



# CITY COUNCIL MEETING

Monday, October 07, 2024 at 6:30 PM  
Sandy City Hall and via Zoom

## AGENDA

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### TO ATTEND THE MEETING IN-PERSON:

Come to Sandy City Hall (lower parking lot entrance) - 39250 Pioneer Blvd., Sandy, OR 97055

### TO ATTEND THE MEETING ONLINE VIA ZOOM:

Please use this link: <https://us02web.zoom.us/j/83099203316>

Or by phone: (253) 215-8782; Meeting ID: 83099203316

### WORK SESSION – 6:30 PM

1. [Development Services Department Code Enforcement Work Session](#)

### REGULAR MEETING – 7:00 PM

#### PLEDGE OF ALLEGIANCE

#### ROLL CALL

#### CHANGES TO THE AGENDA

#### PUBLIC COMMENT (3-minute limit)

The Council welcomes your comments on other matters at this time. The Mayor will call on each person when it is their turn to speak for up to three minutes.

-- If you are attending the meeting in-person, please submit your comment signup form to the City Recorder before the regular meeting begins at 7:00 p.m. Forms are available on the table next to the Council Chambers door.

-- If you are attending the meeting via Zoom, please complete the online comment signup webform by 4:00 p.m. on the day of the meeting:  
<https://www.ci.sandy.or.us/citycouncil/webform/council-meeting-public-comment-signup-form-online-attendees>.

#### RESPONSE TO PREVIOUS COMMENTS

#### CONSENT AGENDA

2. [City Council Minutes: September 16, 2024](#)

#### PRESENTATIONS

3. [Police Staffing Study Results](#)

## **ORDINANCES**

4. [PUBLIC HEARING - Ordinance 2024-18: Envision Sandy 2050 Adoption](#)

## **NEW BUSINESS**

5. [Contract Approval: Engineering Services for Alder Creek Water Treatment Plant Upgrades](#)
6. [Review of Applications for Appointment to Vacant City Council Seat #5](#)

## **REPORT FROM THE CITY MANAGER**

## **COMMITTEE / COUNCIL REPORTS**

## **STAFF UPDATES**

Monthly Reports: <https://reports.cityofsandy.com/>

## **ADJOURN**

Americans with Disabilities Act Notice: Please contact Sandy City Hall, 39250 Pioneer Blvd. Sandy, OR 97055 (Phone: 503-668-5533) at least 48 hours prior to the scheduled meeting time if you need an accommodation to observe and/or participate in this meeting.





# STAFF REPORT

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**Meeting Type:** City Council Work Session  
**Meeting Date:** October 7, 2024  
**From:** Kelly O’Neill Jr., Development Services Director  
Chris Relyea, Code Enforcement Specialist  
**Subject:** Development Services Department Code Enforcement Work Session

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## PURPOSE / OBJECTIVE:

The purpose of this code enforcement work session is to provide the City Council with some background information on what City staff are trying to accomplish with revisions to the Sandy Municipal Code. This code enforcement project is for code provisions that are enforced by the Development Services Department, not the Police Department, except for outdoor burning. No decisions from the City Council are being requested at this time.

## BACKGROUND / CONTEXT:

In the past, the City Council has requested changes to the Sandy Municipal Code (SMC) to standardize code enforcement processes. This request largely stemmed from tree removal and impacts to tree protection areas. Some of the primary reasons to revise the SMC include:

- Current code enforcement procedures vary across the chapters and sections of the SMC. Some code chapters have not been modified in decades.
- Remove outdated fine amounts from some chapters and instead refer to Title 1.
- Align penalty/fine amounts with regional averages for similar infractions.
- Standardize enforcement procedures to ensure equality in practice.
- Define procedures for repeat offenses, fine escalation, and irreversible infractions.
- The Business License code has not been revised since 1974. The Model Business License Ordinance provided by the League of Oregon Cities is being proposed.
- The Sign Code has First Amendment violations.

Staff has researched other municipalities statewide to gather and evaluate how to update the SMC to align with other municipalities and to standardize our code to increase deterrents for various violations. A code enforcement task force was formed by Mayor Pulliam. The Code Enforcement Task Force held a meeting on September 6, 2024. The task force focused on priorities, timelines for adoption, and wanted staff to make the following points clear:

- We want compliance, not money. The increased citation amounts are not being completed for the generation of revenue, but as an additional deterrent to violating the SMC.
- Larger fine amounts should be tied to violations of land use decisions rather than more basic homeowner violations.
- Ongoing citations are also a pathway for judicial foreclosure for properties with egregious violations that are not being resolved by the property owner.

The SMC contains all the laws ("ordinances") enacted by the City Council. Though a civil penalty (a fine) may be assessed for a civil infraction, it is not a criminal offense. Typical civil infractions include neighborhood nuisances such as noxious vegetation (weeds and grass), street tree mutilation, accumulation of rubbish or junk, obstructed sidewalks, and derelict structures. Other common civil infractions include illegal signs, business license violations, building code violations, and zoning violations. As a reminder, here is the division of responsibilities between the Development Services Department and the Police Department:

**Municipal Code Enforcement Responsibilities - City of Sandy**

Community Service Officer Sandy Police	Code Enforcement Specialist Development Services
<b>Contact:</b> Kevin Moody <b>Email:</b> <a href="mailto:kmood@ci.sandy.or.us">kmood@ci.sandy.or.us</a> <b>Phone:</b> (503) 489-2184	<b>Contact:</b> Chris Relyea <b>Email:</b> <a href="mailto:crelyea@ci.sandy.or.us">crelyea@ci.sandy.or.us</a> <b>Phone:</b> (503) 783-2587
Homeless issues & residential camping	Weeds & junk accumulation
Noise complaints	Mud & debris on streets
Animal issues	Residential property issues <sup>1</sup>
Graffiti	Street trees/hazard trees
Parking issues	Streets, sidewalks & public property
Abandoned vehicles	Land use issues
Outdoor burning	Commercial property & business issues <sup>2</sup>
Illegal dumping	Dangerous & derelict buildings
Violations of park rules	Signs & sign code

<sup>1</sup> - includes property line issues, fences, trash cans, etc.

<sup>2</sup> - includes business license issues, transit tax issues, "dark sky" & other lighting issues, etc.

**KEY CONSIDERATIONS / ANALYSIS:**

Our aspiration is to bring the following code chapters before the City Council by the end of 2024 or by the first quarter of 2025, including Chapter 1.16 General Penalty, Chapter 1.18 Civil Infraction Procedure, Chapter 5.04 Occupations, Professions and Business Tax, Chapter 8.22 Chronic Nuisance Properties, Chapter 8.36 Outdoor Burning, and Chapter 15.32 Sign Code. Other code chapters will have to come forward at another point in the future.

Here are some ideas that the task force wants staff to explore:

- Research other sanctions in addition to typical citations, such as a deposit equal to a percentage of the total project cost. This will require a discussion with our attorney.
- Research how to define and differentiate between homeowner violations and 'developer' violations. The task force wanted different citation schedules for the two. This will also require a discussion with our attorney.
- In the business license municipal code revisions make sure to provide an exception for vendors that only do business in Sandy at community events, such as Mountain Festival, Winterfest, and the Mt. Hood Farmers Market.
- In Chapter 8.22 of the SMC, add that the City Manager can declare properties as a chronic nuisance for violations that are in Title 8, 12, 15, 17, and so on.
- The City Manager wants staff to address outdoor burning regulations as Chapter 8.36 is not comprehensive and doesn't have specificity on violations or enforcement.

Title 1, Chapter 1.16 and Chapter 1.18 should be updated near the onset of this project as they should guide the majority of the chapters in the SMC. The sign code and business license chapters also need to be revised near the onset of this project as they currently have a penalty of \$100 referenced instead of what will be amended in Title 1.

**BUDGET IMPACT:**

None identified except for staff salary and attorney compensation. As stated above, increased fine amounts are not intended as a source of revenue; rather, compliance is the goal.

**LIST OF ATTACHMENTS / EXHIBITS:**

Exhibit A. Presentation



# Sandy Municipal Code Enforcement Procedure Updates

City Council  
October 7, 2024

# Introduction - Why update the code?

Item # 1.

- Current code enforcement procedures vary across the chapters and sections of the Sandy Municipal Code. Some code chapters have not been modified in decades.
- Remove outdated fine amounts from some chapters and instead refer to Title 1.
- Align penalty/fine amounts with regional averages for similar infractions.
- Standardize enforcement procedures to ensure equality in practice.
- Define procedures for repeat offenses, fine escalation, and irreversible infractions.
- The Business License code has not been revised since 1974. The Model Business License Ordinance provided by the League of Oregon Cities is being proposed.
- The Sign Code has First Amendment violations.

# Limitations

This code enforcement project is for code provisions that are enforced by the Development Services Department, not the Police Department, except for outdoor burning regulations.

## Municipal Code Enforcement Responsibilities - City of Sandy

Community Service Officer Sandy Police	Code Enforcement Specialist Development Services
<b>Contact:</b> Kevin Moody <b>Email:</b> <a href="mailto:kmoody@ci.sandy.or.us">kmoody@ci.sandy.or.us</a> <b>Phone:</b> (503) 489-2184	<b>Contact:</b> Chris Relyea <b>Email:</b> <a href="mailto:crelyea@ci.sandy.or.us">crelyea@ci.sandy.or.us</a> <b>Phone:</b> (503) 783-2587
Homeless issues & residential camping	Weeds & junk accumulation
Noise complaints	Mud & debris on streets
Animal issues	Residential property issues <sup>1</sup>
Graffiti	Street trees/hazard trees
Parking issues	Streets, sidewalks & public property
Abandoned vehicles	Land use issues
Outdoor burning	Commercial property & business issues <sup>2</sup>
Illegal dumping	Dangerous & derelict buildings
Violations of park rules	Signs & sign code

<sup>1</sup> - includes property line issues, fences, trash cans, etc.

<sup>2</sup> - includes business license issues, transit tax issues, "dark sky" & other lighting issues.

# Task Force

Item # 1.

Councilors: Hokanson, Sheldon, and Smallwood

Commissioners: Wagener

## **Meeting on September 6, 2024, and set these reminders:**

- We want compliance, not money. The increased citation amounts are not being completed for the generation of revenue, but as an additional deterrent to violating the Sandy Municipal Code.
- Larger fine amounts should be tied to violations of land use decisions, by developers, rather than more basic homeowner violations.
- Ongoing citations are also a pathway for judicial foreclosure for properties with egregious violations that no progress is being made or attempted by the property owner.



# Task Force

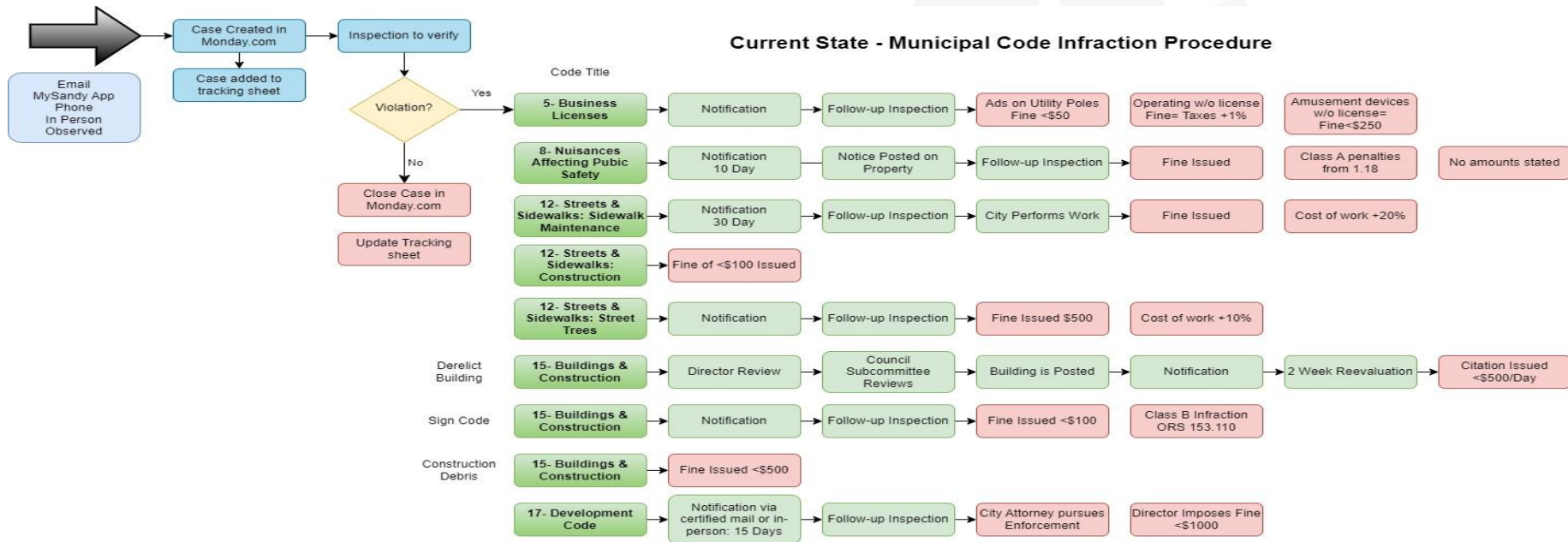
Item # 1.

- Research other sanctions in addition to typical citations, such as a deposit equal to a percentage of the total project cost. This will require a discussion with our attorney.
- Research how to define and differentiate between homeowner violations and 'developer' violations. The task force wanted different citation schedules for the two. This will also require a discussion with our attorney.
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- In Chapter 8.22 of the Sandy Municipal Code, add that the City Manager can declare properties as a chronic nuisance for violations that are in Title 8, 12, 15, 17, and so on.
- The City Manager wants staff to address outdoor burning regulations as Chapter 8.36 is not comprehensive and doesn't have specificity on violations or enforcement.



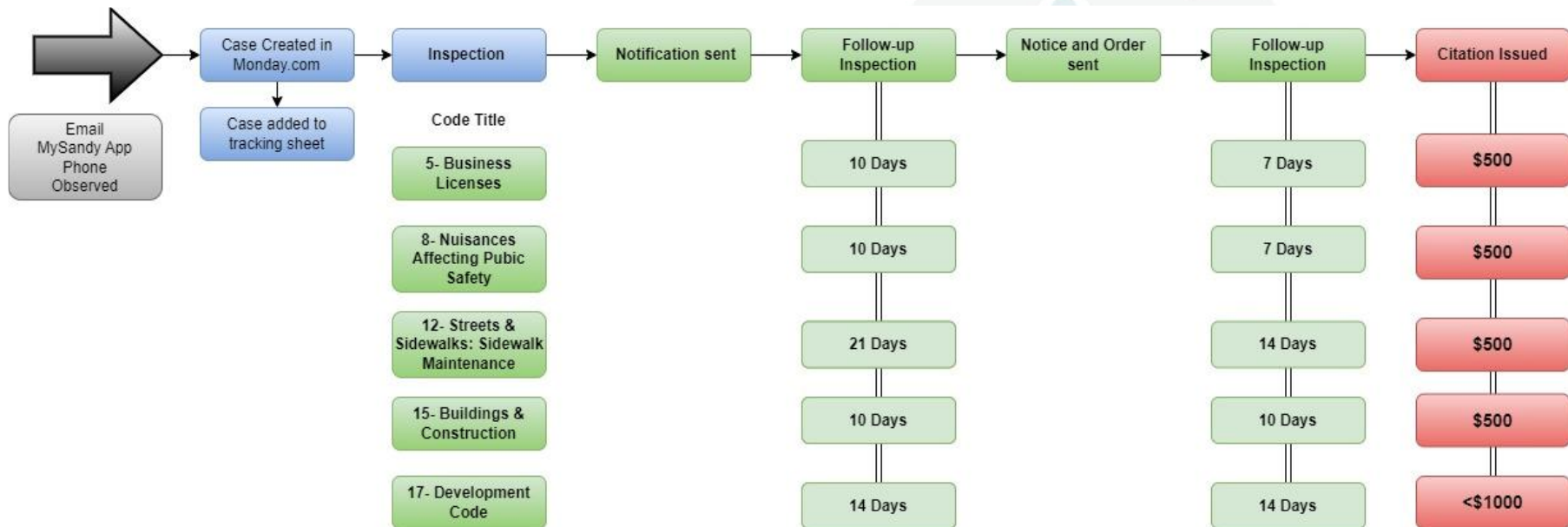
# Current Code Enforcement Procedures

Item # 1.



# Proposed Code Enforcement Procedures

Item # 1.



# Penalties in comparison with other Oregon municipalities

Item # 1.

SMC Title	1	5	8.16	12	12	15
Title Name	General	Bus Lic	Nuisances	Street Tree	Sidewalk	Sign Code
Sandy Current	up to \$500	\$100	up to \$500	up to \$500	Cost +15%	\$100
Proposed	\$250/\$500/\$1000	\$500	\$500	\$500	\$500	\$500
Happy Valley	\$150/\$2500	\$500	cost + 20%	\$150/\$2500	\$500	\$500
Gladstone	\$90/\$180/\$360/\$720	\$720	\$720	\$360	\$360	\$360
Lake Oswego	\$1,000	\$1,000	n/a	\$1,000	n/a	\$1,000
Milwaukie	\$150/\$500	\$500	\$500	\$500	\$250	\$250
Estacada	\$500	n/a	\$500	\$500	\$250	\$500
West Linn	\$500	\$500	\$500	\$500	\$200	\$500
Wilsonville	\$500	\$500	\$1,000	\$500	cost	\$100
Oregon City	\$300	\$300	\$300	\$300	\$300	\$300
Clackamas County Averages	\$450	\$525	\$565	\$523	\$310	\$439
Bend	\$200/\$400/\$750	\$750	\$0	\$750	cost	\$750
Hillsboro	\$500	5% per month	\$0	\$500	Cost +15%	\$500
Tualitin	\$100/\$250/\$500	\$500	10-50-250-500	\$100	cost	\$250
Ashland	\$138/\$200/\$325/\$500	\$500	\$325	\$200	\$500	\$500
Astoria	\$1,000	\$250	up to \$1000	up to \$1000	up to \$1000	up to \$1000
Aurora	\$500	\$500	\$500	\$500	\$500	\$200
Corvallis	\$100	\$300	\$1,000	\$500	\$250	\$100
Salem	\$2,000	\$2,000	up to \$2000	\$2,000	\$2,000	\$2,000
Sherwood	\$500	\$500	\$500	\$500	n/a	\$500
Troutdale	\$1,000	\$300	\$1,000	\$1,000	n/a	\$100
Hood River	\$500	\$100/\$250/\$500	\$500	\$500	cost	\$250
Beaverton	\$100/\$250/\$500	\$500	\$500	\$500	\$500	\$500
Newport	\$500	\$500	\$1,000	\$500	\$500	\$200
Statewide Averages	\$522	\$475	\$500	\$517	\$351	\$488

# Proposed Penalty Updates

Item # 1.

## Current Fine Amounts:

General Provisions = up to \$500

Business License = \$100

Nuisance = up to \$500

Sidewalks = Cost of Repair + 15%

Sign Code Violation = \$100

Building and Construction = \$100 - \$1,000

Development Code = up to \$1,000

## Proposed Fine Amounts:

Class C = **\$250**

Class B = **\$500**

Class A = **\$1,000**

**Repeat Offenses escalate to the next class of infraction.** Example: If a class B infraction is repeated by the same individual or business the new offense is a class A infraction. If a class A infraction is repeated, the penalty is doubled.

# Proposed Penalties for Irreversible Violations

Item # 1.

## Damaged and Destroyed Trees:

Street trees: \$500 per tree

Trees on existing lots: \$1,000 per tree

Trees removed during development: \$5,000 per tree

## Hillside Disturbance / Wetland Disturbance:

Existing lots: \$1,000

Disturbance during development: \$5,000

## Damaged and Destroyed Tree Fines:

Current Sandy	up to \$1000
Milwaukie	\$60 - \$675
Camas	\$250 - \$1000
West Linn	\$500
Eugene	\$250 - \$4400
Woodburn	\$5000 - \$10000
Happy Valley	\$500 - \$2500
Canby	up to \$500
Troutdale	up to \$1000
Portland	\$225 - \$1000
Redmond	up to \$3000
<b>Average</b>	<b>2000</b>

# Next Steps

Item # 1.

## 2024/early 2025 (not in order of Council review)

- General Penalty Chapter 1.16
- Civil Infraction Procedure Chapter 1.18
- Business License Code Chapter 5.04
- Chronic Nuisance Properties Chapter 8.22
- Outdoor Burning Chapter 8.36
- Sign Code Chapter 15.32

## 2025/2026

- Irreversible Violations (tree removal, wetland disturbance, etc.)
- Tree Code Chapter 17.102

# Input

Item # 1.

Is there any additional input that the City Council would like to provide staff as we move forward with the Municipal Code updates?



# CITY COUNCIL MEETING

Monday, September 16, 2024 at 6:00 PM  
Sandy City Hall and via Zoom

## MINUTES

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### WORK SESSION

#### 1. Housing Production Strategy (HPS) Introduction

The City Manager introduced the discussion; Kelly Reid with DCLD, and Beth Goodman and Nicole Underwood with ECONorthwest, were present to deliver the presentation. Slides were included in the agenda packet.

Council discussion ensued on the following issues:

- Clarification on the meaning of 'contextualized housing need' with regard to the City's Housing Capacity Analysis as well as any additional data gathered through the HPS process (quantitative as well as qualitative)
- Concern about state regulations being ill-suited to the City's wastewater issues and inability to produce housing; suggestion that centralized housing policy from the state is problematic
  - Suggestions to pursue housing strategies that are possible while the development moratorium remains in effect
  - Note that the Development Services Director submitted rulemaking comments urging the state to take situations like Sandy's into account
  - Suggestion that the Acceleration Program could potentially connect Sandy with helpful resources
- Recognition that housing production in Sandy is also limited by drinking water system needs
- Discussion on the number of homeless individuals in Sandy; recognition that there are a variety of ways in which people can experience homelessness
- Questions as to why employers were not consulted during the stakeholder interview process
- Suggestion that housing needs should be addressed for those at all income levels (market rate housing as well)
- Clarification on the planning horizon of the HPS
- Concern about the impact of high utility bills on housing affordability
- Questions on how the stakeholder feedback gathered through this process compares to other cities
- Discussion on the need for services to be available for some low income housing types; suggestion that providing such services is not the City's role
- Examples of actions the City could take such as providing public land, and easing design requirements to facilitate low income housing production



- Suggestion to better advertise low income utility assistance programs
- Desire for more clarity on expedited permitting programs
- Discussion as to whether Council support exists for providing urban renewal funds to support affordable housing
- Questions as to whether it is appropriate to commit future councils to measures like a construction excise tax
- Discussion on how accountability for accomplishing the strategies in the HPS will work, especially given the City's development moratorium situation; suggestion that the City should focus on strategies that are indeed possible at this time
- Concern that the state is still in the process of rulemaking, though the City is being required to make housing policy commitments while those rules remain uncertain
- Suggestion to make it clear in the HPS document that the City is extremely limited in the amount of new housing that can be supported at this time; that the production bar should be low
- Suggestion that the City can pursue a number of strategies at this time that include simply gathering data (such as with short term rentals) and preparing to implement policy actions in the future
- Note that the City's HPS is subject to review and approval by DLCD; suggestion that DLCD may be able to provide grant funding to assist with the planning process
- Concern that the City cannot meaningfully support housing production without substantial funding assistance from the state to help solve utility system problems
- Suggestion that it is in fact regulatory requirements beyond the City's control that are the true drivers of cost for housing; those drivers should be addressed instead
- Recap of the number of needed housing units identified in the City's HCA
- Discussion of the HPS planning processes being pursued in wealthier communities; note that the state will be purposefully addressing affordability disparities in such communities
- Frustration that Sandy may not be getting credit for past measures taken to ensure provide housing choice for consumers; emphasis on the need to maintain a balance of housing densities
- Direction to staff to send any feedback from Planning Commissioners to the Council

## **REGULAR MEETING**

## **PLEDGE OF ALLEGIANCE**

## **ROLL CALL**

### **PRESENT**

Council President Laurie Smallwood  
 Councilor Chris Mayton  
 Councilor Rich Sheldon  
 Councilor Kathleen Walker  
 Councilor Don Hokanson

### **ABSENT**

Mayor Stan Pulliam

## CHANGES TO THE AGENDA

(none)

## PUBLIC COMMENT (3-minute limit)

Kevin Moss: expressed concerns regarding the bollards in the roadway on Proctor Blvd, which are a traffic hazard issue. Also expressed concern about the proposed volunteer time off policy, stating that staff should be focused on their official duties.

