini parks in growing areas of the City	01-02	$400,000	100%	$400,000	100%	$400,000	0%	$0	SDC
5	Neighborhood/Mini Park Site Dev. - develop approximately 4 acres of neighborhood/mini parks (i.e., tables, playgrounds, landscaping, etc.) in park deficient areas of City.	02-06	$400,000	100%	$400,000	0%	$0	100%	$400,000	Grants, Donations, Bonds, Partnerships, Sponsorships, LIDs
6	Linear Park/Trails - acquire/develop approximately 10 acres (3.3 miles) of linear park/trail facilities	02-06	$300,000	100%	$300,000	25%	$75,000	75%	$225,000	Grants, Donations, Bonds, Partnerships, Sponsorships
7	Community/School Park Site Dev. - develop approximately 8.37 acre community/school park to include selected athletic/sports facilities, such as bask[illegible]ourts, baseball/softball fields, foot[illegible]r fields, tennis courts, etc.; and pla[illegible]	02-06	$837,000	75%	$627,750	100%	$627,750	25%	$209,250	SDC, Grants, Donati Bonds, Partnerships, Sponsorships

3.0 CAPITAL FACILITIES PLAN
Parks and Recreation
1997 - 2016

	PROJECT	YRS	TOTAL PROJECT COST	% PARKS /REC USE	PARKS /REC COST	% PRKS GROWTH NEED	GROWTH PORTION OF PRKS COST	% NON GROWTH COST	NON GROWTH PORTION OF TOTAL COST	PROJECT FUNDING SOURCES
8	Aquatics/Athletics/Community Cntr. - construct a multipurpose aquatics, athletics (i.e., gym, weights, dance, etc.), and community center (theater, etc.)	02-06	$6,000,000	90%	$5,400,000	75%	$4,050,000	32%	$1,950,000	Grants, Donations, Bonds, Partnerships, Sponsorships
9	Neighborhood/Mini Park Site Dev. - develop approximately 4 acres of neighborhood/mini parks (i.e., tables, playgrounds, landscaping, etc.) in growing areas of City.	02-06	$400,000	100%	$400,000	100%	$400,000	0%	$0	SDC
10	Neighborhood/Mini Park Site Acq. - acquire approximately 3.38 acres of land for neighborhood/mini parks in growing areas of the City	07-11	$338,000	100%	$338,000	100%	$338,000	0%	$0	SDC
11	Neighborhood/Mini Park Site Dev. - develop approximately 4 acres of neighborhood/mini parks (i.e., tables, playgrounds, landscaping, etc.) in growing areas of City.	07-11	$364,000	100%	$364,000	100%	$364,000	0%	$0	SDC
12	Linear Park/Trails - acquire/develop approximately 8.29 acres (3.3 miles) of linear park/trail facilities	07-11	$248,700	100%	$248,700	98%	$243,726	2%	$4,974	Grants, Donations, Bonds, Partnerships, Sponsorships
13	Neighborhood/Mini Park Site Dev. - develop approximately 3.38 acres of neighborhood/mini parks (i.e., tables, playgrounds, landscaping, etc.) in growing areas of City.	12-16	$338,000	100%	$338,000	100%	$338,000	0%	$0	SDC
	TOTALS		$11,288,700		$10,270,[illegible]					

4.0 SDC METHODOLOGY

The methodology section of this report presents the rationale for how the Parks and Recreation SDC's were developed. In particular, this section of the report:

A. Discusses and presents the methodology approach used to develop the SDC's,
B. Explains the difference between "reimbursement fee" and "improvement fee" SDC's,
C. Analyzes credits,
D. Establishes the rational nexus of benefit for the SDC, and
E. Presents growth projections and summarizes census data regarding persons per dwelling unit.

A. SDC Methodology Approach

The three basic approaches used in developing SDC's are: (A) Level of Service (LOS)-Driven, (B) Capital Projects-Driven, and (C) Combination. LOS-Driven SDC's work best when individual public facilities cannot be allocated between current and future users on the basis of objective data, and instead are provided on the basis of a level of service. The amount of the SDC is determined by multiplying the proposed LOS for each facility by the estimated cost per unit of facility. Prior to the Supreme Court decision in *Dolan v. Tigard*, the LOS-Driven approach was routinely used in developing parks and recreation SDC's; however, this approach has been largely replaced because of the stricter requirements imposed by *Dolan*.