## RESPONSE TO PREVIOUS COMMENTS

(none)

## CONSENT AGENDA

2. City Council Minutes: September 3, 2024
3. Contract Amendment 3: Veolia Water North America – West, LLC
4. Amended Approval for the Public Improvement Contract for the Construction of Cedar Park (Goodfellows Bros. LLC.)

### **MOTION: Adopt the consent agenda**

Motion made by Councilor Sheldon, Seconded by Councilor Mayton.

Voting Yea: Council President Smallwood, Councilor Mayton, Councilor Sheldon, Councilor Walker, Councilor Hokanson

### **MOTION CARRIED: 5-0**

## NEW BUSINESS

5. Volunteer Time Off Policy

The City Manager summarized the staff report, which was included in the agenda packet.

Council discussion ensued on the following issues:

- Whether coaching of youth sports teams can be added as an eligible volunteer activity
  - Questions as to whether such leagues are qualifying non-profit organizations
  - Discussion on the eligibility of regional sports organizations that serve Sandy as well as other areas
- The importance of ensuring that volunteer time benefits the local community
- Whether any organization in Clackamas County should be eligible
- The number of hours per day should be allowed for paid volunteering
- The importance of the proposed policy for staff retention
- Possible concerns with staff serving on non-profit boards
- The primary importance of ensuring that paid volunteering occurs for organizations that serve Sandy residents

**MOTION: Authorize the City Manager to implement the volunteer time off policy as outlined in the attached document, with the amendment that the policy will explicitly include as eligible: 'organizations that serve residents of Sandy.'**

Motion made by Councilor Walker, Seconded by Councilor Sheldon.

Voting Yea: Council President Smallwood, Councilor Mayton, Councilor Sheldon, Councilor Walker, Councilor Hokanson

**MOTION CARRIED: 5-0**

6. League of Oregon Cities 2025 Legislative Priorities

The Deputy City Manager summarized the staff report, which was included in the agenda packet.

Council discussion ensued on the following issues:

- Whether it is possible to simply cast all five of the City's votes for infrastructure funding
- The importance of recreational immunity for Cedar Park
- The expected prominence of transportation funding for the next legislative session
- Nellie deVries' observations on the upcoming legislative session, and the Legislature's rationale for prioritizing transportation at this time
- The importance of assistance with infrastructure funding if more housing is desired by the state
- Questions as to whether the Governor will champion infrastructure funding again
- Discussion of the priority order of the five items; suggestion that lodging tax flexibility is the least important of the five listed priorities

The consensus of the Council was that staff should attempt to cast all of the City's votes for the Infrastructure Funding priority; if that is not possible, staff should move forward with the five priorities identified in the staff report.

## REPORT FROM THE CITY MANAGER

- Update on current applicants for Council Seat #5; suggestion from the Council to advertise the vacancy on Facebook as well
- Staff is gathering quotes for flashing crosswalk lights to install along Hwy 26 downtown; suggestion from the Council to explore additional safety measures such as disallowing parking immediately adjacent to crossings
- Update on the C-4 joint values and outcomes statement draft; consensus from the Council to add Sandy's endorsement in the interest of being cooperative

## COMMITTEE / COUNCIL REPORTS

### Councilor Hokanson

- Concerns about skateboards on sidewalks and possible danger to pedestrians
- Discussion about whether motorized scooters are allowed on sidewalks

- Update on the Mayor's request for him and Councilor Mayton to facilitate a review process for the City Manager; the intent is to proceed with a 360 review approach to gather feedback from Council, staff, and community/peers. The Council agreed with the approach.

#### Councilor Walker

- The Library Advisory Board continues to review strategic plan performance
- Further discussion is needed with the Council about the Library District
- City should review which downtown crosswalks are marked and which receive enhanced safety measures such as flashing lights
- Concern about traffic access to the Dutch Bros site; questions as to why U-turns are not allowed at the adjacent intersection
- The Council should receive updates on school parking/traffic issues
- Further discussion is needed about rock hauling on Bluff Rd.

#### Councilor Sheldon

- Thanks for the Council's support on the volunteer time off policy
- Concerns about the Housing Production Strategy policy from the state, and in particular the top-down approach. Sandy should not be subject to the same requirements because of the wastewater capacity problems and the consent decree
- Questions about whether short term rentals have a significant impact on the housing market
- Reminder of the upcoming tour of the Alder Creek water plant

#### Councilor Mayton

(none)

#### Council President Smallwood

- Recap of recent tour of Cedar Park; suggestion that measures are needed at the site to ease law enforcement such as fencing and a parking lot gate

### **STAFF UPDATES**

Monthly Reports: <https://reports.cityofsandy.com/>

### **ADJOURN**

**EXECUTIVE SESSION:** The Council met in executive session pursuant to ORS 192.660(2)(f) & (h)



# STAFF REPORT

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**Meeting Type:** City Council  
**Meeting Date:** October 7, 2024  
**From:** Tyler Deems, City Manager  
**Subject:** Police Staffing Study Results

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## PURPOSE / OBJECTIVE:

During the budget process in Spring 2023, the City Council allocated \$30,000 to conduct a staffing study for the Sandy Police Department. Berry Dunn was selected to conduct the study, which kicked off in fall 2023. Interviews were conducted with staff, community members, and two elected officials to gain a better understanding of current department needs. Berry Dunn provided a draft of the report several months ago, but due to staffing changes and capacity related issues, it's taken longer than anticipated to review the result, provide comments, and get to a final draft.

Council will receive a presentation by Michele Weinzetl, Senior Manager from Berry Dunn highlighting the process and key recommendations. Kim Yamashita, former Interim Chief of Police and Patrick Huskey, Chief of Police will be in attendance to answer any questions from the Council regarding the department.

The Council should ask any questions related to the report, findings, and recommendations. Ultimately, staff is seeking direction from the Council to move forward with identifying the best approach to implement the recommendations from the study. The implementation plan will be brought back to the Council for review at a future Council meeting. The plan will include relevant funding mechanisms for implementation.

## KEY CONSIDERATIONS / ANALYSIS:

The current budget for the Sandy Police Department supports 20 total FTE. Of this, 16 are sworn officers (Chief, Sergeant, Patrol, Detective) and 4 are nonsworn (Community Services and Records). At this point in time, there are three vacancies that the department is working to fill.

Additionally, the City is in the final stages of entering into an intergovernmental agreement with Clackamas County, where the County will pay for 80% of the cost of Community Services Officer to specialize in homelessness response and outreach. This new position will help with the current volume of calls related to homelessness issues but will not be able to provide the same level of support to the department as a sworn officer would.

The report recommends hiring three additional sworn officers. Below is consolidated information on the annual cost of a sworn officer:

One-Time Equipment and Vehicle:	\$77,000
Ongoing Annual Equipment and Other:	\$2,500
Annual Salary and Benefits:	\$140,000
Total First Year Cost for One Officer:	\$219,500

While the report notes the need for three additional sworn officers, internal analysis of current call volume, optimal staffing, and shift coverage would indicate a total of four sworn officers.

It's also important to note that the report does not recommend any additions or changes to Records staff. However, the impact of additional officers would likely add more work to the Records department and a future increase in FTE may be needed.

**BUDGET IMPACT:**

None currently. This discussion serves to inform the Council of the findings of the report and begin a conversation as to how the City will implement recommendations from the findings.

**RECOMMENDATION:**

Receive information, discuss the results of the staffing study, provide direction to staff to determine the best approach for implementing the recommendations from the findings.

**LIST OF ATTACHMENTS / EXHIBITS:**

- Berry Dunn Staffing and Key Operations Review
- Presentation Slides



# City of Sandy, OR

Staffing and Key Operations Review



**Submitted by:**

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207.541.2200

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**Michele Weinzetl, Project Manager**

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## Introduction and Summary

The need for police agencies to deliver high-quality professional police services is at an all-time high. Communities and government officials have significant, but reasonable, expectations related to the efficient and effective use of the resources they have committed to the public safety mission. In turn, police officials have a responsibility to monitor and examine operational processes to help ensure they are optimally configured and are consistent with contemporary police standards and industry best practices.

In July of 2023, BerryDunn began working with the City of Sandy Oregon (City) to conduct a Staffing Review of the Sandy Police Department (SPD). This project included the following elements:

- › A workload-based analysis on staffing levels for patrol
- › A workload-based analysis on staffing levels for investigations
- › A review of other sworn and non-sworn positions and staffing needs
- › Future staffing projections
- › A review of response times, patrol zone layouts, and response efficiency
- › A review of targeted operational aspects of the department, assessed independently for the agency and in comparison, to prior police agencies studied and industry best practices:
  - » Personnel allocations by rank and unit
  - » Staff diversity
  - » Hiring, recruiting, and attrition rates
  - » Serious crime rates
  - » 21<sup>st</sup> Century Policing benchmarks
  - » Examination of the patrol work schedule in relation to service needs and demands
  - » A report on possible patrol work schedule design changes
  - » A review of the organizational leadership and culture

This report outlines the process and methodology BerryDunn used to conduct this study. The analysis provided by BerryDunn is balanced and fairly represents the conditions, expectations, and desired outcomes studied and the factors that prompted and drove this assessment. Where external data was used for comparison purposes, references have been provided.

Studies of this nature are predisposed toward the identification of areas requiring improvement, and accordingly, they have a propensity to present what needs work without fully acknowledging

and highlighting positive aspects of an organization. This report follows a similar progression. Although this report contains several areas for improvement, and the SPD has faced some challenges in recent years particularly related to staffing, BerryDunn made many positive observations of the SPD, and staff conveyed many positive aspects of the SPD.

## Positive Comments

BerryDunn had an opportunity to interview several staff members of the SPD from various ranks and assignments. As part of that process, BerryDunn asked staff to identify positive aspects of the organization, as well as areas requiring some attention. Staff provided BerryDunn with many positive comments. Those mentioned multiple times included:

- The quality of police services provided to the community by the department is very good.
- Members of the department feel the culture of the department is very strong and provides employees with a strong sense of pride and camaraderie.
- The department is invested in and engaged with the community.

Generally, when police staff are asked to identify positive or negative aspects of their jobs, the length of the negative items typically exceeds the positive ones, and often substantially. For the SPD, the opposite occurred. Although staff provided some information on areas that could use some improvement, most were minor, and all staff had more positive comments than suggestions for improvements. Although there are opportunities for improvement within the SPD, and this report will highlight several of them, BerryDunn is encouraged by the positive comments from those interviewed, and notes that this is a somewhat unusual—but encouraging—pattern within the department.

This assessment examined several primary areas of department operation (distributed throughout the sections of this report), as well as several sub-areas and specialized positions. BerryDunn's analysis determined that several areas within the police department require adjustment to assist the SPD in meeting service demands, improving operational efficiency, and meeting staffing demands. Overall, this study provides nine formal recommendations.

This report has been organized into five sections, each of which corresponds to a section of police organizational and/or operational function. Although each section is distinct, there is some repetition of information due to the overlapping nature of police operations and the value in refreshing certain data for the reader. This report has been written for three different but important audiences: government officials, police officials and staff, and community members. Accordingly, BerryDunn has worked to provide sufficient details so that anyone reading this report can readily understand each aspect. This report contains numerous acronyms. BerryDunn will introduce each acronym in the body of this report, and a full list of acronyms used is also available in Appendix B.

In conducting this assessment, BerryDunn utilized several varied strategies, including collection of historical data (e.g., computer records, dispatch, and crime data), creation of new data through surveys and worksheets, and on-site interviews. Following the collection of this



information, BerryDunn engaged a thorough analysis of the data, which resulted in various recommendations for the SPD. These recommendations, and this report, were subjected to significant review by subject matter experts, the study team, and BerryDunn staff, with an emphasis on working to ensure a quality product that provided recommendations that conform to industry standards and best practices. Once BerryDunn completed its review, the draft report was reviewed by the client to help ensure accuracy and relevance, and that all aspects of the project scope were addressed.




Within this final report and its appendices, BerryDunn has provided various tables and figures as visual aids and to validate and substantiate the observations of the team, as well as the associated recommendations.

The formal recommendations from this project can be found in three locations:

- First, a summary of the principal findings and recommendations is provided below. This is intended to provide consumers with a quick reference list of the formal recommendations made in this assessment.
- Second, recommendations are included at the end of each section to which they apply. Each recommendation is the result of the topical analysis from that section, and each includes a summary of the basis for the recommendation.
- Third, for ease of review, each of the full recommendations is included sequentially within Appendix A.

BerryDunn has separated formal recommendations into three prioritized categories in rank order. The seriousness of the conditions or problems that individual recommendations are designed to correct, their relationship to the major priorities of the community and the department, the probability of successful implementation, and the estimated cost of implementation are the principal criteria used to prioritize recommendations. Table 0.1 provides a description of the priority levels used for the recommendations.

**Table 0.1: Priority Descriptions**

Overall Priorities for Findings and Recommendations	
	<b>Critical/Priority</b> – These recommendations are very important and/or critical and the agency should prioritize these for action.
	<b>High/Primary</b> – These recommendations are less critical, but they are important and should be prioritized for implementation.
	<b>Medium/Non-Urgent</b> – These recommendations are important and less urgent, but they represent areas of improvement for the agency.

BerryDunn has provided a summary of the full recommendations and findings in the Principal Findings and Recommendations section of this report. The format of this information is provided in Table 0.2.

**Table 0.2: Short Recommendation Format**

[Section and Title]		
No.	Finding	Recommendation
1-1	<b>Brief Finding Statement</b>	<b>Succinct Recommendation Statement</b>

This format provides readers with a quick review of the findings and recommendations. The format for the full recommendations is included in Table 0.3. Each finding and recommendation includes a description of the details supporting the recommendation, as well as details regarding areas for agency consideration. Again, BerryDunn has provided each of the full recommendations in the body of the report and in Appendix A.

**Table 0.3: Full Recommendation Format**

[Section and Title]		
No.	Issue and Opportunity Description	Overall Priority
<i>Section and Subsection:</i>		
1-1	<b>Finding Area: (Finding Statement)</b> Supporting information regarding the finding.	
	<b>Recommendation: (Succinct Recommendation Statement)</b> Additional details concerning the recommendation, including items for consideration.	

## Department Involvement

The SPD provided BerryDunn unfettered access to staff and all data at its disposal, without reservation or hesitation. Based on BerryDunn’s interactions with the command staff at the SPD throughout this project, it was evident that they want what is best for the agency and the community and are willing to take the necessary steps to help ensure positive and appropriate change takes place. BerryDunn also wishes to express its appreciation for the opportunity to collaborate with the City and the SPD on this important project.

## Project Limitations

The scope of this project was limited to the areas identified above. In essence, this project involved a staffing study along with a review of certain operational elements, most notably those that affect staffing and operational efficiencies. During the project, BerryDunn made numerous observations related to operational conditions, and, where relevant, those observations have

been included within this report. This project, however, did not study the entirety of the SPD’s operations, and accordingly, there are some operational areas that BerryDunn did not review.

## Changing Conditions

The SPD is a dynamic and ever-changing organization. BerryDunn recognizes that changes might have taken place since the start of this review in July 2023. Understandably, it has been necessary to freeze conditions to prepare the report. The most current information on the conditions of the organization resides with the command staff of the police department, including information on actions that constitute consideration and implementation of the recommendations included in this report.

## Principal Findings and Recommendations

### Critical/Priority Findings and Recommendations

BerryDunn has no Critical/Priority findings and recommendations to report.

### High/Primary Findings and Recommendations

Section 2: Patrol Services		
No.	Finding	Recommendation
2-1	SPD does not have sufficient patrol staff to efficiently meet the patrol workload or the needs of the community. The Sandy community values the police department and in turn expects officers to be present at community events and engaged in community policing and proactive policing strategies.	SPD should add three additional sworn staff members.

Section 2: Patrol Services		
No.	Finding	Recommendation
2-2	The SPD does not currently formally engage the use of solvability factors as an element of conducting a preliminary criminal investigation.	The SPD should require the use of solvability factors by all staff who conduct preliminary criminal investigations and complete the associated reports.

Section 3: Investigations Services		
No.	Finding	Recommendation
3-1	The current schedule for investigators is not optimized and does not provide for persistent investigator coverage during normal business hours.	The SPD should revise its schedule for investigators so that the investigator is routinely scheduled during normal business hours.

## Medium/Non-Urgent Findings and Recommendations

Section 1: The Policing Environment		
No.	Finding	Recommendation
1-1	Although the SPD strives to exemplify the characteristics outlined in the 21 <sup>st</sup> Century Policing Task Force Report, there are several sections within the six main topic areas or “pillars” that may benefit from focused attention from the SPD.	The SPD should affirm its commitment to 21 <sup>st</sup> Century Policing and develop a process for pursuing, maintaining, and monitoring the department’s actions in pursuit of that goal.

Section 1: Policing Environment		
No.	Finding	Recommendation
1-2	SPD stopped reporting UCR data to the FBI in 2014 and has not reported NIBRS data.	NIBRS is an important tool for tracking crime trends nationally and on a regional and local level. SPD should commit to submitting NIBRS data to the FBI. BerryDunn notes that this is a stated goal of SPD’s.

Section 3: Investigations Services		
No.	Finding	Recommendation
3-2	The records management system (RMS) of the SPD can track and monitor case assignments and progress for investigations. The SPD is not maximizing the use of its RMS to monitor case assignments, and there is a lack of formal case review and tracking of reviews.	The SPD should take steps to more appropriately use the RMS to track and monitor case assignments and progress by investigators. Periodic case reviews for all open cases should be conducted and documented, consistent with department standards on case updates and expected closure dates.

Section 3: Investigations Services		
No.	Finding	Recommendation
3-3	The current supervisory structure of the Investigations Division is not optimal as patrol supervisors have several collateral duties.	BerryDunn recommends SPD revise the supervisory structure of the Investigations Division and assign the lieutenant as the division supervisor.

Section 4: Personnel and Hiring		
No.	Finding	Recommendation
4-1	The SPD has taken some steps to address their recent elevated attrition rates including take home vehicles, education stipend, and a retention bonus. SPD has not developed a formal retention plan to work toward reduced attrition.	SPD should develop a formal retention plan that leverages the talent and experience of the personnel within SPD.

Section 4: Personnel and Hiring		
No.	Finding	Recommendation
5-1	Authorized hiring levels at the SPD do not account for attrition rates.	To maintain optimal staffing levels, hiring should occur at the rate of allocated personnel <i>plus</i> the anticipated attrition rate.

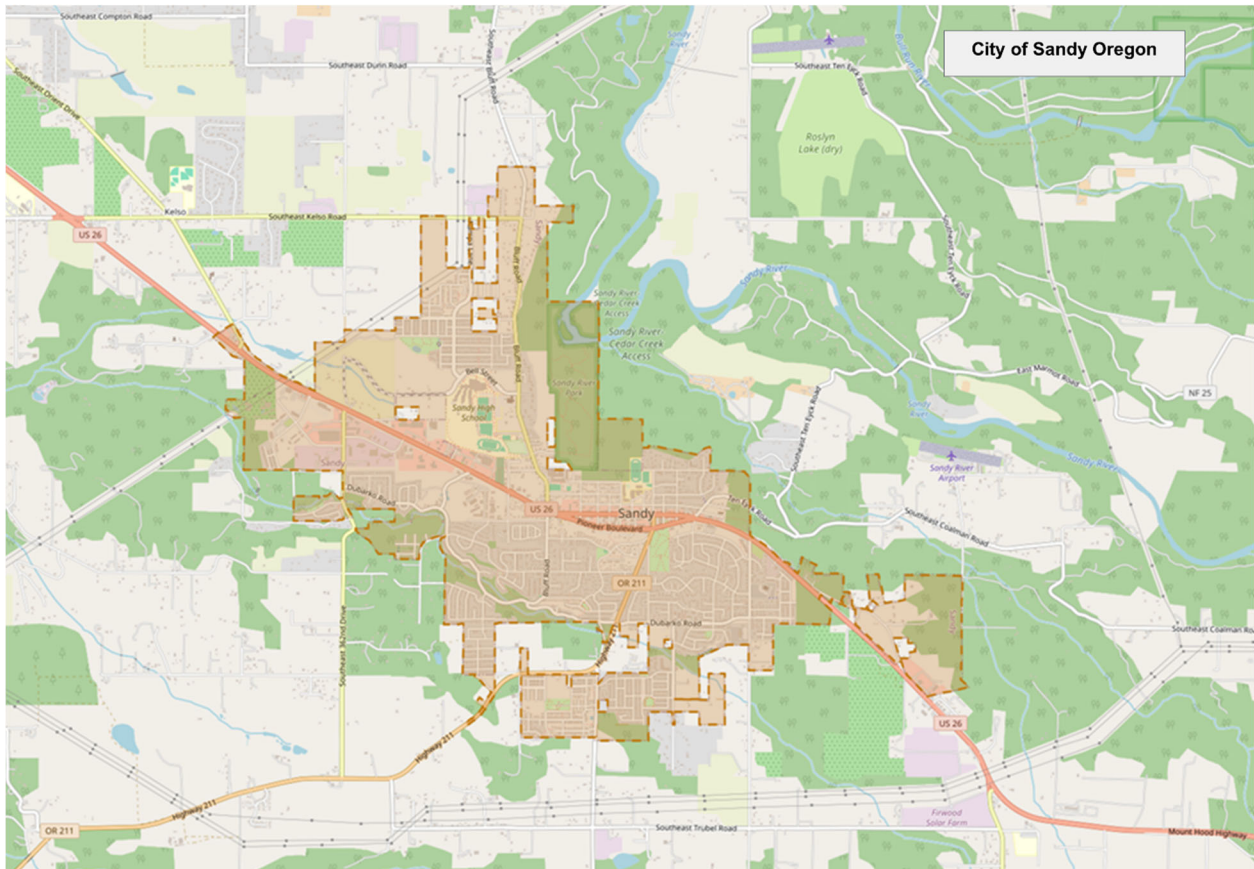
## 1.0: The Policing Environment

*This section includes an overview of the police setting, the service community, the structure of the government and police agency, personnel data, and crime and service data.*

### 1.1 Service Population

The City of Sandy is in northwestern Oregon and approximately 27 miles east of Portland. Figure 1.1 depicts a map of the City:

**Figure 1.1: Community Map**



Source: City of Sandy.maps.arcgis.com

The City is located in Clackamas County and is approximately 3.1 square miles in size as shown in Figure 1.1. The population of the City has increased by almost half since 2010, and as of 2021, the U.S. census estimated Sandy’s population at 12,953. Sandy is also projected to continue its growth with a population of 14,317 projected in 2030. Although population growth itself does not directly create the need for additional police staff or resources, workloads that result from population increases can have this effect.

**Table 1.1: City of Sandy (OR) Population Trends**

	2010	2020	2021	2030
Population	Census	Census	ACS Est.	Projected*
Population	9,570	12,612	12,953	14,317
Increase		3,042	341	1,364
% Change		31.79%	2.70%	10.53%

Source: U.S. Census Bureau

Based on projected growth, BerryDunn performed a series of calculations to determine the effect of the community growth on operational workloads for the SPD. The result of that analysis was that although workloads will undoubtedly increase with community growth, the staffing levels BerryDunn has recommended for the SPD are sufficient to absorb predicted growth through 2030, see Table 2.22 in Section 2. Based on BerryDunn’s calculations, population levels, and more importantly, the associated workload with that population, would need to exceed 15,000 persons before additional staffing beyond what BerryDunn is recommending, would need additional consideration. Of course, if workload demands were to increase dramatically, the additional workload could alter this prediction.

Table 1.2 shows the demographic breakdown of the City based on the 2020 census. This table shows that the population of Sandy is predominantly white, with those of multiple races making up the largest non-white segment of the population, at 9.18%.