Capital Projects-Driven SDC's are based on a specific list of planned capital improvements, and the amount of the SDC is determined by allocating a portion of the cost of the planned improvements (the "fair share" that can be attributed to growth) among the projected developments that will be paying SDC's. Capital Projects-Driven SDC's work best when individual public facilities can be allocated between current and future users on the basis of objective data.

A "combination" approach uses elements of both the LOS-Driven approach and the Capital Projects-Driven approach. LOS standards are used to determine facility needs, identify deficiencies, and develop a list of capital improvement projects. These projects are then used as the basis for an "improvement fee" SDC. A "reimbursement fee" SDC may also be developed if excess capacity exists.

The City of Scappoose parks and recreation SDC was developed using a "combination approach" and includes only an "improvement fee" component.

A Capital Facilities Plan (CFP) designed to increase the LOS provided to all City residents during the next twenty years (1997 - 2016) has been developed and is included in section 3.0 Capital Facilities Plan. SDC's cannot be used to pay for eliminating deficiencies in the current LOS, or for providing a higher LOS than that which currently exists unless either (1) alternative revenue sources are identified to pay for eliminating existing deficiencies, or (2) the primary recipients of the higher LOS will be future residents. The CFP identifies the portion of the cost of each project that is intended to serve growth. Project costs which are attributable to growth may be funded through the use of SDC revenues, and remaining costs must be funded from non-SDC sources.

The growth-related portion of facilities costs identified in the CFP totals $7,864,226. The City has determined that SDC's will be used to fund 100% of the growth-related costs of neighborhood/mini park site acquisition and development, and 50% of the growth-related costs of community/school park site acquisition and development. These costs total $2,867,750. The remaining $4,996,476 in identified growth-related facility needs including linear park/trails, aquatics/athletics/community center, and 50% of community/school park site acquisition and development will be funded from non-SDC sources, such as grants, donations, bonds, partnerships, sponsorships, and combinations of these methods.

B. "Reimbursement fee" and "Improvement fee" SDC's

The Oregon Systems Development Act provides for the imposition of two types of SDC's: (1) "reimbursement" fees, and (2) "improvement" fees. Reimbursement fee SDC's may be charged for the costs associated with capital improvements which are already constructed or are under construction, and may be charged if "excess" capacity is available to accommodate growth. "Improvement" fees may be charged for new capital improvements that will increase capacity available for new development.

The standard for each facility included in this plan is based primarily on the current Level of Service (LOS) provided to City residents. The City currently owns an eighty (80) acre tract designated as a Forest/Natural Area Resource. The NRPA does not recommend the application of LOS standards to these types of facilities, so determinations of "capacity" cannot be made. The City does not yet provide any other facilities at levels which exceed those included in the standards; therefore, no excess capacity exists. The SDC is an "improvement fee" only and does not include a "reimbursement fee" component.

C. Credits

A credit is a reductions in the amount of the SDC which a development is required to pay. A credit must be allowed for the construction of a "qualified public improvement". A "qualified public improvement" is a capital improvement which (1) is required as a condition of development approval, (2) is identified in the capital improvement plan, and (3) either is not located on or contiguous to property that is the subject of development approval, or is located in whole or in part on or contiguous to property the subject of development approval and required to be built larger or with greater capacity than is necessary for the particular development project to which the improvement fee is related.

The credit for a qualified public improvement may only be applied against an SDC for the same type of improvement (i.e., parks and recreation, etc.), and may be granted only for the cost of that portion of an improvement which exceeds the minimum standard facility size or capacity (LOS standard) needed to serve the particular project. For multi-phase projects, any excess credit may be applied against SDC's that accrue in subsequent phases of the original development project.

In addition to these required credits, the City of Scappoose may, if it so chooses, provide a greater credit, establish a system providing for the transferability of credits, provide a credit for a capital improvement not identified in the capital improvement plan, or provide a share of the cost of an improvement, by other means. Credits which exceed those required by statute may be provided, but they must be applied uniformly to all development.