**Table 1.2: Community Demographics**

Community Demographics (2020)	Total	Percent
White	10,553	83.67%
African American	87	0.69%
American Indian and Alaska Native	163	1.29%
Asian	174	1.38%
Navie Hawaiian or Pacific Islander	35	0.28%
Other	442	3.50%
Multiple Races	1,158	9.18%
<b>Total</b>	<b>12,612</b>	

Hispanic or Latino	1,226	9.72%
Not Hispanic or Latino	11,386	90.28%

Source: U.S. Census Bureau

Those of Asian descent comprise the next largest demographic, at 1.38%. African Americans make up 0.69% of the overall population. Table 1.2 also shows the breakdown of the American

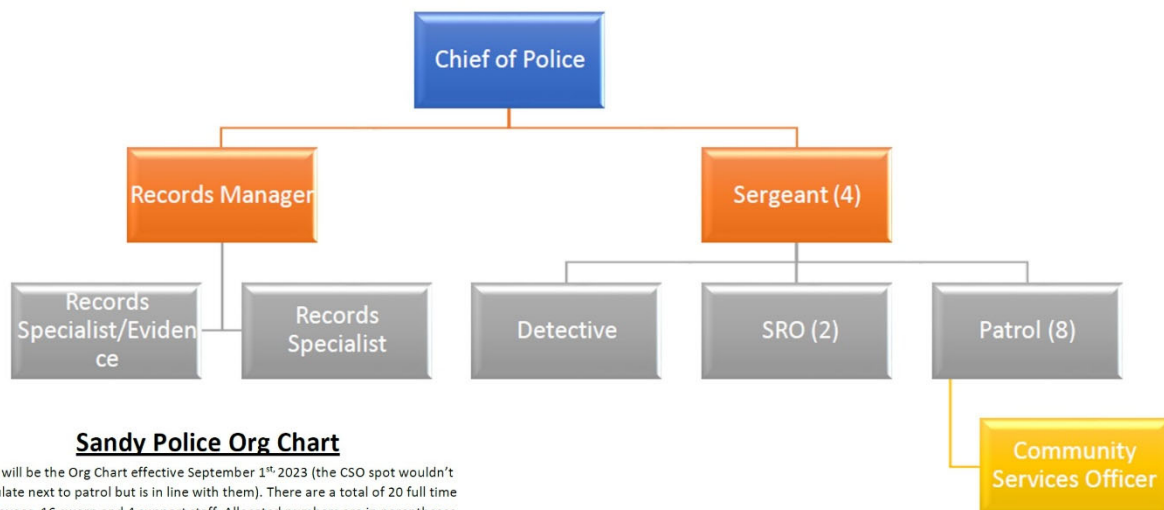


Indian or Alaskan Native and the Native Hawaiian or Pacific Islander population in Sandy. These groups make up 1.29% and .28% respectively of the population in Sandy. Although not considered a separate race, Table 1.2 also shows the breakdown of the Hispanic or Latino population in Sandy. Those who identify as Hispanic or Latino make up 9.72% of the diversity of the population within Sandy.

## 1.2 Police Department Staffing and Organization

This next section reflects the organizational structure and staffing levels of the police department, including historical staffing levels and current personnel allocations. Figure 1.2 reflects the current structure of the police department, which is split into two main divisions: patrol/investigations and administration. The Administration Division encompasses records and evidence management.

**Figure 1.2: Sandy PD Organizational Chart**



Source: Agency Provided

Based on BerryDunn’s review, the current organizational structure provides a functional distribution and grouping of duties and responsibilities for the divisions. Overall, spans of control are appropriate; however, BerryDunn notes the supervisory structure within SPD is relatively fluid. A position that was previously allocated as a lieutenant was recently re-allocated as a sergeant, making four sergeants, and removing a clearly defined second in command. BerryDunn understands SPD’s desire to have four first line supervisors and 24/7 supervisory coverage. BerryDunn also recognizes that the removal of this middle management position adds additional administrative duties to the sergeant’s role which inherently takes away from their time supervising employees and answering Calls for Service (CFS). (BerryDunn will expand on this later in the report).

The historical staffing levels of the police department for the past five years are presented in Table 1.3. This table reflects actual staffing levels at the time the SPD reported this data to the



FBI UCR for each of those years (2018 – 2022). BerryDunn elaborates further on the patrol staffing numbers in Section 3 of this report.

**Table 1.3: Historical Staffing Levels**

Year	Population	# of Sworn	# of Non-Sworn
2018	10,834	15	3
2019	11,070	15	3
2020	12,612	15	4
2021	12,383	14	4
2022	12,592	16	4

Source: FBI Uniform Crime Reports

Table 1.4 shows the current number of allocated sworn positions for the SPD for 2023, broken out by major unit of assignment. The data in Table 1.4 presents an important distinction from the data in Table 1.3 because it helps to illustrate the allocated staffing levels of the police department over these periods, not the number of actual positions filled at the time that data was reported. This is important because optimal workload models are predicated on ensuring full staffing to maximize operational efficiency. Personnel fluctuations work against operational efficiency, and it is necessary to minimize these fluctuations to achieve the best results.

**Table 1.4: Staffing Level Allocations by Unit**

Section	Sworn Personnel		Non-Sworn Personnel	
	Supervisor	Officer	Supervisor	Employee
Command Staff	1			
Operations/Patrol	4	8		
Investigations		1		
School Resource Officer (SRO)		2		
Code Enforcement				1
*Records and Property/Evidence			1	2
<b>**Subtotals</b>	<b>5</b>	<b>11</b>	<b>1</b>	<b>3</b>
<b>Totals</b>	<b>16</b>		<b>4</b>	

\*Records and Property/Evidence are separate units. One supervisor, two employees, one spends 50% in Records and 50% in property and evidence.

\*\*Includes Vacancies

Source: Agency Provided Data

Table 1.5 shows the current number of allocated sworn positions for the SPD for 2023, broken out by rank. Similar to Table 1.4, Table 1.5 provides staffing allocations, not necessarily the number of positions filled.

**Table 1.5: Personnel Allocations – Most Recent Year**

Section	*Total Number
Executive (Chief, Assistant/Deputy Chief)	1
Mid-Rank (Below Chief – Above Sergeant)	0
Sergeants (All – Regardless of Assignment)	4
Patrol Officers (Excludes Supervisors Above)	8
Investigations (Excludes Supervisors Above)	1
<b>Other Sworn Personnel</b>	
SROs	2
<b>Total Sworn</b>	<b>16</b>
<b>Non-Sworn Personnel</b>	
Community Service Officer	1
Records and Property/Evidence	3
<b>Total Non-Sworn (four personnel, three FTE's)</b>	<b>4</b>
<b>*Totals</b>	<b>20</b>

\*Includes Vacancies

Source: Agency Provided Data

Table 1.6 shows the percentage of personnel allocated within the organizational structure for the benchmark cities and several prior study cities, and the comparison to the personnel allocations within the SPD.

**Table 1.6: Personnel Allocation Comparisons**

	Population	Authorized Officers	Executive	Mid-Level Supervisors	First-Line Supervisors	All Officers
<b>Benchmark Averages</b>	<b>172,795</b>	<b>236</b>	<b>3.19%</b>	<b>3.49%</b>	<b>11.75%</b>	<b>81.57%</b>
<b>Prior Studies – 100+ Officers</b>	<b>221,256</b>	<b>327</b>	<b>2.63%</b>	<b>5.38%</b>	<b>11.82%</b>	<b>80.17%</b>
<b>Prior Studies – Under 100 Officers</b>	<b>27,012</b>	<b>43</b>	<b>2.75%</b>	<b>7.06%</b>	<b>16.86%</b>	<b>73.33%</b>
<b>Sandy PD</b>	<b>12,592</b>	<b>16</b>	<b>1</b>	<b>0</b>	<b>4</b>	<b>11</b>
Percentages			<b>6.25%</b>	<b>0.0%</b>	<b>25.00%</b>	<b>68.75%</b>

\*Table includes data from prior studies conducted by the IACP.

Note: Executive includes the Chief of Police and two steps below.

Mid-Level includes three steps below the Chief, to one step above line-level supervisor

SPD's comparison data in table 1.6 deviates from the prior study averages in departments of less than 100 sworn officers. First (based on the organizational configuration at the time of this study) BerryDunn notes that SPD does not have a mid-level supervisor, the average percentage of mid-level supervisors from prior studies is 7.06%. If SPD allocated just one person to this role it would account for 6.25% of their staff and still fall below the prior studies average. Secondly, first-line supervisors at SPD account for 25% of the staff while the prior studies average for departments of under 100 officers is 16.86%. As noted above BerryDunn acknowledges the SPD's desire for continuity of supervision across patrol shifts but also points out the lack of mid-level supervision is creating additional administrative work for the first-line supervisors. BerryDunn notes that with an authorized strength of just 16 sworn officers the reallocation of just one position can significantly change percentages.

Although there is no definitive standard, a general rule regarding span of control is one supervisor for every five followers (those supervised by someone else), although some have suggested this ratio could be higher, at one supervisor for every 8 to 10 followers.<sup>1</sup> To a certain extent, the span of control number is fluid, based on the personnel being supervised, their relative capabilities, and the deployment of personnel. Based on the data provided in Table 1.6, the overall span of control for patrol staff is one to three. The sworn ratio seems low; however, it is reasonable when considered against the organizational structure, shift disbursements, and the expressed desire to maintain continuity of supervision across the patrol schedule. As

<sup>1</sup> [http://highered.mheducation.com/sites/007241497x/student\\_view0/part2/chapter4/chapter\\_outline.html](http://highered.mheducation.com/sites/007241497x/student_view0/part2/chapter4/chapter_outline.html)

indicated, BerryDunn is recommending the SPD examine the current patrol schedule and consider making minor adjustments that may more efficiently staff shifts.

In Table 1.7, BerryDunn has provided comparisons regarding the distribution of personnel to patrol and investigations. The SPD currently allocates 70.58% of its sworn officers to the Patrol Division, and 6.25% are allocated to the Investigations Division.

**Table 1.7: Patrol and Investigations Comparisons**

Cities	Total Officers	Assigned to Patrol	Percent of Officers	Assigned to Investigation	Percent of Officers
<b>Benchmark City Averages</b>	<b>236</b>	<b>132</b>	<b>55.93%</b>	<b>30</b>	<b>12.71%</b>
<b>Prior Studies – Under 100 Officers</b>	<b>269</b>	<b>161</b>	<b>59.85%</b>	<b>38</b>	<b>14.13%</b>
<b>Prior Studies – 100+ Officers</b>	<b>3270</b>	<b>1657</b>	<b>50.67%</b>	<b>642</b>	<b>11.11%</b>
<b>Sandy PD</b>	<b>16</b>	<b>12</b>	<b>70.58%</b>	<b>1</b>	<b>6.25%</b>

\*Table includes data from prior studies conducted by the IACP.

Note: Patrol excludes specialty assignments (e.g., K-9, Traffic) and division commanders (Lieutenants) and above. Investigations includes intelligence, task forces, narcotics, and general investigations.

The personnel distribution for patrol is higher than the benchmark averages and the average of the other studies; that is a good thing. Having a high percentage of officers allocated to patrol suggests an appropriate focus on primary CFS response, and the high percentage reflected for the SPD indicates a commitment to this. It is worth noting that despite the high percentage of officers assigned to patrol other sworn staff, including the chief often respond to CFS to fill gaps, manage patrol workloads, and help ensure responsible response times. The allocation of investigators at the SPD is lower than the comparisons; however, as BerryDunn will point out later in this report, the number of personnel assigned for criminal investigations is sufficient given the workload.

### 1.3 Non-Sworn Personnel

#### Records

The purpose of the Records Division is to process all police reports, perform data entry, update case dispositions, and to provide customer service to the public. Evidence and property management is also managed by the Records Division. At SPD, records needs are handled by the non-sworn administrative staff. They manage records, evidence, public disclosures, and records requests, as well as managing EFORCE, the RMS. BerryDunn notes that, in addition to EFORCE, SPD is using e-citation, Report Beam, and Class Web. None of these systems are integrated, creating regular challenges in communication and redundant data entry. The Records Division acts as the primary point of contact for the prosecutor’s office and are the

initial point of contact for walk-in customers who visit the police department. Records also take and route phone calls.

The Records Division is currently staffed with one records division manager who oversees the unit, one records and evidence specialist, and one records specialist.

## 1.4 Operations

### Community Services Officer

Communities around the country have been utilizing Community Service Officer (CSO) programs for decades. These programs have grown in popularity in recent years with the community's expressed desire for alternatives to traditional police response and have become an industry best practice. In addition, increasing budgetary constraints have forced government and law enforcement leaders to develop programs that enhance their organizations relationship with the community. CSO's help in this goal by responding to calls and providing service that may have previously been handled by a sworn police officer.

SPD employs one CSO. The CSO is a non-sworn position with limited law enforcement authority. The CSO's job duties include parking enforcement, animal control, traffic control, minor traffic crash investigations, evidence collection, and assisting police officers at crime scenes. BerryDunn notes that this is a very appropriate use of this resource. CSO's are directly supervised by the chief of police or their designee and may receive direction from senior law enforcement officials.

## 1.5 Crime Rates

Within the policing industry, the UCR categories established by the FBI have been the standard for decades. Under those standards, crimes were separated into two categories: part one crimes (more serious) and part two crimes (all others). The crimes classified as part one crimes under UCR included murder, rape, robbery, aggravated assault, burglary, theft, motor vehicle theft, and arson. In recent years, the FBI has adopted NIBRS, a new standard for crime reporting by police agencies. The NIBRS standard includes several sub-categories and allows for more comprehensive evaluation of certain crime data, particularly on a national scale.

SPD stopped submitting UCR data to the FBI in 2014 and has not submitted NIBRS data. Because this data was not available, UCR and NIBRS data were not analyzed as part of this project. BerryDunn notes that SPD expressed their intent to report NIBRS data to the FBI beginning in 2023 (since drafting this report, BerryDunn has been made aware that SPD is now submitting NIBRS data).

The SPD provided BerryDunn with a CAD dataset that included multiple department responses and activities, including part one and part two crimes, as well as other non-criminal activity. BerryDunn separated the non-criminal data from the dataset and produced Table 1.8. As Table 1.8 reflects, like many other police agencies, the SPD is primarily a service-driven organization, with most of its CFS volume associated with non-criminal activity.

**Table 1.8: Call for Service Totals**

<b>CFS Category</b>	<b>Total</b>
OUT WITH SUSPICIOUS VEHICLE	593
SUBJECT STOP	451
SUSPICIOUS PERSON	208
WELFARE CHECK	203
ALARM AUDIBLE	162
SUSPICIOUS VEHICLE	162
ASSIST PERSON	138
SUSPICIOUS CIRCUMSTANCES	131
COMMUNITY CONTACT	116
PARKING COMPLAINT	93
HAZARD	90
WARRANT SERVICE	86
HIT / RUN NON-INJURY	72
ANIMAL COMPLAINT	69
TRAFFIC COMP	57
PROPERTY LOST/FOUND	51
NOISE COMPLAINT	49
TRAFFIC ACCIDENT UNKNOWN INJURY	49
MOTORIST ASSIST	48
BEHAVIORAL HEALTH	46
CIVIL	46
TRAFFIC DETAIL	45
JUVENILE PROBLEM	41
UNWANTED	41
TRAFFIC ACCIDENT NON-INJURY	40
All Others	310
<b>Service Total</b>	<b>3397</b>
<b>Grand Total (including Criminal)</b>	<b>4295</b>

\*All Others includes CFS <40 events

Source: Agency Provided CAD Data

## 1.4 Contemporary Policing Practices

In 2015, the U.S. Government convened a task force to determine the best and most contemporary industry standards and practices and “*ways of fostering strong, collaborative relationships between local law enforcement and the communities they protect.*”<sup>2</sup> The report produced provided six pillars for 21<sup>st</sup> Century Policing. As part of this project, BerryDunn asked command staff at the SPD to complete a 21<sup>st</sup> Century Policing survey, which provides a mechanism for assessing the operational alignment of the agency against the six primary pillars the task force identified. The survey BerryDunn provided consisted of 60 questions, separated within the six pillar areas. For each question, command staff were asked to independently assess whether the department regularly engages in practices that are consistent with the task force recommendation area or whether the department inconsistently does so or not at all. The results from the survey are provided in Table 1.9

**Table 1.9: 21<sup>st</sup> Century Policing**

Area	Max. Possible	Average Score	Pct. of Max.
Building Trust and Legitimacy	18	14.67	81.48%
Policy and Oversight	30	11.67	38.89%
Technology and Social Media	10	7.33	73.33%
Community Policing and Crime Reduction	36	18.00	50.00%
Training and Education	18	13.67	75.93%
Officer Wellness and Safety	12	10.00	83.33%
<b>Totals</b>	<b>124</b>	<b>75.33</b>	<b>60.75%</b>

Source: 21<sup>st</sup> Century Policing Survey

Within the context of this survey, it is important to understand that not all the task force recommendations apply equally to each agency. Further, the surveys for this study were completed independently by command staff based on their interpretation of the task force recommendation and their subjective assessment of the operational aspects of the agency in relation to each topical area (which for some, may be limited). Lastly, there is no specific standard or expected score for any of the pillar areas or the overall rating. Instead, BerryDunn provides this survey as one mechanism for examining and assessing various aspects of the agency, with the intent of encouraging additional discussion and consideration in any areas in which command staff scored the agency low. Accordingly, BerryDunn suggests that the SPD engage a conversation about the 21<sup>st</sup> Century Policing report, recommendations, and the

<sup>2</sup> Final Report of The President’s Task Force on 21<sup>st</sup> Century Policing – [http://www.cops.usdoj.gov/pdf/taskforce/taskforce\\_finalreport.pdf](http://www.cops.usdoj.gov/pdf/taskforce/taskforce_finalreport.pdf)

assessment above to determine any appropriate actions to engage efforts that correspond to any of those areas.

## 1.5 Workforce Survey

Workforce perceptions, attitudes, and expectations constitute essential information for understanding the current culture and effectiveness of any organization. This information assists in diagnosing opportunities for constructive change and managing organizational transformation. BerryDunn surveyed the SPD workforce to capture such information and to broaden staff involvement in the study.

### Survey Structure

The electronic survey offered to all staff consisted of a respondent profile (current assignment), 51 content items (opinion/perception), seven organizational climate items, and an open comments option that solicited feedback on what the department does well, what is in need of improvement, and any other comments the respondent wished to provide. The content items section elicited employee responses in ten different dimensions. Each of the dimension sections of the survey consisted of five or six forced-choice questions. At the request of BerryDunn, the SPD distributed the survey electronically via a link provided through the SPD email system, to every member of the agency, sworn and non-sworn, and the chief of police promoted participation. Survey protocols promoted anonymity of the respondents.

### Survey Response

BerryDunn received 11 responses to the survey, out of 21 possible, representing a 52.38% return rate (assuming all positions were staffed, which BerryDunn is aware was not the case). The return rates are statistically significant and indicative of the desire of staff to engage in the process of self-analysis and improvement. Table 1.10 below provides a breakdown of the survey respondents and their rank and unit within SPD.

**Table 1.10: Respondent Profile**

Unit Assignment	Total
Executive and Command Staff, Sworn	3
Non-Sworn Supervisor or Manager	1
Other Non-Sworn Personnel	2
Patrol – Sworn Officer	4
Investigations Division – Sworn	0
Specialty Division or Assignment – Sworn	1

Source: Organizational Climate Survey



## Survey Analysis – Content Section

Survey results are most useful to isolate conditions and practices that need attention and/or those that offer an opportunity to advance the effectiveness of operations, achievement of outcomes, and the overall health of the workplace. For each content survey dimension, respondents chose between the following responses: never, occasionally, usually, frequently, or always. BerryDunn assigned numeric values of 1 – 5 (with 1 being low or never, and 5 being high or always) respectively. In some cases, if the question did not apply, respondents could also choose an N/A response. For each of the ten dimensions, BerryDunn calculated the weighted average of the responses. Table 1.11 provides these data.

**Table 1.11: Survey Response Categories**

Survey Category	Average	Study Comparisons	
		Range	Average
Leadership	3.80	2.54 – 3.76	3.01
Communication	3.36	2.40 – 3.66	2.86
Accountability and Fairness	3.22	2.49 – 3.85	2.98
Job Satisfaction	3.80	2.81 – 4.10	3.31
Training	3.39	2.24 – 3.77	3.07
Equipment and Technology	3.06	1.95 – 3.95	3.03
Patrol Staffing and Deployment	2.81	1.78 – 2.69	2.22
Investigations Staffing and Assignments	3.10	1.43 – 2.67	2.04
Community Policing/Engagement	4.21	2.76 – 3.82	3.30

Source: Organizational Climate Survey

The scores for the dimensions in Table 1.11 represent the weighted aggregate score from the respondents from multiple questions within the survey. In none of the dimensions, was the average response below 2.5 (assessed as a pivotal threshold for responses). It is noteworthy that eight of the nine categories from the survey registered an aggregate score over 3.0. The one category that fell below 3.0 relates to patrol staffing and deployment, an area of stated concern. These response numbers are comparatively high in relation to prior studies.

## Organizational Climate

The second portion of the survey involved an analysis of the organizational climate using specific survey questions that directly target certain operational areas. By their construction, these questions provide a different vantage point from typical quantitative questions, and a readily observable range, both in reference to how the organization currently functions and how it should ideally function based on the opinions of the respondents. These questions engage a 10-point scale, with 1 being low and 10 being high. BerryDunn has provided the response data in Table 1.12.

**Table 1.12: Organizational Climate Assessment**

<b>CONFORMITY:</b> The feeling that there are many externally imposed constraints in the organization; the degree to which members feel that there are rules, procedures, policies, and practices to which they have to conform, rather than being able to do their work as they see it.		
Conformity is very characteristic of the organization	<b>Current</b>	<b>7.45</b>
Conformity should be a characteristic of the organization	<b>Desired</b>	<b>6.09</b>
<b>RESPONSIBILITY:</b> Members of the organization are given personal responsibility to achieve their part of the organization's goals; the degree to which members feel that they can make decisions and solve problems without checking with supervisors each step of the way.		
There is great emphasis on personal responsibility in the organization	<b>Current</b>	<b>8.09</b>
There should be great emphasis on personal responsibility in the organization	<b>Desired</b>	<b>9.27</b>
<b>STANDARDS:</b> The emphasis the organization places on quality performance and outstanding production; the degree to which members feel the organization is setting challenging goals for itself and communicating those goals to its members.		
High challenging standards are set in the organization	<b>Current</b>	<b>6.91</b>
High challenging standards should be set/expected in the organization	<b>Desired</b>	<b>9.00</b>
<b>REWARDS:</b> The degree to which members feel that they are being recognized and rewarded for good work rather than being ignored, criticized, or punished when things go wrong.		
Members are recognized and rewarded positively within the organization	<b>Current</b>	<b>6.45</b>
Members should be recognized and rewarded positively within the organization	<b>Desired</b>	<b>9.36</b>
<b>ORGANIZATIONAL CLARITY:</b> The feeling among members that things are well organized, and goals are clearly defined rather than being disorderly or confused.		
The organization is well organized with clearly defined goals	<b>Current</b>	<b>6.73</b>
The organization should be well organized and have clearly defined goals	<b>Desired</b>	<b>9.27</b>
<b>WARMTH AND SUPPORT:</b> The feeling of friendliness is a valued norm in the organization; that members trust one another and offer support to one another. The feeling that good relationships prevail in the work environment.		
Warmth and support are very characteristic of the organization	<b>Current</b>	<b>8.18</b>
Warmth and support should be very characteristic of the organization	<b>Desired</b>	<b>9.27</b>
<b>LEADERSHIP:</b> The willingness of organization members to accept leadership and direction from other qualified personnel. As needs for leadership arise, members feel free to take leadership roles and are rewarded for successful leadership. Leadership is based on expertise. The organization is not dominated by, or dependent on, one or two people.		
Members accept and are rewarded for leadership based on expertise	<b>Current</b>	<b>6.64</b>
Members should accept and be rewarded for leadership based on expertise	<b>Desired</b>	<b>9.00</b>

Source: Organizational Climate Survey

Because there is no correct or incorrect response, BerryDunn will not provide an analysis here with regard to any specific question or category of the information in Table 1.12. Instead, the department is encouraged to examine the responses below, and to consider what adjustments, if any, might be appropriate to respond to the desired level noted by staff who took the survey.

In that analysis, BerryDunn recommends the SPD look closely at the difference between the current rating and the desired rating. A larger delta (or variance) indicates a more significant area of concern and/or need for deeper exploration.

There are three important aspects of the organizational climate survey from Table 1.12 that make this a versatile tool.

1. There is no *correct* or *right* response. The responses reflect the collective desires of the staff at the SPD, and as such, they are representative of the current and desired culture of the SPD, as opposed to an arbitrary standard that is set elsewhere.
2. This tool has tremendous utility. The categories in this questionnaire are clear, and the agency can easily identify, based on the responses, which areas require focused attention.
3. This tool is brief and easily replicable. The agency can re-administer this survey at various intervals and the results can help the agency recognize whether its efforts are shifting in one or more of these cultural areas and whether they are successful.

## Survey Analysis – Qualitative Responses

Within the climate survey, staff were afforded the opportunity to provide open-ended feedback regarding what the department does well, what is in need of improvement, and any other comments they wanted to provide.

Unlike quantitative analysis—which can be easily broken down into numeric representations, ratios, or percentages—qualitative data can be much more difficult to present. The process of evaluating and reporting qualitative data involves looking for similarities in the data and grouping them into a manageable number (usually four to six) of overarching *themes*. Data within these themed areas may be positive, negative, neither, or both—including comments that merely make suggestions. The analysis provided here engages a contemplative process of considering each of the data elements (narrative responses) to determine within which themed area it may be most appropriately categorized, and then to consider the substance of each response in relation to the theme area and the other data within that category. Topics within each theme can certainly impact topics in other themes, and those connections, when significant, have been highlighted in this analysis.

## Qualitative Response Analysis

BerryDunn received 24 separate and distinct narrative responses from this survey (in response to one or more questions). The responses included positive feedback, critical observations, and comments regarding opportunities for improvement. Not unexpectedly, responses and feedback were mixed or even conflicting. Respondents provided several specific examples of what is

being done well, along with specific recommendations about how areas could be improved, and many responses were detailed. The response rate and the detailed level of responses suggests a climate in which employees are aware of the challenges facing SPD and are invested in making improvements.

Notably, of the 24 responses, BerryDunn observed that 13 described areas in need of improvement while 11 provided positive feedback concerning the department and its leadership. BerryDunn notes that negative comments generally out way positive ones and often by a significant number. This did not happen for SPD as the numbers of positive and negative comments are nearly equal. Despite some growth opportunity comments from staff, BerryDunn observed that the responses appeared honest, specific, and useful, and they embodied a solution-based perspective, as opposed to simply an expression of complaints.

BerryDunn conducted a thorough qualitative review of the survey responses and has summarized the responses into several primary themes, which are provided below.

### Community Engagement

Survey respondents were very complimentary of the way SPD officers and staff interact and engage with the community. It is clear SPD takes great pride in providing the Sandy community with a high level of service and that engaging with the community is of the highest priority for SPD staff.

### Staffing

The need to increase department sworn staffing levels was a frequent response. Survey respondents feel that low authorized staffing levels and attrition inhibit their ability to participate in quality training opportunities and engage in officer wellness activities. Respondents also believe that the lack of staffing has a negative impact on their ability to participate in pro-active policing practices and to be present at community events and to be interact with the community overall.

### SPD Culture

Respondents describe a very positive culture within the SPD. Many describe this as a recent change and credit this to the retirement of the previous chief and the promotion of the lieutenant to interim chief. Respondents describe the culture as feeling like a family where everyone looks out for and takes care of one another. This feeling of camaraderie is important in any organization and helps to improve the service provided to the community. SPD should be proud of the culture they have created.

### External Support

Survey respondents describe feeling supported by the Sandy community and SPD leadership and expressed their appreciation of that relationship.

SPD staff did express concerns over a lack of support from City leadership outside of the SPD to include the City Manager, Mayor, and members of the City Council. Respondents expressed

a feeling that although city leadership expresses appreciation and support verbally it is not reflected in staffing allocations, pay or benefits. This is an important factor because even though city leadership may express their support and appreciation of SPD staff verbally, the perception that they are not truly being supported in practice can negatively impact SPD morale and ultimately service provided to the community. Given the positive relationship SPD has with the community this does is not currently an issue but is a subject to be noted.

## Conclusion

The level of sincerity, detail, and sophistication included in the survey responses indicate an organization whose members care deeply about the organization and its success. Similarly, the inclusion of observations about positive aspects of the department reveals honesty and frankness about participation in the survey. This survey produced meaningful information that helps illuminate several themes that affect department performance, including both positive attributes, areas for improvement, and areas that combine some aspects of both. Respondents also provided specific observations and suggestions that can contribute to a meaningful overall agency assessment and assist in the production of effective recommendations for performance enhancement.

## Summary

The City of Sandy is in northwestern Oregon, approximately 27 miles east of Portland. The City is about 3.1 square miles in size and has a population of approximately 12,612, according to the 2020 census.

For 2023, the SPD has authorization for 16 sworn positions and four non-sworn positions, for a total of 21 authorized positions. In pursuing its public safety mission, the SPD allocates personnel to various positions and roles. There is one detective assigned as an investigator. The SPD also has two SRO's who are supervised by a patrol sergeant. There are 12 officers assigned to patrol. Within this total, eight officers are assigned the primary responsibility of responding to CFS. There are four sergeants also assigned to patrol, who answer CFS as needed. In addition, these sergeants have supervisory and administrative duties. The chief is currently the sole sworn administrative staff member (as noted previously in this report the lieutenant position is currently vacant). Three non-sworn employees round out the remaining positions.


Of the four non-sworn personnel for the SPD, three are part of the Records Division. This includes records division manager. Based on a review of assignments, and in discussions with records personnel, the Records Division is appropriately staffed and is managing work demands. The other non-sworn staff member is a Community Services Officer (CSO/code enforcement officer.)


Command staff from the SPD completed a questionnaire on contemporary policing practices, as outlined in the 21<sup>st</sup> Century Policing Task Force Report. Based on the responses from the command staff, there is an opportunity for the SPD to explore additional efforts toward incorporating 21<sup>st</sup> Century policing standards into its operational practices.

## Recommendations

This section provides two formal recommendations from this section. The recommendation table below includes the section and subsection, recommendation number, and priority as assessed by BerryDunn, and details concerning the findings and recommendations.

**Table 1.13: Section 1 Recommendations**

The Policing Environment		
No.	21 <sup>st</sup> Century Policing	Overall Priority
<i>Section I, Subsection VI: Contemporary Policing Practices</i>		
1-1	<b>Finding Area:</b> Although the SPD strives to exemplify the characteristics outlined in the 21 <sup>st</sup> Century Policing Task Force Report, there are several sections within the six main topic areas or “pillars” that may benefit from focused attention from the SPD.	
	<b>Recommendation:</b> The SPD should affirm its commitment to 21 <sup>st</sup> Century Policing and develop a process for pursuing, maintaining, and monitoring the department’s actions in pursuit of that goal.	

The Policing Environment		
No.	NIBRS Reporting	Overall Priority
<i>Section I, Subsection VI: Contemporary Policing Practices</i>		
1-2	<b>Finding Area:</b> SPD stopped reporting UCR data to the FBI in 2014 and has not reported NIBRS data.	
	<b>Recommendation:</b> NIBRS is an important tool for tracking crime trends nationally and on a regional and local level. SPD should commit to submitting NIBRS data to the FBI. BerryDunn notes that this is a stated goal of SPD’s, and reportedly, SPD has submitted its 2023 NIBRS data, and is continuing to do so in 2024	

## 2.0 Patrol Services

*This section includes an analysis of patrol staffing, patrol work schedule and personnel deployments, and response to calls for service.*

The purpose of the Patrol Division is to identify and hold criminals accountable, reduce crime, reduce the fear of crime, and to use proactive problem-solving methods in conjunction with the community members of Sandy. This is accomplished through active patrol, traffic enforcement, DUI enforcement, criminal investigations, evidence/crime scene processing, and drug enforcement. The Patrol Division responds to emergency and nonemergency CFS. When not responding to these calls, officers in this section use non-obligated time to actively patrol the City. This section of the report provides substantive details concerning the structure of the Patrol Division, along with data and analysis regarding workloads and personnel deployments.

### 2.1 Patrol Personnel and Deployment

The authorized staffing levels for the Patrol Division are provided in Table 2.1. BerryDunn notes that the workload and staffing model for patrol relies upon calculating the actual time available for those officers who routinely respond to CFS. For the SPD, only patrol officers are assigned primary CFS response. Sergeants will step in at times of increased call volume however their time is largely split between administrative functions and supervision. This translates into eight officers who are assigned to primary CFS response.

**Table 2.1: Authorized Police Sworn Staffing – Police Operations Bureau**

Section	Total Number
Patrol Sergeants	4
Patrol Officers	8
Other Units Assigned to Patrol	
<b>*Totals</b>	<b>12</b>

\*Includes Vacancies

Source: Agency Provided Data

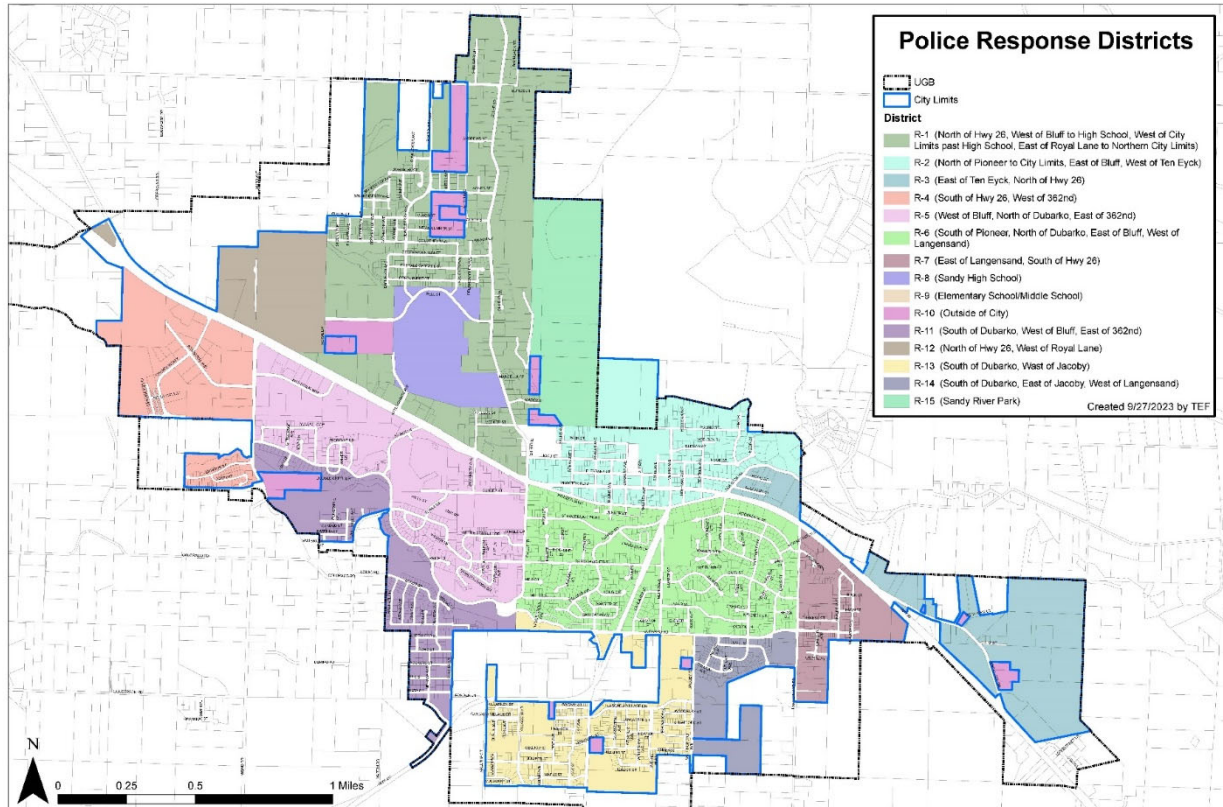
Staffing levels within police departments are frequently in flux, as are position assignments and unit allocations. BerryDunn recognizes that some of the numbers in Table 2.1 reflect *authorized* staffing levels and not *actual* staffing levels, so actual staffing numbers might be slightly out of alignment with respect to the current conditions within the report. The workload calculations BerryDunn uses in this report rely on full staffing of the allocated positions. If one or more positions were vacant, these workload obligation calculations would increase in ratio to the number of vacant positions. Staffing needs are discussed later in this section, but it is BerryDunn’s assessment that the Patrol Division for the SPD is not adequately staffed.

The geography of the City can be an important factor in understanding staffing demands and personnel allocations. The land area of Sandy is roughly 3.1 square miles. The SPD has



separated the city into 15 designated police response districts, however patrol officers are not assigned to a specific patrol district. See Figure 2.1 below.

**Figure 2.1: Sandy PD Response District Map**



Source: Agency Provided Data

The City is relatively small with a geographical area of just 3.1 Square miles. There are no geographic obstacles within the City that negatively impact patrol coverage. The Clackamas County Jail (CCJ) is the only available holding facility when an SPD officer makes an arrest. BerryDunn notes that the CCJ is 23.3 miles and approximately 35 minutes from the City. With only one officer coverage the City could be left without police coverage for more than an hour and a half when travel and arrest processing time is accounted for. This is not optimal as it will increase response times for routine CFS and require mutual aid for emergency CFS.

## 2.2 Patrol Call Load and Distribution of Calls for Service

BerryDunn examines workload data in several places throughout this report, most notably those that relate to patrol/field staffing requirements and follow-up investigations demand. BerryDunn uses CFS as a primary means to calculate obligated workload within the Patrol Division. CFS data are also critical in analyzing timeliness of police response, geographic demands for service, and scheduling and personnel allocations. For analysis purposes, BerryDunn provides numerous tables and figures that outline various aspects related to CFS. Table 2.2 shows a list of allocated work captured by CAD for calendar year 2022.



**Table 2.2: Patrol and Supplemental Patrol Unit Hours**

Patrol	Community	Officer	Unknown	Total
Sandy Patrol	2445:43:59	2446:43:59	2447:43:59	2448:43:59
<b>Subtotal</b>	<b>2445:43:59</b>	<b>2446:43:59</b>	<b>2447:43:59</b>	<b>2448:43:59</b>
Supplemental Patrol	Community	Officer	Unknown	Total
Chief of Police	9:39:51	6:45:52	0:34:02	16:59:45
Sandy Lieutenant	87:59:20	26:37:22	0:05:47	114:42:29
Sandy Detective	28:46:50	48:28:11	0:16:47	77:31:48
Sandy Sergeant	264:34:08	113:36:42	0:46:35	378:57:25
School Resource Officer	207:41:11	177:42:04	0:46:52	386:10:07
Specialty Unit (SRO, Training, etc.)	34:04:48	26:55:36	5:24:03	66:24:27
Reserve Patrol Officer	8:01:43	35:51:00		43:52:43
Reserve Patrol Sergeant	1:04:34	2:42:15		3:46:49
<b>Subtotal</b>	<b>641:52:25</b>	<b>438:39:02</b>	<b>7:54:06</b>	<b>1088:25:33</b>
Non-Patrol	Community	Officer	Unknown	Total
Records Manager	3:37:06			3:37:06
Records Specialist	15:44:03	0:20:49		16:04:52
Code Enforcement (non-sworn)	220:34:24	61:36:57	1:41:44	283:53:05
<b>Subtotal</b>	<b>239:55:33</b>	<b>61:57:46</b>	<b>1:41:44</b>	<b>303:35:03</b>
<b>Sandy PD Total</b>	<b>3327:31:57</b>	<b>2947:20:47</b>	<b>2457:19:49</b>	<b>3840:44:35</b>

Other Police Departments	Community	Officer	Unknown	Grand Total
Broadcasted County Area	0:25:57			0:25:57
Broadcasted Sandy Area	83:37:04	10:07:54	15:30:13	109:15:11
Canby PD	0:05:22	0:42:59		0:48:21
Clackamas County Sheriff's Office (CCSO)	301:23:52	177:03:20	0:56:44	479:23:56
CCSO Parole and Probation		27:00:26		27:00:26
Clackamas County Medical Examiner	15:01:13			15:01:13
CCSO		0:05:32		0:05:32
Estacada PD (Contract CCSO city)	0:33:56	5:38:13		6:12:09
Gladstone PD	1:08:37	1:48:34		2:57:11
Happy Valley PD (Contract CCSO city)	5:56:42	2:55:00		8:51:42

Other Police Departments	Community	Officer	Unknown	Grand Total
Lake Oswego Communications	155:47:48	34:03:16		189:51:04
Lake Oswego PD	0:00:04			0:00:04
Milwaukie PD	14:53:19			14:53:19
Molalla PD	14:06:16	2:45:37		16:51:53
Oregon City PD	1:48:33	5:23:35		7:12:08
Oregon Department of Transportation	0:10:00			0:10:00
Oregon State Police	21:26:14	2:54:19	0:25:37	24:46:10
Other Agency	1:01:11			1:01:11
Portland Area Dispatch	0:15:56			0:15:56
Portland General Electric	2:23:47			2:23:47
Portland Police Bureau	0:42:22	0:00:03		0:42:25
Tow Desk 1	0:44:53	0:25:27		1:10:20
Tow Desk 2	0:15:14			0:15:14
United States Marshal's Service	3:04:33	0:41:29		3:46:02
Unknown Agency	0:00:00	0:00:00	0:00:00	0:00:00
Wilsonville PD (Contract CCSO city)		0:00:06		0:00:06
<b>Subtotal</b>	<b>624:52:53</b>	<b>271:35:50</b>	<b>16:52:34</b>	<b>913:21:17</b>
Information Only	Community	Officer	Unknown	Total
Info Call	0:51:24	0:37:49	8:12:56	9:42:09
Information C District	0:08:17			0:08:17
Information D District		0:00:29		0:00:29
Information Molalla District	0:02:47			0:02:47
Information Oregon City District	0:15:33			0:15:33
Information Sandy District	444:14:46	44:02:38	70:46:43	559:04:07
<b>Subtotal</b>	<b>445:32:47</b>	<b>44:40:56</b>	<b>78:59:39</b>	<b>569:13:22</b>
<b>Grand Total</b>	<b>4397:57:37</b>	<b>3263:37:33</b>	<b>2553:12:02</b>	<b>5323:19:14</b>

Source: Agency Provided Data

There are a few important aspects of Table 2.2 to point out. First, BerryDunn has separated the workload provided in this table into categories that indicate patrol, supplemental patrol, and non-patrol, and it is important to understand the distinction between the different categories shown. Patrol refers to those officers who routinely are responsible for handling CFS. Supplemental patrol refers to those officers who support the patrol function and who might occasionally answer CFS, but for whom CFS response is not a primary responsibility. Non-patrol relates to

workload volume captured by CAD for non-sworn employees for the SPD, but which is not CFS related, in this case, code enforcement.

The second point to understand is that the totals in Table 2.2 include both community- and officer-initiated activity. This is noteworthy because the BerryDunn workload model categorically separates these CFS and relies on obligated workload that emanates primarily from community-initiated calls. Community-initiated work effort by patrol represents approximately 2,445 hours of the obligated workload shown in Table 2.2. Although other units support the patrol officers and engage in a certain amount of community-initiated CFS it is evident that patrol officers are responsible for the bulk of the obligated time associated with community-initiated CFS.

BerryDunn identified non-CFS response and self-initiated data from the dataset. After processing the CAD data, the data reflected 2,445 hours of community-initiated patrol CFS workload. After making these reductions, certain hours (self-initiated criminal activity, supplanting) were added back into the totals, as these hours represented part of the obligated workload. Generally, data within the *supplemental patrol* and *non-patrol* categories are not considered part of the workload for patrol. Units in this area typically include CSOs, Animal Control, task force units, light duty officers, and special traffic units. However, on examination, a significant amount of the data in these categories is likely the result of *supplanting*. In this context, supplanting refers to officers or supervisors who act as primary CFS officers even though this is not part of their general work duties. When this occurs, it reduces the workload burden for patrol, artificially reducing their obligated workload total.

BerryDunn knows supplanting is occurring at the SPD based on conversations with staff and a review of the CAD data. Several individuals interviewed said there are times when staffing in patrol is low, and employees from other units have had to assist by taking CFS. BerryDunn notes that this is commonplace in law enforcement agencies; however, when this occurs, it makes calculating the obligated workload for patrol more difficult. For the SPD, the amount of estimated supplanting is substantial, accounting for 17.62% of the obligated workload volume. This is likely due, at least in part, to staffing vacancies.

As part of this assessment, BerryDunn asked the SPD patrol officers to complete a worksheet and survey related to CFS they handled during two of their work shifts (BerryDunn did not identify which shifts to record). Table 2.3 provides one section of data from that survey.

**Table 2.3: Officer Workload Survey – Reports**

	Sandy	*Prior Studies
Number of Responses	2	111
Number of Written Reports	9	255
Average Reports per Shift	4.50	2
Average Minutes per Report	10	35

\*Table includes data from prior studies conducted by the IACP.

Source: Data from Patrol Workforce Survey

Based on the self-reported survey provided, patrol officers reported an average of 4.50 narrative reports per shift, with the average duration of approximately 10 minutes. Note that the time per report is in addition to the on-scene time for each CFS. This self-reported data is a deviation from prior studies as the time to complete a incident report for SPD is less than a third of the time reported in previous studies. This can be attributed to any number of factors such as, complexity of the report, experience level of the officer, or the quality of the RMS. For SPD it is unclear why the self-reported time for report writing is so much lower than prior studies and would require additional data collection and analysis.

Within the same survey referenced for Table 2.3, officers reported data related to their workload and type of activity. The results, shown in Table 2.4, indicate that in total, officers handled 23 CFS, with an average of 11.50 CFS per shift, each averaging 23.17 minutes. This self-reported data does not include report writing time, but only the on-scene time associated with handling the CFS, including backup responses. BerryDunn notes that this is self-reported data, and the collection period was limited.

Within the same survey, officers self-reported data related to their workload and type of activity. The data reported from the 2 responses indicate that, in total, officers handled 399 CFS, with an average of 7.82 CFS per shift and each CFS averaging 29.33 minutes, see Table 2.30. This self-reported data does not include report-writing time but only the on-scene time associated with handling the CFS, including backup responses. BerryDunn notes that, based on several prior studies, the average self-reported number of CFS handled per shift was nine, with an average CFS duration of 40 minutes. The amount of time per CFS for the SPD is significantly lower than in the prior study averages, although the number of CFS per shift at the SPD is very similar to prior study averages. This means that SPD is spending less time overall on response to CFS than the prior studies with 266 minutes total (11.50 CFS times 23.17 minutes per call) at SPD versus 360 minutes total (9.0 CFS times 40 minutes per call) for departments in the prior studies average. As with Table 2.29, the above data is self-reported, and it may not be completely accurate.

**Table 2.4: Officer Workload Survey – Calls for Service**

	Sandy	*Prior Studies Avg.
Number of Responses	2	114
Number of CFS Reported	23	910
Average CFS Responses per Shift	11.50	9
Average Minutes per CFS	23.17	40

\*Table includes data from prior studies conducted by the IACP.  
Source: Data from Patrol Workforce Survey

BerryDunn notes that based on several prior studies, the average self-reported number of CFS handled per shift was nine, with an average CFS duration of 40 minutes. The amount of time per CFS for the SPD is lower than the prior study averages. This is common in smaller departments, because the availability of backup is lower, and cumulative on-scene totals are

reduced when the number of backup units is also reduced. The data totals in this table also suggest an efficient approach to each CFS from a time-use perspective.

## Methodology

The BerryDunn project team obtained a comprehensive CAD dataset from the SPD for the calendar year 2022. The dataset contained nearly 16,000 entries. The CAD data related to 11,677 incidents, reflecting nearly 5,323 hours of work effort. This total number of hours reflected the actual workload hours recorded within CAD, but there were three primary issues inflating these numbers, specifically as they related to obligated patrol workload. First, numerous data did not appear to represent primary response to CFS within patrol. These data belonged to various units with the department, including code enforcement, for example. As part of the analysis process, BerryDunn separated and removed these data.

The second issue involved officer-initiated, as opposed to community-initiated, activity. As noted above, the BerryDunn workload model relies upon a separation of these activities, and accordingly, it was necessary to split these data as part of the analysis. The total number of obligated community-initiated workload hours in the patrol category was approximately 2,445. The number of officer-initiated workload hours for patrol was approximately 705. Again, these data were split apart from the obligated workload total for patrol.

The third issue relates to the data within CAD that is not part of the obligated workload for the patrol officers. These data include both community- and officer-initiated data, which is reflected in Table 2.2 in the supplemental patrol and non-patrol unit categories. As part of the analysis process, BerryDunn separates these data so that only the obligated workload data remains, and this number is used for calculating patrol staffing needs.

As is typical in these types of studies, there were challenges and limitations within the CAD dataset that the SPD provided to BerryDunn. There were empty cells within the dataset, including missing times associated with unit response, and in some cases, response data was inverted, meaning the arrival time preceded the dispatch time. This condition is explainable but required the exclusion of these CFS when calculating unit response times.

Although there were challenges within the dataset, BerryDunn processed the dataset and accounted for these difficulties as part of the overall analysis of the CAD data. In some cases, this meant that some parts of the dataset were excluded from certain calculations. For example, cases of inverted CFS response times were removed so they did not unduly skew response averages. In these instances, the data represented were used to determine averages and percentages of occurrences. So, despite the removal of certain data, it is highly likely that the averages and percentages would be consistent, even if all the data were represented.