D. Nexus of Benefit

The "rational nexus of benefit" principle requires a reasonable connection (1) between the need for new parks and recreation facilities and growth from SDC-paying development, and (2) between the expenditure of SDC revenues and the benefits received by SDC-paying development. SDC revenues must be expended within a "reasonable" period of time (usually interpreted to mean within 10 years) in order for any benefits from new capital facilities to be considered timely.

The Capital Facilities Plan (CFP) identifies the capacity-increasing improvements planned for parks and recreation facilities in the City of Scappoose. Because the SDC is an "improvement fee" and includes no reimbursement component, the CFP provides the nexus of benefit between the SDC-paying development and the benefit to be received.

SDC revenues may be used to expand existing community facilities, add new community facilities, and add neighborhood facilities in order to meet the capacity needs created by growth. SDC revenues may not be used to add or expand facilities in order to alleviate deficiencies in built-out areas, or to construct facilities which are not related to growth; these needs must be addressed using non-SDC revenue sources.

The City's parks and recreation facilities are used, for the most part, by individuals and groups rather than businesses or other non-residential land uses, therefore the SDC for parks and recreation facilities is charged only to residential development.

E. Population Growth and Persons per Dwelling Unit

The SDC is based on projected growth-related capital costs per "capita" (person) and is calculated by dividing the growth related costs by the projected increase in population during the planning period (1996 - 2016). Estimated population growth was based on a population estimates included in a recent study of water needs for the City of Scappoose. The estimated population increase is shown in Table 4.1.

TABLE 4.1

ESTIMATED CITY POPULATION INCREASE

Projected 2016 Population		Estimated 1996 Population		Est. Increase in Population
9,821	-	4,130	=	5,691

The SDC is based on capital costs per capita and is charged based on the number of persons per dwelling unit. Dwelling units typically house different numbers of persons depending on the type of unit (i.e., single family, multi-family, etc.). To determine the appropriate number of persons per dwelling unit, census data maintained by the Center for Population Research and Census at Portland State University was analyzed, and the resulting calculations are displayed in Table 4.2.

TABLE 4.2

AVERAGE PERSONS PER DWELLING UNIT

Type of Unit	1990 Census Avg. Persons Per Dwelling Unit
Single-Family	2.91
Multi-Family	2.14
Manufactured Housing	2.28

5.0 CALCULATION OF PARKS AND RECREATION FACILITIES SDC's

City of Scappoose Parks and Recreation Facilities SDC is calculated using a series of formulas which identify:

a) the net growth-related facilities costs to be included in calculating the improvement fee component,,
b) the net growth-related facilities cost per capita
c) the compliance and administrative cost per capita.
d) the standard cost per capita, and
e) the SDC rates for each type of dwelling unit.

A. *Formula 1: Net Growth-related Facilities Costs*

The Net growth-related facilities costs to be included in calculating the SDC rates are determined by subtracting from the total growth-related costs (from the CFP) any estimated amounts that are expected to be paid from non-SDC sources, such as bonds or general tax revenues.

1.

Total Growth-Related Facilities Costs	-	Expected Funds From Other Sources	=	Net Growth-Related Facilities Costs

Table 5.1 presents the calculation of the net growth-related facilities costs.

TABLE 5.1

NET GROWTH-RELATED FACILITIES COSTS

Total Growth-Related Facilities Costs		Expected Funds From Other Sources		Net Growth-Related Facilities Costs
$7,864,226	-	$4,996,476	=	$2,867,750

B. Formula 2: Net Facilities Cost per Capita

The facilities cost per capita is calculated by dividing the net growth-related facilities cost by the expected increase in the City of Scappoose's population during the next twenty years.

2. Net Growth-Related Facilities Cost	÷	Population Increase	=	Facilities Cost Per Capita

Table 5.2 presents the calculation of the facilities cost per capita.

TABLE 5.2

FACILITIES COST PER CAPITA

Net Growth-Related Facilities Cost		Population Increase		Facilities Cost Per Capita
$2,867,750	÷	5,691	=	$504

C. Formula 3: Compliance/Administration Cost per Capita

ORS 223.307(5) allows the City of Scappoose to recoup the direct costs of complying with Oregon law regarding SDC's. Recoupable costs include consulting, engineering, and legal fees as well as the cost of accounting for revenues and expenditures. The total compliance/administrative cost is estimated to be 5% of collected SDC revenues. The compliance/administrative cost per capita is determined by dividing the estimated total compliance/administration cost by the estimated population increase during the planning period:

3. Total Compliance/ Administration Cost	÷	Population Increase	=	Compliance/Admin. Cost Per Capita

Table 5.3 presents the calculation of the compliance cost per capita.