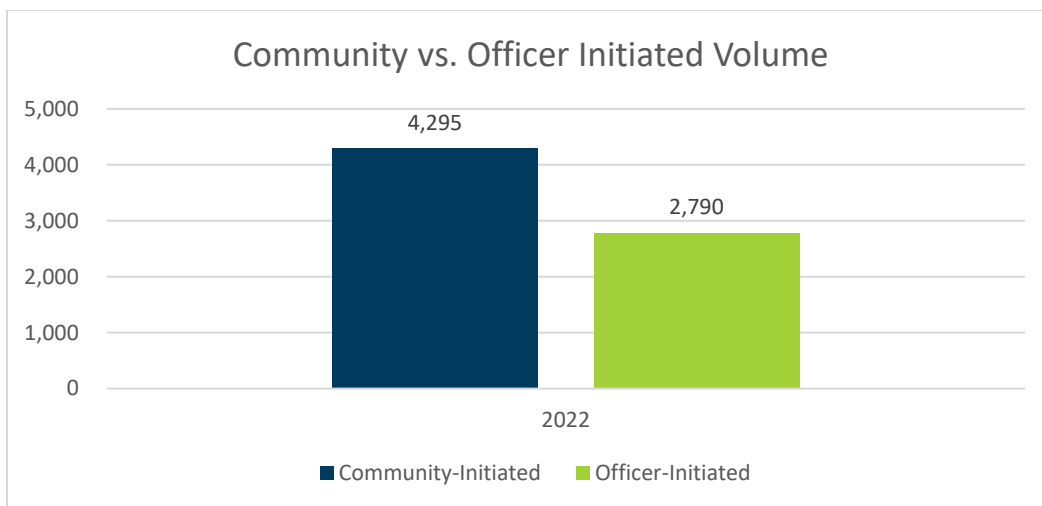
To be clear, BerryDunn is confident that the workload data and calculations presented provide a reasonable representation of the volume of obligated work that the Patrol Division must manage. Additionally, it is common for CAD datasets to contain these types of challenges and variations in the data. BerryDunn also has significant experience in accounting for these variances and in cleaning the CAD database so the data can be used for the required

calculations. BerryDunn exercised this experience and applied a proven methodology to prepare the data for final analysis.

### 2.3 Calls for Service Analysis

In this section, BerryDunn examines the data related to the response to CFS by the SPD, both community- and officer-initiated, and provides a detailed analysis of this information. CFS response represents the core function of policing, and responding to community complaints and concerns is one of the key measures of effective policing in every community. Leaders can also use data related to CFS to measure the confidence and reliance the public has on their police department. In many places around the globe, the public is reluctant to call the police when they have a problem, whether big or small; however, in America, despite the current challenges facing the profession of law enforcement, those in need of help will call the police (generally), regardless of how serious or simple the incident might be. This is a fact that distinguishes American policing from many other countries. Figure 2.2 includes a graphical depiction of community- and officer-initiated activity within the City for 2022, separated by category.

**Figure 2.2: Community- vs. Officer-Initiated CFS**



Source: Agency Provided CAD Data

The data in Figure 2.2 reflects activity only for patrol officers and it excludes activity from all other SPD personnel. The total volume of activity shown in Figure 2.2 is 7,085 incidents. Based on the data in Figure 2.2, 60.63% of patrol officer volume relates to community-initiated activity. Based on data from prior studies, the percentage of community-initiated activity can vary greatly. In seven recent studies, the range of community-initiated volume was from 40.77% to 89.45%. Based on the data from Figure 2.2, the SPD is in the average range of this. There can be various explanations as to why the ratio of community- to officer-initiated activity varies so significantly. For the SPD, this ratio likely related to staffing. Like many police departments across the country, SPD has experienced staffing challenges in recent years. One patrol officer is generally staffed during day shift and two patrol officers are staffed during the overnight shift. This has created an environment where officers are reluctant to engage in proactive policing

strategies such as traffic enforcement or building checks for fear of becoming engaged in an incident that keeps them from answering community generated CFS.

In Table 2.5, BerryDunn examines the percentage of distribution of CFS between crime, service, and traffic-related volume. BerryDunn notes that these data represent Community generated CFS. The percentages include the percentage of total CFS, and the percentage of time spent in each CFS category. Additionally, Table 2.5 provides data on the average cumulative time associated with each CFS in each category.

**Table 2.5: Time per Call for Service – Comparisons**

Sandy PD			
Category	% of Total Calls	% of Call Time	Minutes/CFS
Crime	20.91%	33.39%	58.15
Service	69.66%	59.94%	31.84
Traffic	9.43%	6.67%	24.57

*Prior Study Averages			
Category	% of Total Calls	% of Total Call Time	Minutes per CFS
Crime	38.87%	46.40%	57.02
Service	47.95%	40.19%	40.04
Traffic	13.18%	13.41%	48.61

\*Table includes data from prior studies conducted by the IACP.  
Source: Agency Provided CAD Data

In reviewing Table 2.5, SPD's data is consistent with prior studies in some areas and deviates from prior studies in other areas. SPD's average minutes per CFS for crimes is just over a minute more than the prior studies average for the same category. In contrast to this SPD's average time spent on a traffic CFS is 24.57 minutes. The prior study average is nearly double that of SPD at 48.61 minutes per CFS. Time spent on CFS dealing specifically with crimes is nearly double the self-reported CFS data. This is understandable as CFS involving crimes take significantly longer and involve more resources than a service call. It is also important to note that these data includes responses from all sworn SPD personnel and not just primary CFS takers.

In Table 2.6, an analysis is provided regarding the total number of CFS handled on average by SPD officers based on CFS and staffing totals. In looking at the totals for the benchmark cities, the data suggests that each patrol officer handles an average of 547 CFS per year. When looking at the numbers for the SPD, the average number of CFS per year, per officer is 624. It is important to understand that for Sandy the overnight CFS volume is low. So, even though the average CFS per officer per year is slightly higher, these numbers vary greatly between the different shifts in Sandy. These data also include responses from all sworn SPD personnel and not only primary CFS takers.



**Table 2.6: Call for Service – Comparison Data**

Benchmark City	Population	Total Calls for Service	*First Responders	CFS Per First Responder
<b>Overland Park Study</b>				
Average Totals (29 Cities)	172,795	76,406	140	547
<b>**Prior Study Cities</b>				
<b>Prior Studies – Under 100 Officers</b>	47,256	26,320	44	600
<b>Prior Studies – 100+ Officers</b>	251,839	83,911	171	474
<b>Sandy PD</b>	<b>12,592</b>	<b>4,988</b>	<b>8</b>	<b>624</b>

\*Includes patrol officer allocations, not actual numbers of officers working.

Note: Includes all officers below rank of first-line supervisor, assigned to the following duties: Community-Oriented Policing, Emergency Response, K-9, Patrol, SRO, or Traffic

\*\*Table includes data from prior studies conducted by the IACP.

Source: Agency Provided Data

Table 2.7 below provides the top five types of community-initiated activities handled by the SPD patrol staff, based on time spent and separated by incident type. The data in Table 2.7 uses the same data as Table 2.5, although service CFS and motor vehicle crashes are reflected separately in Table 2.7.

**Table 2.7: Most Frequent Agency Activity by Time Spent and Category**

Community Initiated	Hours on CFS	Pct. of Total
<b>Crime</b>		
DOMESTIC	197:14:50	8.06%
TRESPASS	87:07:00	3.56%
THEFT COLD	62:46:59	2.57%
HARASSMENT/THREAT	47:41:40	1.95%
DISTURBANCE FIGHT	41:47:24	1.71%
<b>Crime – Total Annual Hours</b>	<b>816:41:36</b>	<b>33.39%</b>
<b>Service</b>		
WELFARE CHECK	153:41:53	6.28%
SUBJECT STOP	126:55:20	5.19%
SUSPICIOUS PERS	112:19:06	4.59%
WARRANT SERVICE	92:31:51	3.78%



Community Initiated	Hours on CFS	Pct. of Total
OUT WITH SUSP VEH	77:41:46	3.18%
<b>Service – Total Annual Hours</b>	<b>1254:01:35</b>	<b>51.27%</b>
<b>Traffic (Motor Vehicles Crashes Only)</b>		
TRF ACC UNK INJ	76:23:18	3.12%
HIT / RUN NON-INJ	48:21:59	1.98%
TRF ACC NON-INJURY	48:05:53	1.97%
TRF ACC INJURY	22:32:11	0.92%
HIT / RUN INJURY	7:59:11	0.33%
<b>Traffic Subtotal – Total Annual Hours (M/V Crashes Only)</b>	<b>211:54:18</b>	<b>8.66%</b>
<b>Traffic (No M/V Crashes)</b>		
SUSPICIOUS VEH	83:05:55	3.40%
PARKING COMPLAINT	32:59:26	1.35%
TRAFFIC COMP	24:46:49	1.01%
TRAFFIC DETAIL	14:13:52	0.58%
MOTORIST ASSIST	8:00:28	0.33%
<b>Traffic Subtotal – Total Annual Hours (No M/V Crashes)</b>	<b>163:06:30</b>	<b>6.67%</b>
<b>Traffic – Total Annual Hours</b>	<b>375:00:48</b>	<b>15.33%</b>
<b>*Community Initiated Total Hours</b>	<b>2445:43:59</b>	<b>100.00%</b>

Source: Agency Provided CAD Data

Table 2.8 provides the 25 most frequent activities based on volume of incidents. As the data in 2.8 shows, service-related volume dominates the SPD's workload, with seven of the most frequent top ten CFS types being service related.

**Table 2.8: Most Frequent Activity by Volume**

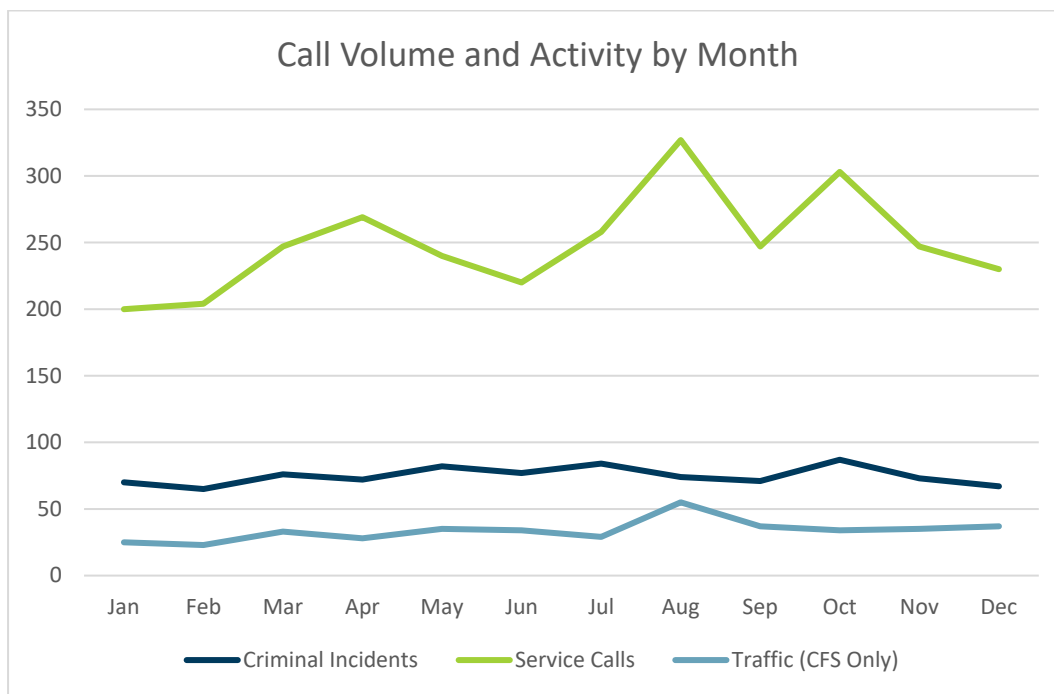
2022 Sandy PD CAD Event	Event Type	Count	Percent
OUT WITH SUSP VEH	Service	593	13.81%
SUBJECT STOP	Service	451	10.50%
SUSPICIOUS PERS	Service	208	4.84%
WELFARE CHECK	Service	203	4.73%
ALARM AUDIBLE	Service	162	3.77%
SUSPICIOUS VEH	Traffic	162	3.77%
DOMESTIC	Criminal	151	3.52%
ASSIST PERSON	Service	138	3.21%
SUSPICIOUS CIRC	Service	131	3.05%
TRESPASS	Criminal	118	2.75%
COMMUNITY CONTACT	Service	116	2.70%
THEFT COLD	Criminal	99	2.31%
PARKING COMPLAINT	Traffic	93	2.17%
HARASSMENT/THREAT	Criminal	90	2.10%
HAZARD	Service	90	2.10%
WARRANT SERVICE	Service	86	2.00%
HIT / RUN NON-INJ	Motor Vehicle	72	1.68%
ANIMAL COMPLAINT	Service	69	1.61%
CRIM MISCHIEF	Criminal	61	1.42%
TRAFFIC COMP	Traffic	57	1.33%
PROPERTY LST/FND	Service	51	1.19%
NOISE COMPLAINT	Service	49	1.14%
TRF ACC UNK INJ	Motor Vehicle	49	1.14%
MOTORIST ASSIST	Traffic	48	1.12%
BEHAVIORAL HEALTH	Service	46	1.07%
CIVIL	Service	46	1.07%
TRAFFIC DETAIL	Traffic	45	1.05%
DISTURBANCE FIGHT	Criminal	44	1.02%
<b>Grand Total</b>		4295	100.00%

\*Top events by frequency with a minimum of 1% of the overall volume.

Source: Agency Provided CAD Data

To analyze the cyclical patterns of obligated work volumes, BerryDunn also split CFS data by month, and Figure 2.3 below reflects this data. As expected, CFS activity is generally higher through the summer months, when more people are out enjoying the resources of the City and the surrounding area. The cyclical pattern of CFS during the time of year is an important consideration, similar to examining CFS patterns by day of the week and hour of the day. When CFS volumes and patterns vary significantly, it can be helpful to modify personnel deployments to account for those variations. Although Figure 2.3 shows a shift in CFS volumes across the months, with February being the low point and August reflecting the high point, these variations average about five CFS per day and are not substantive enough to warrant varied scheduling to accommodate them.

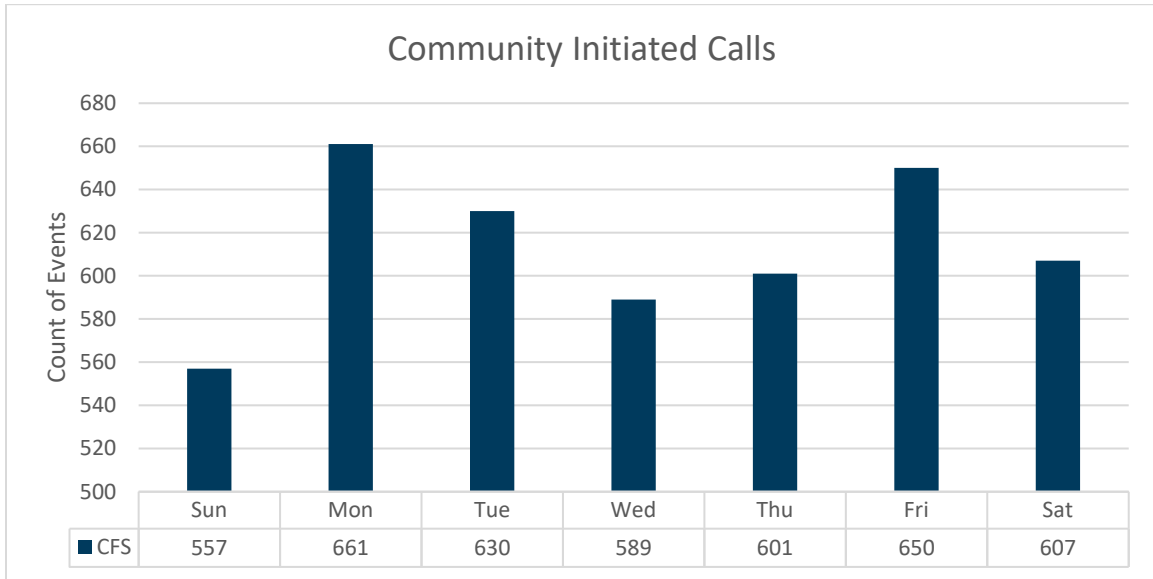
**Figure 2.3: Call Volume by Month and Type**



Source: Agency Provided CAD Data

Figure 2.4 shows community-initiated call volume by day of the week. As shown, Monday, Tuesday, and Friday consistently see the highest volume of CFS. The variation is not significant enough to warrant a reallocation of resources.

Figure 2.4: Call Volume by Day



Day	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total
Percent	13%	15%	15%	14%	14%	15%	14%	100%

Source: Agency Provided CAD Data

In addition to looking at the distribution of CFS, BerryDunn also examined response times to CFS by the SPD. Table 2.9 provides the breakdown of CFS by priority, as assigned by the CAD system and dispatchers. There are seven priority codes (1 – 7), with one as the highest priority and seven as the lowest. Six priority codes are reflected in Table 2.9; there were no priority six calls in the data analyzed. Although there are six priority codes reflected in Table 2.9, nearly all the CFS for the SPD fall into categories 2 – 5.

Table 2.9: Response Times by Dispatch Priority

Incident Priority*	All Events		
	Count of Incidents	Total Hours Disp. To Arrive	Average Time Disp. To Arrive
1	16	1:12:43	4.54
2	575	52:41:24	5.50
3	2299	113:19:14	2.96
4	899	90:29:37	6.04
5	505	43:34:02	5.18
7	1	0:00:00	0.00
<b>Grand Total</b>	<b>4,295</b>	<b>301:17:00</b>	<b>4.21</b>

Source: Agency Provided CAD Data

In Table 2.10, BerryDunn has provided average response times from prior studies of agencies with less than 100 officer and agencies with more than 100 officers. SPD’s Priority 1 response times are lower but in line with national standards and the comparisons provided. The SPD’s Priority 2 response times are lower than overall response averages from the comparisons, as is their total average response time. In fact, SPD’s all priority response time average is less than half of the time presented for departments of less than 100 officers. Notably, the information provided in Tables 2.9 and 2.10 reflect the time from when an officer was dispatched to an incident by emergency communications.

**Table 2.10: Response Time Comparisons**

Comparisons	Priority 1	Priority 2	All Priorities
<b>Prior Studies – Under 100 Officers</b>	0:07:17	0:08:35	0:09:36
<b>Prior Studies – 100 + Officers</b>	0:06:09	0:10:30	0:13:58
<b>Sandy Police Department</b>	<b>0:04:33</b>	<b>0:05:30</b>	<b>0:04:13</b>
<b>Total Average</b>	0:06:30	0:09:54	0:12:36

Source: Agency Provided CAD Data, Prior Study Data

## Cover Cars

Part of the data analysis BerryDunn conducted included looking at the amount of time spent on calls by the primary unit and the cumulative amount of time spent on the call by additional units. This data has been presented in Table 2.11 in two sections. The top portion of the table provides data for primary responding patrol units. The bottom portion of the table provides the data for secondary responding patrol units. It is important to note that Table 2.11 identifies the number of incidents and the number of backup units, but it cannot identify how many backup units responded to each CFS.

Looking only at the response data in Table 2.11, there were 4,295 distinct CFS. Within the total number of CFS, there were 2,520 backup responses. Based on these numbers, 63.02% of the data in CAD related to primary officers, and 36.98% was for backup response. If backup were distributed equally across the CFS, these numbers would indicate that, on average, a backup unit responds to 58.67% of all CFS. As mentioned previously, however, these numbers do not indicate how many units responded per CFS, and backup is not distributed equally across all CFS.

**Table 2.11: Backup Response**

Call Origin and Unit	Count of Events	% of Events
<b>Primary Units</b>		
Crime	898	13.18%
Service	2,813	41.28%
Traffic (MV crashes only)	179	2.63%
Traffic (No MV Crashes)	405	5.94%
<b>Subtotal</b>	<b>4,295</b>	<b>63.02%</b>
<b>Backup</b>		
Crime	710	10.42%
Service	1,473	21.61%
Traffic (MV crashes only)	139	2.04%
Traffic (No MV Crashes)	198	2.91%
<b>Subtotal</b>	<b>2,520</b>	<b>36.98%</b>
<b>Totals</b>	<b>6,815</b>	

Source: Agency Provided CAD Data

BerryDunn also examined the percentage of backup units by the SPD against prior studies. This data is represented in Table 2.12. The range of the percentage of primary response to CFS from the comparison studies is from 46% to 72%, and the range of backup response is from 28% to 54%. The average from these studies is 55% primary response to 45% backup. At 63.02%, the SPD is on the higher end of the range for primary response, which places them on the lower range for backup, at 36.98%.

**Table 2.12: Backup Response – Comparisons**

Prior Studies	Community-Initiated Primary Response	Community-Initiated Backup Response
Averages	55%	45%
Range	72% to 46%	28% to 54%
Sandy PD	63.02%	36.98%

\*Table includes data from prior studies conducted by the IACP.

Source: Agency Provided CAD Data

In some agencies, the number of backup units on CFS suggests some over-response by patrol units. This is not a noted pattern for the SPD. The higher percentage of primary CFS events suggests a reasonable ratio of primary versus backup units responding to CFS.

## 2.4 Patrol Staffing Calculations

As noted previously, BerryDunn patrol staffing requirements are determined by evaluating the total workload in hours against hours of officer availability. Officers are not able to work for a variety of reasons, including days off, vacation, sick leave, holiday time, and training obligations. To define staffing needs, deploy officers properly, and evaluate productivity, it is necessary to calculate the actual amount of time officers are available to work. To assist in these calculations, BerryDunn obtained detailed patrol leave data from the SPD.

### Patrol Availability

Table 2.13 demonstrates the amount of time patrol officers have available for shift work. This table starts with the assumption that officers work a 40-hour work week. This computation is 52 weeks x 40 hours = 2,080 hours per year. To have a more accurate picture of how many hours per year the average officer is available to work, various leave categories must first be deducted from this total. Table 2.13 shows that after subtracting leave categories from the total, the average patrol officer is available to work 1,588 hours per year (rounded down), not 2,080 hours as is often thought (understanding that this represents the cumulative average and individual officer availability can vary greatly).

**Table 2.13: Patrol Availability**

Annual Paid Hours	2080	*Study Averages
<b>Leave Category</b>		
Vacation	137	140
Illness/Sick	90	54
COMP Used	55	43
Holiday	65	75
Family Care	3	
Bereavement	11	
Training	131	76
<i>Subtotal (minus)</i>	492	
<b>Average Annual Availability (Hours)</b>	1,588	1,668

Source: Agency Provided Data

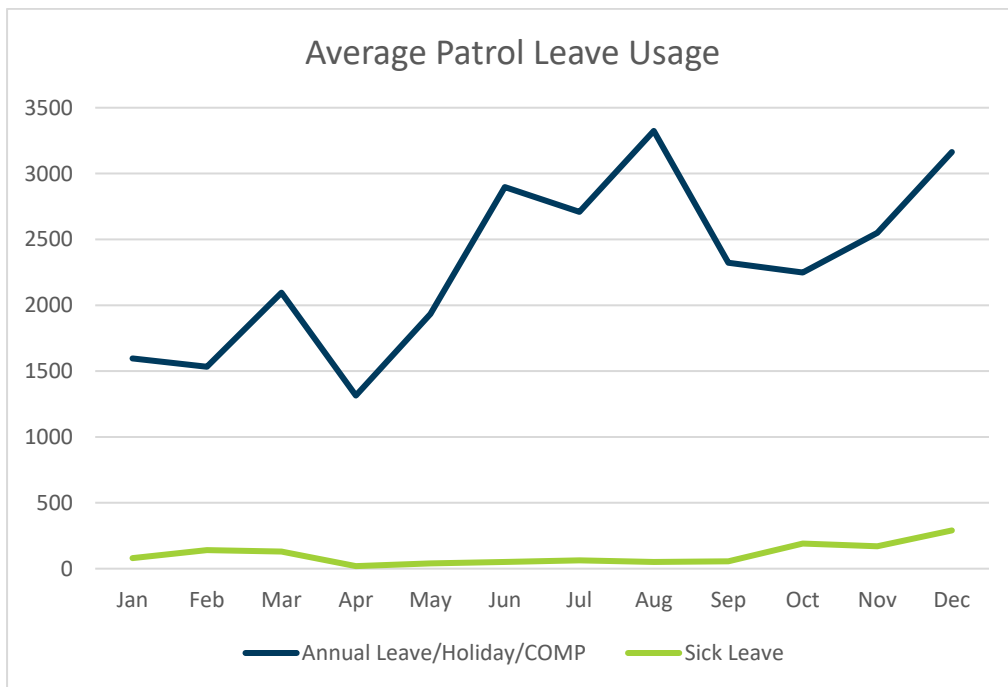
The data in Table 2.13 also reflects average leave times by category from several prior studies. The overall totals for the SPD are roughly 80 hours higher than the comparisons leaving SPD with 80 hours less of availability.

Understanding the actual amount of work time available for officers is central to building a work schedule and for working to ensure that adequate shift coverage is attained in relation to CFS needs. It is also a critical component in calculating staffing demands based on an examination

of workload against worker capacity. In addition to understanding how much time officers have available to them for scheduling purposes, it is also important to understand when they are not available because peaks and valleys in the use of leave time can complicate the process of maintaining coverage within the work schedule.

In Figure 2.5 below, the patterns of annual leave for patrol officers are broken down by month.

**Figure 2.5: Annual Leave Hours By Month – Patrol**



Source: Agency Provided Data

As is expected, the use of vacation, comp, and holiday leave time peaks during the summer months and rises again during the holiday season in November and December. Sick time usage at SPD remains low and relatively consistent throughout the year. Due to the variations in the use of vacation, comp, and holiday time, the work schedule should have the flexibility to be adjusted to these patterns so that staffing resources are used efficiently.

As part of this evaluation, BerryDunn asked the SPD to provide data on average annual training hours for patrol and investigations. A list of the annual required in-service training is provided in Table 2.14. This table also shows the average total training hours for patrol and investigations. The average total for patrol is 131, and this number has been used as part of Table 2.14.



**Table 2.14: Required Training Hours**

Required In-Service Training	Hours	Frequency
Use of Force	8	Annual
Firearms	8	Annual
Emergency Driving	10	Every two years
First Aid	2	Every two years
Ethics	1	Annual
Equity	3	Every three years
Airway Circulatory Anatomy	2	Every three years
Mental Health/Crisis Intervention	3	Every three years
Communicable Disease	0.5	Every two years
Communications with Disabled People	0.5	Every two years
Taser	2	Annual
LEP Services	0.5	Every two years
PREA	0.5	Annual
<b>Avg. Patrol Training Hours</b>	<b>131</b>	<b>Annual</b>
<b>Avg. Investigations Training Hours</b>	<b>175</b>	<b>Annual</b>

Source: Agency Provided Data

## Shift Relief Factor

Another mechanism for understanding the number of officers required to staff a schedule is through determining the *shift relief factor*. The shift relief factor is the number of officers required to staff one shift position every day of the year. To calculate the shift relief factor, the average availability for each officer, as displayed in Table 2.5, is used. For the SPD, one position requires 4,380 hours per year to staff (12 hours x 365 days = 4,380 hours). Therefore, the shift relief factor is calculated to be 2.76 ( $4,388/1,588 = 2.76$ ). At SPD, patrol officers and sergeants work 12-hour shifts Monday through Saturday and eight-hour shifts on Sunday. To determine the shift relief factor for eight-hour shifts, the same formula is followed, and the shift relief factor is 1.84. To determine the shift relief factor for a 24-hour period, this number is multiplied by the number of expected shifts. For the purposes of the study BerryDunn used 12-hour shifts throughout the week.

**Table 2.15: Patrol Watch Shift Hours**

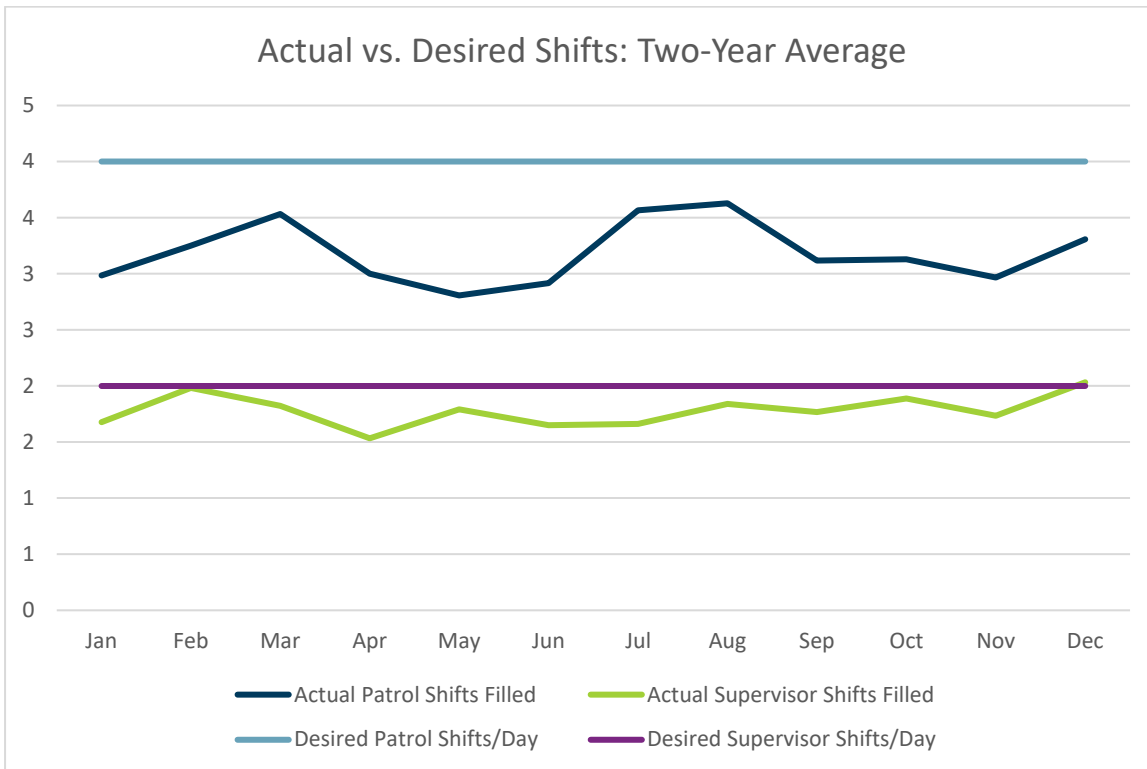
Shift	Begin	End	# of Hours	Maximum No. Scheduled per Day	Shift Minimum (formal/informal)	Corporal or Sergeant Y or N	Other Supervisor Y or N
Dayshift (Mon. to Sat.)	0600	1800	12	2	1	N	N
Dayshift Sgt. (Mon. to Sat.)	0600	1800	12	1	0	Y	N
Nightshift (Mon. to Sat.)	1800	600	12	2	1	N	N
Nightshift Sgt. (Mon. to Sat.)	1800	600	12	1	0	Y	N
Dayshift (Sunday)	0600	1400	8	1	1	N	N
Dayshift 2 (Sunday)	1000	1800	8	1	1	N	N
Dayshift Sgt (Sunday)	0800	1600	8	1	1	Y	N
Nightshift (Sunday)	1600	0000	8	1	1	N	N
Nightshift 2 (Sunday)	2200	0600	8	1	1	Y	N
Nightshift Sgt (Sunday)	2000	0400	8	1	1	N	N

Source: Agency Provided Data

Table D-3 above shows the start and finish times for the various patrol shifts in use by the SPD. This table also shows the minimum staffing levels and personnel allocations for each shift and includes data on supervisor staffing. SPD patrol staffing is separated into two teams: Team 1 weekdays/nights and Team 2 weekdays/nights. Both teams work on Sundays. Patrol works on a two-week rotation of 80 hours scheduled over the two-week period. Each Sunday shift is an eight-hour shift.

BerryDunn also asked the SPD to manually calculate the actual work shifts for each month for 2021 and 2022, an average of these data are reflected in Figure 2.6. This figure includes staffing of all positions in patrol, including supervisors. Based on the data in Table 2.15, desired/maximum daily staffing for patrol should be four shifts, and the desired/maximum daily staffing for supervisors is two shifts. Although the total number of daily patrol shifts filled fluctuates from month to month, the total average across the year was approximately 3.25 per day. The desired supervisor shifts are set at two, and averages across the calendar year met that mark. The data in Figure 2.6 are important because they help to illustrate actual staffing, as opposed to officer allocations. Based on these data, the SPD has not operated at optimal staffing levels. Instead, the SPD is often operating at or below desired staffing levels.

Figure 2.6: Actual Versus Desired Shifts



Source: Agency Provided Data

In Table 2.16, BerryDunn reflects the number of personnel needed to staff the current stated daily shift minimums.

Table 2.16: Shift Relief Factor Calculations

Shift Hours	Raw Shift Hours Total Annual	Shift Relief Factor	Number of Daily Shifts	Officers Required to Staff Minimums
12	4380	2.76	4	11

Source: Calculations from Agency Provided Data

The stated number of personnel in Table 2.16 is 11, the current allocation of personnel to patrol primary CFS response for the SPD is eight. Given scheduling demands, and the communities desire to have officers at community events and employing proactive policing strategies, BerryDunn recommends an increase of three personnel in patrol.

### Workload Model and Analysis

As mentioned previously in this report, BerryDunn relies heavily on understanding the patrol workload to understand staffing needs. Measurement standards make it possible to evaluate and define patrol staffing and deployment requirements, and BerryDunn uses a specific model for doing this. The primary standards employed for the SPD assessment include:

- Operational labor
- Administrative labor
- Uncommitted time

In the workload model used by BerryDunn, 30% is allocated to each of the labor areas, with a 10% buffer available to allow for daily variances.

### **Operational Labor**

Operational labor is the aggregate amount of time consumed by patrol officers to answer CFS generated by the public and to address on-view situations discovered and encountered by officers. It is the total of criminal, non-criminal, traffic, and backup activity initiated by a call from the public or an incident an officer comes upon (obligated workload). When expressed as a percentage of the total labor in an officer's workday, operational labor of first response patrol officers should not continuously exceed 30%. As previously indicated, to quantify the amount of workload volume, the BerryDunn team conducted a thorough examination of CAD data provided by the SPD. Table 2.17 reflects the aggregate data for all sworn staff in the CAD dataset provided to BerryDunn (this is a more detailed version of Table 2.2). All sworn staff is an important distinction in these data. In many cases only patrol primary CFS takers data is included; however, at SPD, when call volume increases or calls are holding with no available patrol officer to respond other sworn staff respond, this is known as *supplanting*. In Table 2.11 above, only patrol hours were calculated.

As noted previously, BerryDunn took the original CAD dataset and separated the data into categories for different work assignments (e.g., patrol, supplemental patrol, and investigations). The data was also separated to reflect community- and officer-initiated activity. After making these adjustments, the obligated workload for patrol was determined to be 3,079 hours. Through this analysis, BerryDunn determined that staffing across the 24-hour period is not sufficient to meet obligated workload totals. BerryDunn will elaborate later in this section.

**Table 2.17: Obligated Workload**

Patrol Workload Calculation	Count of Incidents	Time per Incident	Hours
<b>Primary CFS (Patrol Only)</b>			
Crime	1,109	32.03	591.99
Service	3,219	2.88	154.25
Traffic (M/V Crashes Only)	207	292.36	1,008.65
Traffic (No MV Crashes)	453	17.41	131.41
<b>Primary CFS Totals</b>	<b>4,988</b>	<b>22.69</b>	<b>1,886.30</b>
<b>Backup (Patrol Only)</b>			
Crime	937	30.92	482.81
Service	1,832	3.22	98.24
Traffic (MV Crashes Only)	181	184.66	557.07
Traffic (No MV Crashes)	241	13.46	54.08
<b>Backup Totals</b>	<b>3,191</b>	<b>22.42</b>	<b>1,192.20</b>
<b>Patrol Workload Total</b>	<b>8,179</b>	<b>22.58</b>	<b>3,078.50</b>

Source: Calculations from Agency Provided Data

Table 2.18 outlines the daily workload volume for the SPD. The SPD works a combination of 12-hour shifts and 8-hour shifts. BerryDunn provided analysis of both; however, it should be noted the calculations do not account for the combination of both shift durations. The calculations below represent 8- or 12-hour shifts for all seven days of the week. From a purely numeric perspective, this data suggests that two daily shifts for twelves and four daily shifts for eights can manage the workload volume. Although Table 2.18 suggests that the workload volume can be managed using two or four daily shifts, this presumes an equal distribution of CFS throughout the day. Additionally, this does not account for backup or double coverage across each shift on a 24/7 basis. This table also includes data from all sworn SPD staff and not just primary CFS takers.

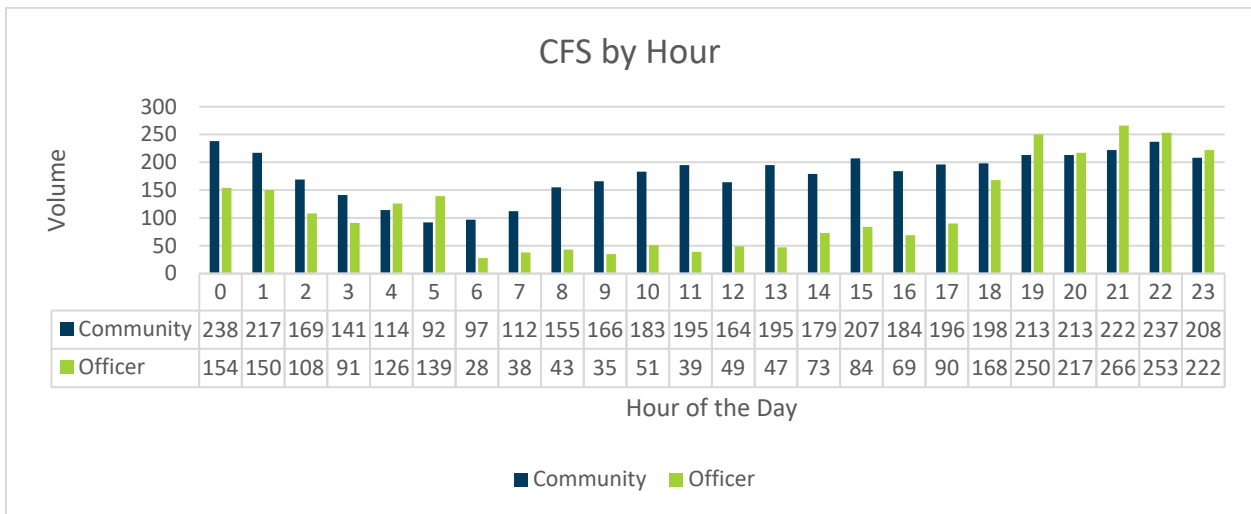
**Table 2.18: Daily Shift Needs**

Daily Shift Needs					
	Primary	Backup	Total	Officer Available	Daily Officers
Shift	Min/Day	Min/Day	Min/Day	Min/Day	Required
12	310	196	506	216	2
8	310	196	506	144	4

Source: Calculations from Agency Provided CAD Data

Figure 2.7 reflects that the hourly CFS distribution for the SPD is not equal. The distribution of CFS for the SPD deviates from other studies BerryDunn has conducted. The low point of volume for the SPD occurs at around 5:00 a.m., and the peak volume occurs around 10:00 p.m. As BerryDunn will show later in this section, the peak volume, and the need to provide double coverage across all hours, requires staffing that exceeds strict numeric calculations.

**Figure 2.7: CFS by Hour of the Day**



Source: Agency Provided CAD Data

In Table 2.19, the data from Figure 2.7 is displayed, based on the percentage of overall CFS volume by hour of the day. The CFS data in Table 2.19 has been separated into three segments (and color-coded), which cover the hours of 0600 – 1700, 1300 – 0100, and 1800 – 0600. These time frames were used because they most closely resemble the shift hours used by police departments and the SPD.

Table 2.19: CFS by Hour – Shift Configuration

Community			Officer		
Hour	CFS Total	Percent	Activity	Percent	
0700	138	2.77%	43	1.42%	
0800	183	3.67%	48	1.58%	
0900	211	4.23%	43	1.42%	
1000	229	4.59%	57	1.88%	
1100	243	4.87%	52	1.71%	25.07%
1200	218	4.37%	57	1.88%	
1300	254	5.09%	56	1.85%	
1400	256	5.13%	87	2.87%	
1500	285	5.71%	103	3.39%	
1600	234	4.69%	83	2.73%	
1700	241	4.83%	103	3.39%	
1800	233	4.67%	189	6.23%	
1900	241	4.83%	266	8.76%	71.80%
2000	236	4.73%	249	8.20%	
2100	242	4.85%	288	9.49%	
2200	242	4.85%	269	8.86%	
2300	219	4.39%	235	7.74%	
0000	241	4.83%	156	5.14%	
0100	218	4.37%	151	4.98%	74.93%
0200	171	3.43%	108	3.56%	
0300	143	2.87%	92	3.03%	
0400	115	2.31%	128	4.22%	
0500	95	1.90%	143	4.71%	
0600	100	2.00%	29	0.96%	
Total	4988	100.00%	3035	100.00%	

<b>0700 – 1500</b>	<b>34.72%</b>
<b>1500 – 2300</b>	<b>39.17%</b>
<b>2300 – 0700</b>	<b>26.10%</b>

Source: Agency Provided CAD Data

The data in Table 2.19 is important because it provides a clear picture of CFS distribution based on different sections of the day, which also track with shift and personnel allocations. As shown in this table, the bulk of community-initiated CFS, more than 39.17%, occurs between 3 p.m. and 11 p.m. (1500 – 2300). In addition, the data in Table 2.19 shows 34.72% of CFS volume

occurring between 7 a.m. and 3 p.m. (0700 – 1500), and 26.10% of the CFS activity occurring between 11 p.m. and 7 a.m. (2300 – 0700). Again, this is a very typical distribution of CFS activity.

One of the reasons for analyzing CFS volumes by month, day of the week, or hour of the day is to look for patterns that the department can use to analyze personnel allocations and staffing in hopes of more efficiently deploying personnel during the times when the most activity is occurring. Although BerryDunn favors this type of analysis and acknowledges it is a significant aspect of work schedule design, the volume of activity is not the sole factor to be considered in terms of scheduling personnel. Based strictly on the percentage of CFS reflected in Table 2.19, one might consider scheduling only 19% of the patrol staff from 11 p.m. to 7 a.m. However, CFS that occur at night often involve some of the most dangerous activities that the police must deal with, and most of these incidents require multiple personnel. In addition, this type of personnel allocation would not sufficiently support the City’s public safety needs.

In Table 2.20, BerryDunn provides the average number of CFS SPD officers should be managing daily. Because the SPD’s time per CFS is lower than other studies, this increases the number of CFS they can reasonably manage.

**Table 2.20: CFS Capacity by Shift Length**

Shift Length	Total Minutes	Total CFS Time	SPD Number of CFS/Shift	Prior Studies Number of CFS/Shift
12	720	216	5.83	4.45
10.5	630	189	5.10	3.89
10	600	180	4.86	3.71
8	480	144	3.89	2.97
<b>SPD Total Minutes per CFS</b>				37.03
<b>Prior Studies Minutes per CFS</b>				48.56

Source: Calculations from Agency Provided CAD Data

In the top portion of Table 2.21, BerryDunn outlines staffing needs for the SPD based on a 12-hour shift structure. This data seems to suggest that three officers per day and a total of eight officers assigned to patrol as primary CFS takers would be sufficient to manage workload demands; however, BerryDunn will explore this data further in the tables below. This data includes all SPD sworn staff and not just primary CFS takers.



**Table 2.21: Officers Required by Shift**

Current Daily Events	0600 – 1800	1800 – 0600	Total	Shift Relief Factor	Total Officers
<b>Total Annual Hours</b>	1763.69	1314.82			
Minutes/Day	289.92	216.13			
Officers	1.34	1.00			
<b>Officers Required</b>	<b>2</b>	<b>1</b>	<b>3</b>	<b>2.76</b>	<b>8.28</b>

Current Daily Events	0600 – 1300	1300 – 0100	0100 – 0600	Total	Shift Relief Factor	Total Officers
<b>Total Annual Hours</b>	841.42	1950.94	286.14			
Minutes/Day	138.32	320.70	47.04			
Officers	0.64	1.48	0.22			
<b>Officers Required</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>4</b>	<b>2.76</b>	<b>11.04</b>

Staffing Needs	0600 – 1800	1300 – 0100	1800 – 0600	Total	Shift Relief Factor	Total Officers
<b>Recommended</b>	<b>2</b>	<b>*</b>	<b>2</b>	<b>4</b>	<b>2.76</b>	<b>11.04</b>

Source: calculations from data provided

\*Should help ensure minimum of two officers staffed during this period.

In the bottom section of Table 2.21, BerryDunn has split the data from Table 2.20 into smaller segments that respond to peak CFS volumes. Based on this layout, the number of personnel required changes. The section highlighted in light blue reflects a requirement for four daily shifts requiring four officers; however, that configuration would leave a single officer working during much of the day and overnight, neither of which are appropriate given the workloads and service demands within the City. When shifts are moved to provide dual officer coverage 24/7, the total is four shifts per day, requiring a total of 11 officers (rounded). As noted previously, the SPD has eight officers allocated to CFS response. It is BerryDunn’s position that this is not the appropriate number of personnel, and three additional staff are needed to support patrol operations.

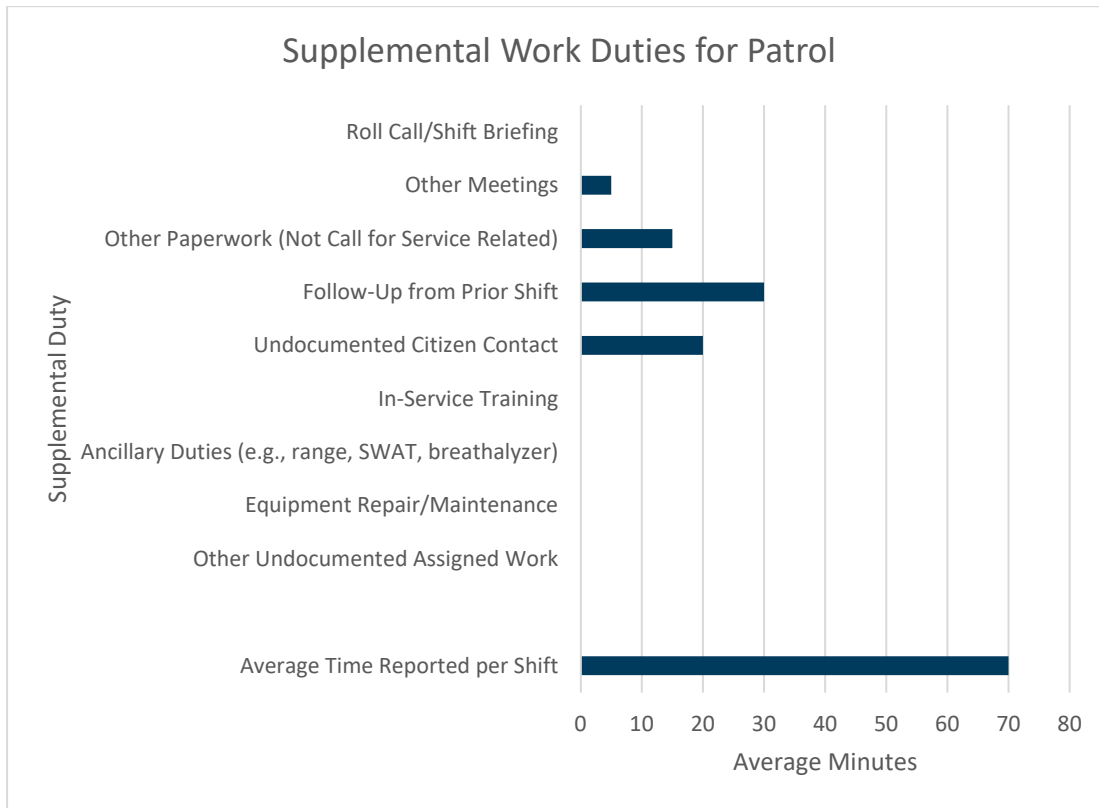
### Administrative Labor

Precise information is typically not available in CAD for many administrative activities due to variances in the way agencies and officers record these activities. The interviews and field observations by BerryDunn suggest that administrative time for the SPD appears to be at the norm. Industrywide, administrative time generally accounts for approximately 25% – 30% of an officer’s average day, which appears to be the case at the SPD. This percentage can seem high to those not acquainted with the patrol function; however, a review of typical patrol activities supports this average.