TABLE 5.3

COMPLIANCE/ADMINISTRATION COST PER CAPITA

Total Compliance/ Administration Cost		Estimated Population Increase		Compliance/Admin Cost Per Capita
$ 143,350	÷	5,691	=	$25

D. Formula 4: Standard Cost per Capita

The Standard Cost per Capita represents the equivalent amount of revenue required from each new resident in order to pay for required capital facilities and pay compliance/administration costs. The calculation is completed by adding the facilities cost per capita (from Table 5.2) and the compliance/administration cost per capita (from Table 5.3).

4.	Facilities Cost Per Capita	+	Compliance/Admin Cost Per Capita	=	Standard Cost Per Capita

The results of this calculation are displayed in Table 5.4.

TABLE 5.4

STANDARD COST PER CAPITA

Facilities Cost Per Capita		Compliance/Admin Cost Per Capita		Standard Cost Per Capita
$504	+	$25	=	$529

E. Formula 5: SDC Per Dwelling Unit

The SDC Per Dwelling Unit is calculated by multiplying the average number of persons per dwelling unit (Table 4.2) by the Standard Cost Per Capita (Table 5.4).

5.	Persons Per Dwelling Unit	x	Standard Cost Per Capita	=	SDC Per Dwelling Unit

The results of these calculations are displayed in Table 5.5:

TABLE 5.5

SDC PER DWELLING UNIT

Type of Dwelling Unit	Average Persons Per Dwelling Unit	X	Standard Cost Per Capita	=	SDC Per Dwelling Unit
Single-Family:	2.91		$529		$ 1,539
Multi-Family:	2.14		$529		$ 1,132
Manufactured Housing: (in designated manufactured housing park)	2.28		$529		$ 1,206

The City has determined that manufactured housing which is sited in areas other than designated manufactured housing parks places a burden on facilities comparable to that of site-constructed single-family housing. Therefore, manufactured housing which is not located in a designated manufactured housing park will pay the same SDC as other single-family dwelling units.

6.0 ADDITIONAL FUNDING/FINANCING SOURCES

This section provides a description of a variety of alternative revenue sources which may be used to fund parks and recreation facilities and improvements. For each of the funding alternatives listed, there is a brief description and a short discussion of the potential for implementing the alternative in the City. The following is an overview of commonly used funding sources. Additional funding sources not

A. *General Obligation Bonds (G.O. Bonds)*

G.O. Bonds are debt instruments which may be sold by the City to fund new parks and recreation facilities, or make improvements to existing facilities. These are repaid with property tax revenue generated by a special levy that is outside the limits imposed by ballot measure #5 (1990), and #47 (1996). Voters must approve G.O. Bond sales. The City is experiencing rapid growth, and the assessed valuation of real and personal property within the City can be expected to increase substantially in future years because of the high level building activity and rising property values. This high rate of growth increases the City's debt capacity for financing needed facilities and makes G.O. Bonds a good option for supplementing SDC revenues to fund large projects or groups of projects during the next twenty years.

B. *Revenue Bonds/Certificates of Participation*

Revenue bonds and certificates of participation are debt instruments which commit specific revenue sources, such as service/user fees or special tax revenues for repayment of principal and interest on borrowed funds. Revenue bonds are widely used by utility and enterprise operations to fund large scale improvements, and they do not require voter approval. In order for them to be used for parks and recreation facilities would have to identify and pledge a non-ad valorem source of revenues, such facility user fees. A reliable long-term source of revenue is not currently available to commit for large scale projects. In order for revenue bonds and/or certificates of participation to be viable funding options, new revenue sources would be needed.

C. *Special Assessment/Local Improvement District*

Residents may choose to form a local improvement district (LID) to pay for capital improvements through special assessments on their property for a period of years. This method requires the approval of at least 60% of the owners of land within the proposed district, and must represent at least 60% of the land abutting the proposed improvement. The use of LID's may be appropriate for neighborhood parks.