- Report writing and case follow-up (variable)
- Patrol briefings (15 minutes)
- Administrative preparation/report checkout (30 minutes)
- Meal and personal care breaks (30 minutes)
- Court attendance (day shift)
- On-duty training, not otherwise captured (variable)
- Vehicle maintenance and fueling (15 minutes)
- Meetings with supervisors (variable)
- Special administrative assignments (variable)
- Personnel/payroll activities (health fairs, paperwork review, and paperwork)
- Field Training Officer (FTO) time for both trainee and trainer (variable)
- Equipment maintenance (computer, weapons, radio) (variable)

To attempt to illustrate allocations of administrative time that are unaccounted for in CAD, BerryDunn asked the patrol officers to complete a worksheet and survey during two of their patrol shifts. Officers were asked to record time spent on certain activities and to report this back via an online survey. Figure 2.8 below provides the breakdown of the information received from the shift responses:

**Figure 2.8: Self-Reported Supplemental Workload**



Source: SPD Patrol Workforce Survey

The average time reported for supplemental work by each officer for each shift was approximately 70 minutes. This does not include reports associated with CFS. It is also noteworthy that this survey spanned two of the officers’ normal shifts (BerryDunn did not identify which shifts to use). While representative of the supplemental workload, it is possible that a longer period of analysis might provide varied results. Regardless, the numbers above help to demonstrate a substantive administrative workload, which is otherwise not typically captured or considered.

**Uncommitted Time**

The cumulative operational and administrative labor that officers must engage in should not be so significant that they are unable to respond to emergencies in a timely fashion or engage in mission-critical elective activities and problem-solving efforts. A portion of the workday must be uncommitted to any other type of labor. Uncommitted time allows officers to do the following:

- Have and initiate public-service contacts
- Participate in elective activities selected by the agency, such as community policing and problem-solving
- Make pedestrian and business contacts
- To conduct field interviews

- To engage proactive traffic stops and proactive patrol efforts

Uncommitted time is the time left over after officers complete the work associated with both obligated/committed time and administrative time.

### **Staffing Projections**

One of the key deliverable items of this report involves determining current staffing needs, and then projecting those needs out to the year 2030. These projects are a critical element in developing a long-range staffing plan for the SPD.

Table 2.22 below provides a snapshot of our calculation for determining staffing needs. This table reflects *current staffing*, and projects staffing increases based on our mode of calculations. It is important to understand how we constructed this table and these figures, so that we can have a meaningful discussion regarding the structure of the organization. We will explain the various sections of the table before explaining the numbers.

First, the area in orange in the table above reflects the population estimates from the U.S. census. As it has already been mentioned, these numbers are very difficult to predict, but we consider the estimates from the US Census an accurate, if not conservative estimate of the future population for the City. The population number is the baseline of what drives the remaining calculations in this model. If the population numbers were to change, either up or down, it could ultimately affect the entire projection model.

The next numbers that require explanation, which are shown in orange, include the following:

- **Base CFS Hours:** This number represents the total obligated workload for those officers assigned to handling CFS as a primary duty. It includes all citizen-initiated CFS, as well as other non-discretionary workload managed by patrol officers assigned to manage CFS.
- **Base Officer Hours:** This is the average number of hours available to patrol staff responsible for CFS. Although the cost of employees typically involves calculating their hourly rate times 2,080 hours (plus benefits), the actual number of hours each employee works is reduced by several factors, including vacation, sick leave, holidays, training, and other *non-productive* time. The Base Officer Hours total is a reflection of the 2,080 hour total, minus the average number of non-productive hours.
- **Total Sworn:** This is the total number of authorized sworn positions for the agency (regardless of vacancies), as reported by the department. In instances in which this number is below our recommended level, we will adjust the number to reflect our recommendation.
- **Total Non-Sworn:** This is the total number of non-sworn personnel authorized for the agency for all positions (regardless of vacancies), as reported by the department.

Our projection model uses a workload factor that is calculated against the population in order to project future staffing needs. This projection model assumes that the make-up of the population (demographic) will remain relatively constant as it grows. This is important because different demographics demand different levels of police service. The first calculation of the model involves

creating a ratio of service demand per person in the community. This is done by dividing the number of CFS hours against the current population. Using this ratio, we can project how much service need there will be, as the population grows.

**Table 2.22: Future Workload Projections**

	Base Population	Base CFS Hours	Base Ratio CFS Hours per Person	Base Officer Hours	Base Officer 30% Hours	Staffing Patrol	Patrol % of Total Sworn
2022	12,953	3,079	0.24	1587.64	476.29	8	47.06%
2024	13,294	3,160				11	55.00%
2026	13,635	3,241				11	55.00%
2028	13,976	3,322				11	55.00%
2030	14,317	3,403				11	55.00%

	Base Invest.	Base Ratio Inv./Patrol	Staffing Invest.	Total Sworn	Non-Patrol Sworn*	Total Sworn Ratio to Population	Total Non-Sworn	Total Non-Sworn Ratio to Population
2022	1	0.13	1	16	8	809.56	3	4317.67
2024			1	19	8		3	
2026			1	19	8		3	
2028			1	19	8		3	
2030			1	19	8		3	

\*Includes four patrol sergeants

Source: Calculations from Agency Data Provided

For SPD staffing needs are driven by not only obligated workloads but by community demands and officer safety. As stated above SPD is supported by the community and community members want and expect SPD officers to be present at community events and generally engaging with the community. This includes participating in proactive policing strategies such as traffic enforcement. Additionally, the location of the Clackamas County Jail some 23.1 miles away takes officers out of the City should an arrest be made. If only one officer is working when an arrest is made the City could be left without police services or forced to rely on mutual aid from surrounding agencies. Based on BerryDunn’s staffing recommendations, the SPD should be able to manage obligated workload volumes, across all hours of the day, irrespective of the predicted population growth (at least through 2030), and the additional CFS that would accompany such growth.

## Patrol Staffing Summary

Based on the data provided and the overall analysis, it is BerryDunn's assessment that staffing within the Patrol Division should be increased to manage obligated workload volumes and to accommodate the appropriate distribution of personnel. This would increase the allocation of personnel for patrol to 11 officers, plus four sergeants. As mentioned previously, this number will be sufficient to maintain appropriate staffing of the Patrol Division.

Importantly, BerryDunn's recommendation of increasing staffing to 11 officers reflects the optimal number of officers required to operate and to respond to CFS effectively and efficiently. This number is considered the *operational minimum*, and it is the baseline for staffing, not the maximum. Equally as important is understanding that the department occasionally has personnel who are non-operational, meaning that due to the Family Medical Leave Act (FMLA), military leave, or injury, they are unable to fulfill their duties. For calculating staffing needs, non-operational personnel are essentially vacancies, which must be filled to work to ensure staffing at the *operational minimum* level. Currently the Patrol Division has one vacancy. Notably, the SRO's are not a primary CFS taker nor are the sergeants assigned to patrol.

To maintain minimum operational staffing levels, some agencies discuss using *over-hires* in order to cover the lag time associated with hiring and training personnel. Rather than discussing over-hires, BerryDunn suggests that agencies should establish a *minimum operational level*, which help ensure maximum operational efficiency, and then setting a new *authorized staffing level*, which offsets agency attrition levels and the vacancies that occur because of non-operational personnel.

## 2.5 Patrol Work Schedule

Many law enforcement agencies struggle with designing work schedules that efficiently and optimally deploy available patrol resources. As an element of this project, BerryDunn evaluated the layout, structure, effectiveness, and efficiency of the patrol schedule for the SPD against best practices standards and against available workload data. Based on the scope of our work, BerryDunn's evaluation was expected to produce one of three possible findings:

- The patrol schedule is generally meeting operational objectives.
- Making adjustments to certain schedule components within the current structure could contribute to greater effectiveness and efficiency.
- Several areas of patrol schedule effectiveness or efficiency are not being met, and it is likely that a full redesign of the schedule will be necessary to optimize effectiveness.

As part of this project, BerryDunn asked the SPD to complete a self-assessment of its patrol work schedule against a set of prescribed standards. The instructions for completing the self-assessment tool are provided below.

### Instructions and Instrument Scoring

- 25 – 22: If the patrol schedule scored in this range, it is likely relatively efficient and generally meeting operational objectives; however, if there are any components within Section 1 that were scored as a 1 or 0, adjustments may be required.
- 21 – 18: If the patrol schedule scored in this range, it is likely that adjusting the components of the schedule would improve its effectiveness and efficiency. Priority consideration should be given to any component in Section 1 that was scored as a 1 or 0.
- 17 or below: If the patrol schedule scored in this range, there are several areas of effectiveness or efficiency that are not being met by the current design. It is likely that a full schedule redesign will be necessary to optimize effectiveness.

Based on the self-assessment outlined in Table 2.23, the SPD scored 19 on this instrument. This suggests that some modifications to the schedule might be appropriate. It is noteworthy that all the reduced point values occurred in Section 1 of the evaluation tool. These areas relate to operational efficiency and flexibility.

**Table 2.23: Patrol Schedule Analysis**

Schedule Components	Rating
<b>SECTION 1</b>	
Maximized shift coverage during the periods of greatest need for services (assessed by hour, day, month, and/or season)	1
Providing overlaps in coverage across all shift changes	1
Flexibility to accommodate vacations, individual training, holidays, and predictable sick leave	1
Minimized use of overtime to manage predictable leave (e.g., vacation, training)	1
Reduction of significant peaks and valleys in daily personnel allocations that occur due to leave patterns	1
Ensuring appropriate staffing levels in all patrol beats/zones	1
Availability of supplemental staff to manage multiple and priority CFS in patrol beats/zones	2
An allocation or allowance of time for in-service training and internal meetings	2
Integration of first-line supervisors into the overall schedule in a manner that includes consistent supervision of personnel groups or teams	2
<b>Subtotal Section 1 (maximum of 18)</b>	<b>12</b>
<b>SECTION 2</b>	
Using a single shift duration	1
Substantial consistency and continuity of shift rotations	1
Limiting scheduled work hours to no more than 2,080, inclusive of leave time or holiday time (unless budgets or labor practices provide otherwise)	1
Reducing available scheduled work time for each patrol officer, based on holiday hours allocated as leave time (reducing work time from 2,080 hours)	1
Conformity with labor contracts, or Fair Labor Standards Act (FLSA) allowances for public safety employees, which prescribe the maximum hours allowed within a work cycle or year	1
A plan for easy and consistent inclusion of additional work shifts as the workforce grows on a temporary or a permanent basis (e.g., SROs who are available during summer months)	1
A mechanism for adjusting patrol personnel deployments, without significant service disruption, following a temporary or permanent reduction in force	1
<b>Subtotal Section 2 (maximum of 7)</b>	<b>7</b>
<b>OVERALL TOTAL SCORE (maximum score – 25)</b>	<b>19</b>



As indicated in Table 2.15, the SPD has a single supervisor position allocated to each day shift and each overnight team providing for adequate staffing coverage.

Due to staffing shortages the second patrol officer position frequently goes unfilled. This has limited the ability of staff to use the one hour of resilience time that is built into the schedule. It has also created an environment where officers are reluctant to engage in proactive policing for fear of not being available for a CFS.

BerryDunn assesses that although the patrol schedule is generally meeting operational objectives some modifications to the work schedule could improve overall efficiency and effectiveness.

The path to developing an efficient work schedule that optimizes the effective deployment of patrol personnel requires thoughtful consideration of several overarching goals:

- Reducing or eliminating predictable overtime
- Eliminating peaks and valleys in staffing due to scheduled leave
- Providing sufficient staff to manage multiple and priority calls
- Satisfying both operational and staff needs, including helping to ensure a proper work/life balance and equitable workloads for patrol staff
- Working to ensure appropriate supervision on all shifts

Designing a schedule that accomplishes these goals requires an intentional approach that is customized to each agency's characteristics (e.g., staffing levels, geographic factors, crime rates, zone/beat design, contract/labor rules), and there are several key components that bear consideration in that process.

The sergeants, and officers assigned to patrol, work 8- and 12-hour shifts and follow a two-week rotation, allowing for each officer to be off every other weekend. Table 2.24 depicts the number of officers working in patrol based on the hour of the day. Table 2.24 assumes full staffing across the shift.

Table 2.24: Patrol Allocations by Hour

Monday to Saturday								Sunday									
Hour	Dayshift	Dayshift Sgt.	Nightshift	Nightshift Sgt.	Patrol Officer Total	Patrol Sgt. Total	Total	Hour	Dayshift	Dayshift 2	Dayshift Sgt.	Nightshift	Nightshift 2	Nightshift Sgt.	Patrol Officer Total	Patrol Sgt. Total	Total
0600	2	1			2	1	3	0600	1						1		1
0700	2	1			2	1	3	0700	1						1		1
0800	2	1			2	1	3	0800	1		1				1	1	2
0900	2	1			2	1	3	0900	1		1				1	1	2
1000	2	1			2	1	3	1000	1	1	1				2	1	3
1100	2	1			2	1	3	1100	1	1	1				2	1	3
1200	2	1			2	1	3	1200	1	1	1				2	1	3
1300	2	1			2	1	3	1300	1	1	1				2	1	3
1400	2	1			2	1	3	1400		1	1				1	1	2
1500	2	1			2	1	3	1500		1	1				1	1	2
1600	2	1			2	1	3	1600		1		1			2		2
1700	2	1			2	1	3	1700		1		1			2		2
1800			2	1	2	1	3	1800				1			1		1
1900			2	1	2	1	3	1900				1			1		1
2000			2	1	2	1	3	2000				1		1	1	1	2
2100			2	1	2	1	3	2100				1		1	1	1	2
2200			2	1	2	1	3	2200				1	1	1	2	1	3
2300			2	1	2	1	3	2300				1	1	1	2	1	3
0000			2	1	2	1	3	0000					1	1	1	1	2
0100			2	1	2	1	3	0100					1	1	1	1	2
0200			2	1	2	1	3	0200					1	1	1	1	2
0300			2	1	2	1	3	0300					1	1	1	1	2
0400			2	1	2	1	3	0400					1		1		1
0500			2	1	2	1	3	0500					1		1		1

Source: Agency Provided Data

The hourly allocations in Table 2.24 provide the maximum staffing levels outlined in Table 2.15. Generally speaking, the coverage layout provided in Table 2.24 responds well to peak CFS volumes; however, the SPD has had difficulty maintaining full staffing, and there are inefficiencies in the current patrol schedule. These factors have resulted in the SPD regularly operating at shift minimums.

## Field Technology Assessment

As part of this assessment, BerryDunn asked the SPD to complete a technology survey. This instrument is designed to capture the field-reporting capacity of the law enforcement agency. The results of the SPD survey are included in Table 2.25.

**Table 2.25: Technology Scorecard**

Description	Main Score	Bonus	Total
Field Technology: Primary Score	89		
Bonus Score:		5	
Agency Totals:			94

Source: Agency Provided Data

The maximum score for this instrument is 100, or 115 when all possible bonus points are included. The SPD scored 94, which is higher than many other departments; however, there are opportunities to improve the use of technology within the agency, particularly in the field. Based on the survey, there are a few technology improvement areas worth mentioning:

- Not all patrol vehicles are equipped with in-car camera systems
- When creating custom reports the RMS does not have the capability to retrieve all the required data for analysis

## 2.6 Patrol Operations

### Solvability Factors

The SPD should review and revise how criminal cases are reviewed and assigned for follow-up. The case review and assignment process currently utilized by SPD is inefficient. One critical element of case review and assignment involves the use of solvability factors. The SPD does not formally or consistently engage the use of solvability factors as an assessment tool in determining which cases should be activated for additional investigation. This means that patrol and investigations supervisors spend a great deal of time reviewing reports which are not likely going to be assigned for follow-up investigation.

The reality of modern policing is that many CFS that include crimes reported to the police do not have actionable leads or those that would make investigation likely to produce a suspect. A great deal of research has been performed on what leads or evidence make a case likely to produce results and when the absence of such leads makes follow-up likely to be unproductive. These conditions are generally called solvability factors, and a weighted algorithmic scale of

these factors can provide guidance on the anticipated effectiveness or efficiency of investigative follow-up.

There are numerous variations of this assessment model, but most emanate from the foundational work done by the Rochester, NY, Police Department in the late 1970s. In that study, researchers isolated the common elements present in cases reported to the police that were successfully investigated. From that research, a series of common factors (solvability factors) were identified.<sup>3</sup> By considering whether one or more of these factors is present on any given case, police departments can focus their efforts on cases that have a reasonable opportunity for a successful resolution, and they can close those that are unlikely to be solved even with reasonable investigative effort.

Forwarding a case to investigations consumes time and energy from both patrol and investigations personnel who each must review and dispose of the case. Automated solvability factors deployed within RMS utilize software to make this process more efficient. The reporting officer documents the known factors about the incident, and the RMS automatically classifies and routes the case without investigations personnel having to spend time and energy to receive, review, assess, and dispose of the case.

Solvability factors include information such as whether there is a known suspect, whether there is a vehicle description, whether there are witnesses to the crime, and whether there is physical evidence. The sum of these factors comprises the baseline of a thorough preliminary investigation. If officers do not collect this information and report on it, one could reasonably assert that the preliminary investigation and/or the report was incomplete.

By design, requiring patrol staff to collect and record this information helps to ensure a thorough preliminary investigation, and it can expedite the process of determining whether a case should be forwarded to a detective for additional investigation. BerryDunn is unclear whether the RMS in use by the SPD has the capability to collect solvability factors. Regardless of how it occurs, BerryDunn recommends the SPD revise the report writing and approval process and include solvability factors as a required element within that process for all personnel generating criminal reports.

## Data Collection

Best practices for impartial policing suggest that police agencies should collect specific contact data to support ongoing monitoring of equitable policing practices. BerryDunn has learned the SPD does collect and record subject and incident data in its RMS on all police-related contacts (including calls for service), which is an industry best practice. This data is searchable, it supports monitoring of police-subject contacts in furtherance of impartial policing practices, it

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<sup>3</sup> Managing Criminal Investigations in Rochester, New York – A Case Study  
<https://www.ncjrs.gov/App/Publications/abstract.aspx?ID=92744>

also supports intelligence-led-policing (ILP) or criminal investigation efforts, and it assists in compliance with Freedom of Information Act (FOIA) requests.

## Summary

Staffing within SPD is not sufficient to meet the needs of SPD or the community. SPD should consider allocating three additional positions.


The patrol work schedule for the SPD is not effectively or efficiently meeting staffing and personnel distribution needs for the department. SPD should review the patrol schedule and possible options for a more efficient distribution of resources.


The SPD does not currently use solvability factors to determine whether a reported crime should be activated for investigation. The lack of use of solvability factors creates inefficiency, resulting in unnecessary time spent by patrol and investigative personnel reviewing reports that do not require follow-up.

## Recommendations

This section provides the two formal recommendations from this section, presented chronologically as they appear within the section. Each recommendation table below includes the section subsection, recommendation number and priority as assessed by BerryDunn, and details concerning the findings and recommendations.

**Table 2.26: Section 2 Recommendations**

Patrol Services		
No.	Staffing	Overall Priority
<i>Section 2, Subsection I: Personnel and Deployment</i>		
2-1	<b>Finding Area:</b> SPD does not have sufficient patrol staff to efficiently meet the patrol workload or the needs of the community. The Sandy community values the police department and in turn expects officers to be present at community events and engaged in community policing and proactive policing strategies.	
	<b>Recommendation:</b> SPD should add three additional sworn staff members.	

Patrol Services		
No.	Solvability Factors	Overall Priority
<i>Section 2, Subsection VI: Patrol Operations</i>		
2-2	<p><b>Finding:</b> The SPD does not currently formally engage the use of solvability factors as an element of conducting a preliminary criminal investigation. The use of solvability factors helps increase the quality of preliminary investigations and can assist decision-makers in determining which cases should receive additional investigation.</p>	
	<p><b>Recommendation:</b> The SPD should require the use of solvability factors by all staff who conduct preliminary criminal investigations and complete the associated reports. Solvability factors should be reviewed by patrol supervisors as a part of the incident report approval process and used to assist with the case activation and assignment process.</p> <p>Solvability factors should include information such as whether there is a known suspect, whether there is a vehicle description, whether there are witnesses to the crime, and whether there is physical evidence. The sum of these factors comprises the baseline of a thorough preliminary investigation. If officers do not collect this information and report on it, one could reasonably assert that the preliminary investigation and/or the report was incomplete.</p> <p>By design, requiring patrol staff to collect and record this information helps to ensure a thorough preliminary investigation, and it can expedite the process of determining whether a case should be forwarded to a detective for additional investigation. It is possible, but unclear, whether the RMS at SPD has the capability to collect solvability factors. Regardless of that capability, BerryDunn recommends their collection as part of the preliminary investigation process.</p> <p>Additionally, BerryDunn recommends the SPD revise the report writing and approval process and include solvability factors as a required element within that process for all personnel generating criminal reports.</p>	

### 3.0 Investigations Services

*This section includes an overview of the Investigations Division, examining staffing, case assignments, closure, routing, and supervision.*

Second only perhaps to patrol, the investigative function of any police organization is vitally important to operational and organizational success. The purpose of the Investigations Division is to investigate major crimes, narcotics cases, and to keep schools safe through SRO programs. The Investigations Division is tasked with investigating sexual assaults, white collar crime, felony property crime, child abuse, child pornography, aggravated and felony assaults, and death incidents. At SPD, the Investigations Division participates in several multi-agency teams to include the Clackamus County Human Trafficking Team, the Vehicular Major Crime Team, and they work with the Department of Health and Human Services (DHHS) and the Child Advocacy Center (CAC).

#### 3.1 Investigations Staffing

This section provides BerryDunn’s assessment of the staffing needs for the investigations function within the SPD. The details of this assessment are outlined in this Section.

Understanding appropriate staffing levels for investigations units is difficult, because there are no set standards for determining such staffing levels. Each agency is different, and the myriad variables make it impossible to conduct a straight agency-to-agency analysis. For example, it is difficult to track actual hours on a case. Time spent on cases is not consistent among investigators; in some cases, multiple investigators work on the same case, some supervisors are more attentive and close cases that are not progressing more quickly, different types of cases take longer to investigate, and various factors contribute to differences in determining which cases should be investigated and which should be suspended or inactivated.

The SPD uses a general investigations format, meaning that those assigned as investigators are expected to investigate all crime types. The current organizational structure for the SPD includes one general investigator who reports to a patrol sergeant. At SPD, the sergeant was assigned supervision of the investigator because he served as the investigator prior to being promoted to sergeant. The detective works four 10-hour shifts Monday through Thursday.

**Table 3.1: Investigations Division Staffing**

Investigations Unit	Sergeant	Det.	Totals
Investigations Unit	0	1	1
<b>*Total</b>	0	1	1

\*Includes Vacancies

Source: Agency Provided Data

There are many conditions that require immediate response by an on-duty investigator during normal business hours. Having only one detective creates challenges and the SPD lacks continuity of allocation of its investigator due to the current schedule configuration. The SPD

should adjust the investigations schedule such that the detective is persistently scheduled during normal business hours. This would require moving the detective off the current 10-hour shift Monday to Thursday and into an eight-hour shift Monday through Friday.

### 3.2 Workloads and Caseloads

Based on a normal work schedule, investigators are scheduled to work 2,080 hours per year; however, like patrol officers, negotiated leave and vacation time, holidays, sick and injured time off, training requirements, and compensatory time off mean that investigators are only available to conduct work assignments for about 1,641 hours per year. This is a significant discrepancy between total hours charged to the department and the actual availability for investigators to conduct investigations; see Table 3.2.

**Table 3.2: Investigations Availability**

Annual Paid Hours	2080	*Study Averages
Leave Category	Hours	Hours
Annual Leave	164.5	162.03
Holiday	8	39.91
Sick Leave	67	20.29
Military Leave		50.93
Workers Compensation/Injury		7.02
Compensatory Time	24.75	12.42
Other (Includes FMLA and Funeral)		
Training	175.00	80.74
<i>Subtotal (minus)</i>	439.25	
<b>Average Annual Availability (Hours)</b>	<b>1640.75</b>	1,700

\*Table includes data from prior studies conducted by the IACP.

Source: Agency Provided Data

The number of hours available for the investigator for the SPD is comparatively low based on data from other organizations, and this variation appears to be primarily isolated to the number of annual training hours. The training hours reflected in Table 3.2 are likely elevated due to supplemental duty assignments for the detective. The average available investigator hours from recent studies were 1,700, while the time available for the SPD investigator is 1,640.75. As noted, regarding patrol workloads, the number of actual hours available for investigators is an important consideration in determining staffing needs.

Table 3.3 identifies the average number of cases assigned to investigations for 2021 and 2022. The number of annual case assignments is low based on typical case allocations and is typical of a single investigator position.