D. *General Fund Revenues*

General funds revenues consist chiefly of property tax revenues derived from the voter approved tax base and operating levies, and are subject to the $10 combined limit on local government taxing agencies imposed by Measure #5 (1990), and the "cut and cap" limits imposed by Measure #47 (1996). General fund revenues may offer a limited source of funds for operations and maintenance, or for "pay-as-you-go" capital improvements. The restrictions and requirements imposed by ballot measures #5 and #47 make the use of current unrestricted general fund revenues very unlikely for parks and recreation operations and maintenance or capital improvements.

E. *Serial Levies for Capital Improvements*

A serial levy for capital improvements provides for a separate property tax levy outside the limits of ballot measure #5 and #47, to fund a specific list of projects over a specified period of time. This method is similar to a G.O Bond except that instead of borrowing a large amount all at once and then repaying the bonded debt, projects are scheduled and paid for on a "pay as you go" basis. These levies require voter approval and, per ballot measure #47, must receive that approval in a general election in an even numbered year, or in another election in which at least 50% of registered voters participate. The City could use this method to develop "packages" of projects to be completed over a specified period of years. Unlike bonds, this revenue source is "debt-free" and provides for funding without commitment of other revenues.

F. *User Fees and Rents*

User fees and rents are direct charges to individuals and groups who use specific programs, facilities and services. These fees and rents help pay a portion of the costs of providing programs and services. Any fees that are imposed as the result of conversion or a shift from ad valorem taxes require voter approval, per ballot measure #47. User fees generally are set at levels sufficient to cover only a portion of program and maintenance costs, and are rarely used to fund capital costs.

G. *Federal/State/Other Grants*

Grants from federal, state, and other government agencies, and foundations sometimes make funds available to serve specific purposes related to parks and recreation, such as land and water conservation, open space preservation, and blighted area improvement. Grants often have conditions and limitations, such as providing for project planning but not for construction, and/or they may require a local match, either in dollars, in-kind services, or both. The availability of grants has decreased in recent years due to federal and state cutbacks in funding. The City should explore the availability of grants to provide for needs identified in the twenty year master plan and for other worthwhile projects.

H. *Sponsorships/partnerships*

Public, private, and/or not-for-profit organizations may be willing to fund outright or join together or with the City to provide a facility and/or service for the community. The City has a rich history of public/private partnerships and sponsorship of recreation activities and facilities, making this a viable way of meeting some facility and programming needs.

7.0 CONCLUSION

The City's explosive growth will require a combination of techniques, including system development charges, bond revenues, and other sources to pay for capital facilities needed to serve the parks and recreation needs of current and future residents. As growth occurs and the demographics of the community change, the City's parks and recreation facility needs will also change and should be periodically monitored through the use of opinion surveys and similar techniques. The Capital Facilities Plan (CFP) should be reviewed and updated at least once every three years to reflect changes in parks and recreation facility needs. The System Development Charges methodology should also be periodically updated when significant changes are made to the CFP, and/or when cost estimates become outdated.

Summary of Key Findings From 1991 Survey

- Survey completed for Scappoose Park & Recreation District and Scappoose Library District by Institute of Recreation Research and Service; Department of Leisure Studies & Services and Department of Planning, Public Policy, and Management; University of Oregon.

- Survey mailed to 500 randomly selected households within City of Scappoose and surrounding regions; 124 completed survey questionnaires were returned (25%).

- Average length of residency of respondents: 17.6 years

1. Importance of factors to Quality of Life (in %) - Survey Question #1:

	Very Important	Important	Neutral	Not Important	Very Unimportant
Park Maintenance	21.0	48.5	26.3	1.0	3.0
Cultural Activities	8.0	33.0	45.0	6.0	8.0
Sports Programs	27.0	35.0	27.0	2.0	9.0
Youth Programs	47.6	39.8	8.7	1.0	2.9
Adult Programs	12.1	44.4	33.3	3.0	7.1
Family Activities	31.3	38.4	23.2	3.0	4.0
Senior Activities	28.0	43.0	23.0	4.0	2.0
Open Space	37.1	23.7	29.9	4.1	5.2
Bike Trails	26.3	33.3	24.2	10.1	6.1
Fishing Areas	27.0	36.0	27.0	3.0	7.0
Library Programs	n/a	n/a	n/a	n/a	n/a
Other	n/a	n/a	n/a	n/a	n/a