**Table 3.3: Cases Assigned by Type and Year**

Assignments by Unit*	2021	2022	Two-Year Avg.	% Change
Investigations Unit	43	37	40	-13.95%
<b>Totals</b>	43	37	40	-13.95%

Source: Agency Provided Data

### 3.3 Investigations Staffing Discussion

Based on experience, observations, and interviews with investigators and supervisory personnel, BerryDunn knows that other duties and responsibilities consume a substantial amount of daily activity for investigators. To quantify investigative and non-investigative work efforts, BerryDunn provided an internet-based survey to the investigator. Within the survey, the investigator was asked to quantify the percentage of time they spent conducting various activities.

Table 3.4 shows the results of the workload questions from the survey. In addition to providing the data in Table 3.4 from the self-reported survey that relates to the SPD, BerryDunn has provided supplemental data from additional sources. Self-reported data from several recent studies have been averaged and included in the table below. The data in Table 3.4 also includes data from a national survey of police investigators, conducted by the IACP, using the same survey completed by the SPD investigators. More than 900 investigators, including nearly 350 supervisors, completed the survey, and this data has been included.

The comparative data in this table are very useful, particularly because there is a lack of standardized data relating to investigations units. When examining the SPD data against the comparisons, BerryDunn notes that some of the totals vary, whether compared to the prior study averages or the nationwide survey averages. One category in Table 3.4 stands out in particular. The SPD investigator reports spending 50% of his time handling investigations. This is more than double the comparisons. BerryDunn notes that SPD met with challenges in extracting this data and for fully accurate numbers the supervisor would have had to go through each case individually.

**Table 3.4: Investigations Workload Survey**

Category Options	Sandy PD		Prior Study	National Survey Averages		
	Detectives	Supervisors	Averages*	Det.'s	Supervisors	Total
Administrative/Other	1.00	0.00	8.48	5	8	7
Arrest	0.00	0.00	2.67	3	3	3
Community Contact	0.00	0.00	2.66	3	3	3
Crime Lab	0.00	0.00	1.23	3	1	1
Crime Scene Processing	0.00	0.00	2.31	4	4	3
Court/Trial Prep	1.00	0.00	2.04	2	2	2
District Attorney Follow-Up	1.00	0.00	2.97	2	1	1
Evidence Views/Disposition	1.00	0.00	2.11	2	1	1
Interviews	5.00	0.00	6.67	9	8	8
Investigations	50.00	0.00	23.08	21	14	14
Legal (e.g., Search/Arrest Warrant)	5.00	0.00	5.99	3	3	3
Meetings	3.00	0.00	4.61	4	4	5
Phone Calls/Emails	10.00	0.00	9.09	8	8	7
Report Writing	20.00	0.00	15.17	22	16	16
Supervisory Duties	0.00	0.00	5.01	0	14	15
Surveillance	0.00	0.00	2.56	4	4	4
Teaching	1.00	0.00	1.29	1	1	1
Threat Assessment	0.00	0.00	1.29	1	1	1
Training	1.00	0.00	2.21	2	2	2
Travel/Driving	1.00	0.00	3.54	3	2	3
<b>Total</b>	<b>100.00</b>	<b>0.00</b>	<b>99.92</b>	<b>102</b>	<b>100</b>	<b>100</b>

\*Table includes data from prior studies conducted by the IACP.  
 Source: SPD Investigations Workload Survey

Although they have comparative value, the numbers in Table 3.4 are somewhat subjective and limited based on how investigators understood the question categories and how they reported their time within the categories. Still, from a productivity standpoint, there is value in looking at these numbers to consider where investigators are placing their efforts and whether there are opportunities to add efficiencies to those processes.

Using the data from Table 3.4, BerryDunn calculates that the sections highlighted in grey account for 15% of the time of the investigator. Assuming that none of this time contributes to investigations work, this would reduce their availability by an additional 246.11 hours. These self-reported supplemental duty figures (non-investigative duties) from the SPD are low but

relatively consistent with prior studies, which range from 20% – 25%, and the national survey, which suggests investigators across the United States spend about 18% of their time on the same activities.

The SPD Investigations Division consists of one full-time investigator. Based on the data in Table 3.5 and looking strictly at averages, the Investigations Division, when fully staffed with one investigator who carries a full caseload, would average approximately four cases per month and would have about 38.16 hours of available investigation time per case.

**Table 3.5: Investigations Capacity per Detective**

Investigative Capacity	*Cases Assigned	**Number of Detectives	Annual Cases per Detective	Monthly Average per Detective	Average Available Hours per Year	Average Hours Available per Month	Average Hours Available per Case
Investigations Unit	43	1	43	4	1640.75	136.73	38.16

\*Current year data.

\*\*Reflects personnel assigned who carry a full caseload.

Source: Calculations from Agency Provided Data.

There are two assumptions in Table 3.5 that are worth noting. First, this table assumes full and ongoing staffing of the Investigations Division. If there are any shortages, the averages would be affected. Second, this table assumes that each case is disposed of monthly. Because that does not typically occur, the monthly average of four is the number added each month, not the number the investigator might have open or be investigating. This is one reason it is important for supervisors to monitor case progress and to work toward clearing cases as promptly as possible.

In analyzing this data BerryDunn does not recommend adding additional staff to the Investigations Division. BerryDunn does recommend changing the supervisory structure of the Investigations Division and this will be explored further later in this section.

The last item of significance in reference to Table 3.5 concerns the amount of time it takes to investigate certain cases. Based on the data available, SPD investigators currently have roughly 38.16 hours available to dedicate to each case investigation. To illustrate how this compares to other agencies from prior studies, BerryDunn has provided Table 3.6. Although some cases require substantially more time to investigate (e.g., homicide, robbery), many cases are resolved with 20 – 30 hours (or less) of investigative effort.

**Table 3.6: Investigations Capacity per Detective**

Investigation Unit	Agency Hours	*Average Study Hours
<b>People Crimes/Major Crimes</b>		
Crime Against Children		35.13
Child Crimes and Vulnerable Adults		43.27
Crimes Against People		25.63
Domestic Violence		9.21
Homicide		549.23
Major Crimes		244.12
Robbery		82.43
Sexual Offenses		39.08
Special Victims		47.20
Violent Crime		23.48
<b>Average Hours</b>		<b>90.37</b>
<b>Property Crimes</b>		
Auto Theft		27.10
<b>**District/General Investigations</b>	<b>38.16</b>	<b>25.52</b>
Fraud/Financial Crimes		20.63
Homeland Security/Intelligence		32.56
Property		24.32
<b>Average Hours</b>		<b>19.81</b>
<b>Narcotics</b>		
Narcotics and Organized Crime		125.85
<b>Average Hours</b>		<b>125.85</b>

\*Table includes data from prior studies conducted by the IACP.

\*\*Sandy PD does not separate data by investigation units.

Source: Calculations from Agency Provided Data

In the same survey in which investigators were asked to quantify and self-report their non-investigative time, BerryDunn also asked them to provide data related to their current and preferred caseloads; their responses are reflected in Table 3.7. As the SPD uses a general investigations format, the comparison categories from other studies and surveys in Table 3.7 do not neatly align with the SPD; however, it is notable that, based on investigators' self-categorization, the SPD caseloads and preferred caseloads are substantially lower than the comparisons provided.

**Table 3.7: Self-Reported Current and Preferred Caseloads**

Investigations Caseload	Sandy PD Current	*Prior Studies Current Avg.	National Current Avg.	Sandy PD Preferred	Prior Studies Preferred Avg.	National Preferred Avg.
Fraud/Financial Crimes		13	18		12	11
Homicide/Violent Crime		13	15		8	9
Other Crimes Against People		16	18		9	12
Property Crimes		20	18		11	11
General Investigations		11	14		7	9
Other Specialized Unit		12	13		9	9
Task Force		23	10		8	7
Vice/Narcotics		16	11		14	7
Sandy Case Data	9			7		

\*Table includes data from prior studies conducted by the IACP.

Source: Calculations from Investigations Workforce Survey

Table 3.8 provides additional survey data from the SPD, prior studies, and the national survey of investigators. The top portion of Table 3.8 reflects responses investigators gave when asked to identify what they felt the expected case closure timeline was within their agency, based on the listed categories. The bottom portion of Table 3.8 reflects responses investigators gave when asked to identify what they felt would be an optimal timeline for case closures in the same categories.

The SPD does not have a policy that guides case closure expectations. Case assignment and case management are done ad hoc through office conversations. As a result, any responses by SPD staff are either based on subjective thoughts and beliefs or, perhaps, based on anecdotal discussions with supervisors. Also, the SPD has only one investigator and because of this, moving one or two responses into another column would have a substantial effect on the results. With these caveats, BerryDunn notes that the responses from the SPD are generally higher than those reported in other studies and in the national survey.

**Table 3.8: Self-Reported Case Closure Expectations in Days Active**

Current and Reported	SPD	SPD	Prior Cities	Natl.	SPD	SPD	Prior Cities	Natl.
Case Closure Timelines	0-30	Pct.	0-30	Pct.	31-60	Pct.	31-60	Pct.
Serious People Crimes	0	0.00%	42.42%	54.95%	1	100.00%	20.94%	17.77%
Other People Crimes	0	0.00%	33.88%	38.16%	1	100.00%	38.76%	40.32%
Property Crimes	1	100.00%	41.89%	30.04%	0	0.00%	26.69%	35.72%
Fraud/Financial Crimes	0	0.00%	25.00%	17.98%	0	0.00%	26.15%	25.17%

Current and Reported	SPD	SPD	Prior Cities	Natl.	SPD	SPD	Prior Cities	Natl.
Case Closure Timelines	61-90	Pct.	61-90	Pct.	Over 90	Pct.	Over 90	Pct.
Serious People Crimes	0	0.00%	14.88%	11.68%	0	0.00%	21.76%	15.61%
Other People Crimes	0	0.00%	18.57%	14.61%	0	0.00%	8.79%	6.90%
Property Crimes	0	0.00%	19.93%	19.76%	0	0.00%	11.49%	14.48%
Fraud/Financial Crimes	1	100.00%	21.15%	27.39%	0	0.00%	27.69%	29.46%

Optimal	SPD	SPD	Prior Cities	Natl.	SPD	SPD	Prior Cities	Natl.
Case Closure Timeline	0-30	Pct.	0-30	Pct.	31-60	Pct.	31-60	Pct.
Serious People	1	100.00%	51.61%	52.02%	0	0.00%	31.50%	21.41%
Other People	1	100.00%	45.57%	37.78%	0	0.00%	50.75%	39.52%
Property Crimes	1	100.00%	38.67%	28.08%	0	0.00%	50.29%	40.00%
Fraud/Financial	0	0.00%	31.44%	17.16%	1	100.00%	39.38%	31.35%

Optimal	SPD	SPD	Prior Cities	Natl.	SPD	SPD	Prior Cities	Natl.
Case Closure Timeline	61-90	Pct.	61-90	Pct.	Over 90	Pct.	Over 90	Pct.
Serious People	0	0.00%	22.38%	12.47%	0	0.00%	19.38%	14.11%
Other People	0	0.00%	20.67%	15.35%	0	0.00%	7.54%	7.34%
Property Crimes	0	0.00%	26.87%	21.32%	0	0.00%	10.79%	10.60%
Fraud/Financial	0	0.00%	35.92%	27.84%	0	0.00%	21.24%	23.65%

\*Table includes data from prior studies conducted by the IACP.

Source: SPD Investigations Workforce Survey

## Investigations Staffing Summary

One element of this project involved an assessment of staffing within the investigation's unit. As stated previously, SPD has one investigator assigned to the Investigations Division. The investigator is supervised by a patrol sergeant who held the investigator's position prior to being promoted.

The sole investigator is a member of several teams made up of investigators from multiple agencies who respond to incidents throughout Clackamas County. Although this collateral duty takes time away from investigating cases that originate in Sandy BerryDunn notes that these task force style teams are important in the law enforcement culture and promote cross agency communication ultimately enhancing public safety operations throughout the area.

At SPD, the investigator has 38.16 hours per month to dedicate to each case. BerryDunn does not recommend additional staffing in the Investigations Division.

### 3.4 Investigations Operations

During discussions with SPD staff, BerryDunn learned the RMS of the SPD has the ability to track and monitor case assignments and progress for investigations through EFORCE. Generally speaking high-end misdemeanors and felony crimes are assigned to the investigator however, staff at SPD are not aware of specific criteria for assigning a case to an investigator.

Case assignment is handled by two sergeants. When a case is assigned, it will appear in the RMS dashboard of the investigator. Interviews with staff indicate an informal method of case monitoring, which does not clearly track case assignments, status, and updates. The investigator is responsible for keeping the sergeant apprised. Not using tracking cases consistently creates a condition where workloads, work effort, and case statuses are not clear, and the possibility of cases growing stale and/or not being updated or closed. BerryDunn recommends the SPD review its use of the RMS for tracking investigations and establish practices to consistently use it to document case assignments and reviews, and for identifying active versus suspended cases.

As noted above, the investigator is supervised by a patrol sergeant. First-line supervisors have many primary duties that can detract from their ability to supervise an investigator effectively and efficiently. BerryDunn recognizes that the lieutenant's position is currently vacant; however, when it is filled, BerryDunn recommends the lieutenant assume supervision of the investigator and take an active role in case management.


### Summary


The SPD Investigations Division is allocated one general investigator who is supervised by a patrol sergeant. The investigator has multiple collateral duties that take away from time spent investigating cases. Despite these collateral duties, the investigator is able to manage the current caseload. It is reported and likely that some cases that should or could be assigned to the Investigations Division are not based on the lack of capacity. It would benefit the SPD to


increase case assignments to investigations, as this would reduce the reliance on patrol staff to conduct secondary investigations, freeing them up to perform other functions.

## Recommendations

**Table 3.9: Section 3 Recommendations**

Investigations Services		
No.	Investigations Schedule	Overall Priority
<i>Section 3, Subsection I: Investigations Staffing</i>		
3-1	<b>Finding Area:</b> The current schedule for investigators is not optimized and does not provide for persistent investigator coverage during normal business hours.	
	<b>Recommendation:</b> The SPD should revise its schedule for their investigator so that the investigator is routinely scheduled during normal business hours Monday through Friday.	

Investigations Services		
No.	Case Management	Overall Priority
<i>Section 3, Subsection IV: Investigations Operations</i>		
3-2	<b>Finding Area:</b> The RMS of the SPD is able to track and monitor case assignments and progress for investigations. The SPD is not maximizing the use of its RMS to monitor case assignments, and there is a lack of formal case review and tracking of reviews.	
	<b>Recommendation:</b> The SPD should take steps to more appropriately use the RMS to track and monitor case assignments and progress by investigators. Periodic case reviews for all open cases should be conducted and documented, consistent with department standards on case updates and expected closure dates.	

Investigations Services		
No.	Investigations Supervision	Overall Priority
<i>Section 3, Subsection I: Investigations Staffing</i>		
3-3	<b>Finding Area:</b> The current supervisory structure of the Investigations Division is not optimal as patrol supervisors have several collateral duties.	
	<b>Recommendation:</b> BerryDunn recommends SPD assign the lieutenant as the supervisor of the investigator and take an active role in case management.	



## 4.0: Personnel and Hiring

*This section includes a review of agency practices related to recruiting, hiring, and retention of personnel.*

As the law enforcement profession currently faces great challenges, one critical element is garnering and maintaining public trust, which includes, in part, staffing policing agencies with officers who are representative of the communities they serve. Law enforcement departments across the United States have struggled with these issues traditionally, but there is mounting evidence that departments are facing even greater difficulty in their hiring practices today. As the 21<sup>st</sup> Century Policing Task Force Report noted:

*To build a police force capable of dealing with the complexity of the 21<sup>st</sup> century, it is imperative that agencies place value on both educational achievements and socialization skills when making hiring decisions. Hiring officers who reflect the community they serve is also important not only to external relations but also to increasing understanding within the agency. Agencies should look for character traits that support fairness, compassion, and cultural sensitivity.<sup>4</sup>*

The importance of attracting and hiring quality personnel is critical in today's law enforcement climate. Many police agencies contribute significant resources to their recruiting and hiring processes. This section outlines the processes in use by the SPD, and BerryDunn offers insights and recommendations from some of the more recent study work done on this subject.

As a part of this study, BerryDunn asked staff at the SPD to complete a recruiting survey designed to capture relevant data regarding recruiting, retention, selection, and hiring strategies. The survey, developed by the IACP, has been used to collect data from other agencies studied and from several agencies around the country that are demonstrating best practices in hiring. Throughout this section, BerryDunn references data from this survey, and in particular, how this data relates to the practices of the SPD.

### 4.1 Personnel Allocations and Diversity

In Table 4.1, the breakdown of the racial diversity within the SPD is provided, with these data also separated by rank. The sworn staff at the SPD are predominately white at 75%. The SPD has three Hispanic officers, one Hispanic sergeant, and one officer who identifies as Other Race, meaning they do not identify as Asian, African American, Hispanic, Native American, or white.

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<sup>4</sup> Final Report of The President's Task Force on 21<sup>st</sup> Century Policing – [http://www.cops.usdoj.gov/pdf/taskforce/taskforce\\_finalreport.pdf](http://www.cops.usdoj.gov/pdf/taskforce/taskforce_finalreport.pdf)

**Table 4.1: Diversity Profile – SPD**

Section	Race					
	Asian	African American	*Hispanic	Other	Native American	White
Executive (Chief, Assistant/Deputy Chief)	0	0	0	0	0	1
Mid-Rank (Below Chief – Above Sergeant)	0	0	0	0	0	0
Sergeants (All – Regardless of Assignment)	0	0	1	0	0	3
Patrol Officers (Excludes Supervisors Above)	0	0	3	0	0	5
Investigations (Excludes Supervisors Above)	0	0	0	0	0	1
<b>Other Sworn Personnel</b>						
SROs	0	0	0	1	0	1
<b>Non-Sworn Personnel</b>						
Community Services Officer	0	0	0	0	0	1
Records/Evidence Department	0	0	0	0	0	3
<b>Totals</b>	<b>0</b>	<b>0</b>	<b>4</b>	<b>1</b>	<b>0</b>	<b>15</b>
<b>Percentages</b>	<b>0.00%</b>	<b>0.00%</b>	<b>20.00%</b>	<b>5.00%</b>	<b>0.00%</b>	<b>75.00%</b>

\*Hispanic is not a race; Included here for diversity comparison purposes

Source: Agency Provided Data

The population in the City of Sandy is primarily white, at 83.67%. The largest non-white population in Sandy are those of multiple races, which comprise 9.18% of the community. As indicated above, building a diverse workforce is an important aspect of contemporary policing. Based on discussions with staff and in examining data for the SPD, there is a need and desire to continue to build diversity within the department. BerryDunn is aware that the SPD has been working on this issue and applauds those efforts.

BerryDunn has examined the diversity issue extensively, and Table 4.2 below provides aggregate data from seven prior studies. Within the same table, BerryDunn has included national data, based on police departments that provide services to communities with a population between 100,000 and 249,999 people. Although national data involves communities that are much larger than Sandy, this data provides some context regarding diversity percentages across a large portion of the policing industry.

**Table 4.2: Diversity Profile – Prior Study Comparisons**

Position	Asian	African American	Hispanic	Other	Native American	White
Command/Executive	2.20%	18.68%	0.00%	0.00%	0.00%	79.12%
Mid-Rank (Lt. and Below)	1.72%	13.98%	3.26%	0.00%	0.38%	80.65%
Police Officer*	1.32%	15.43%	5.80%	0.33%	0.21%	76.91%
Totals All Ranks	1.41%	15.28%	5.19%	0.26%	0.23%	77.62%
<b>**Prior Study Pct. Totals</b>	1.41%	15.28%	5.19%	0.26%	0.23%	77.62%

\*Includes all officers below Sergeant, which includes Detectives, Corporals, and Trainees.

<b>National Percentages</b>	<b>2.50%</b>	<b>12.30%</b>	<b>10.70%</b>	<b>0.30%</b>	<b>0.30%</b>	<b>73.90%</b>
<b>***Benchmark Cities Averages</b>	<b>2.51%</b>	<b>5.50%</b>	<b>0.00%</b>	<b>1.86%</b>	<b>0.00%</b>	<b>90.49%</b>

\*\*Table includes data from prior studies conducted by the IACP.

\*\*\*Hispanic is not a race and was separated from the Benchmark totals; row will not total to 100%

Source: <http://www.bjs.gov/content/pub/pdf/lpd13ppp.pdf>, <http://www.opkansas.org/maps-and-stats/benchmark-cities-survey/>

The percentages of diversity for the SPD are varied in comparison to Table 4.2. In some instances, they are higher, and in others, they are lower. Organizations should reflect the diversity makeup of the community they serve, and community demographics can vary greatly. Additionally, BerryDunn notes that although it is valuable for departments to reflect the communities they serve, staff diversity is not simply about hitting a mark or checking a box regarding a percentage. Achieving diversity is about building a workforce that understands the differences of people within the community, whether racial, ethnic, or cultural, and applying that understanding in practice.

Table 4.3 displays the gender profile of the SPD. It is common within the police industry for males to dominate the workforce, and at 80%, the percentage of males employed with the SPD is similar what BerryDunn has experienced in other studies. Still, it is important to recognize that the percentages reflected for the SPD involve small numbers, and even small changes could significantly affect the percentage totals. For example, if the SPD replaced one sworn position with a female officer, the percentage of female officers would shift from 20% to 31.25%. If two women were added, the percentage would jump to 37.50%.

**Table 4.3: Gender Profile – SPD**

Section	Gender	
	Male	Female
Executive (Chief, Assistant/Deputy Chief)	1	0
Mid-Rank (Below Chief – Above Sergeant)	0	0
Sergeants (All – Regardless of Assignment)	4	0
Patrol Officers (Excludes Supervisors Above)	7	1
Investigations (Excludes Supervisors Above)	1	0
<b>Other Sworn Personnel</b>		
SRO	2	0
<b>Non-Sworn Personnel</b>		
Community Services Officer	1	0
Records/Evidence Department	0	3
<b>Totals</b>	<b>16</b>	<b>4</b>
<b>Percentages</b>	<b>80.00%</b>	<b>20.00%</b>

Source: Agency Provided Data

Table 4.4 provides the gender breakdown by rank from several recent studies. Based on the data in Table 4.4 from several prior studies, the average number of males is 88.36%, while the number of women is 11.64%. Data from the benchmark cities studies is slightly more varied, with males at 87.51% and women at 12.49%.

**Table 4.4: Gender Profile – Prior Study Comparisons**

Position	Male	Female
Command/Executive	88.17%	11.83%
Mid-Rank	90.69%	9.31%
Police Officer*	87.84%	12.16%
<b>**Percentage</b>	<b>88.36%</b>	<b>11.64%</b>
<b>Benchmark Cities Avg.</b>	<b>87.51%</b>	<b>12.49%</b>

\*Includes all officers below sergeant, which includes detectives, corporals, and trainees.

\*\*Table includes data from prior studies conducted by the IACP.

Source: Prior Study Data

To provide additional context to the gender numbers provided in Table 4.4, in a 2016 study that examined best practices in recruiting and hiring, the top 10 agencies identified had an average of 80.78% male officers and 19.22% women. These numbers represent some of the best percentages in the law enforcement industry, yet even these top agencies have not achieved gender balance. So, as indicated, a small change for the SPD would place the department in a

better position than the comparisons and some of the most gender-balanced departments in the industry.

The SPD has four people of color in the department (Asian-American, Hispanic/Latino, and African American), and one individual is in a supervisory role. Again, the low numbers of people of color within the agency are likely a contributing factor. As indicated throughout this section, the SPD needs to continue to work on targeted recruiting, with a focus on building racial, ethnic, and gender equity throughout the agency.

It is also worth noting that BerryDunn did not study potential barriers to the hiring or advancement of minorities or women within the SPD ranks; however, the numbers reflected in this section suggest the need for the SPD to examine what issues might be contributing to the relatively low representation of women and minorities within the department.

It is important to add here that BerryDunn favors the hiring and promotion of quality candidates, regardless of gender, ethnicity, or other status. Traditionally, various groups of individuals have been underrepresented within the law enforcement industry, and there is significant evidence to show that improving organizational diversity benefits the department and the community. There is also evidence to suggest that when organizations focus their efforts on improving organizational diversity, they get results. Accordingly, the SPD should continue to focus on building diversity within the department and within the supervisory ranks.

## 4.2 Recruitment

Unlike many police organizations across the country, the SPD has not experienced a drop in applications over the last several years. In fact, SPD reports that applications have remained consistent. SPD currently engages in active and passive recruiting. Job openings are posted to sites such as, City of Sandy – Government Jobs, and SPD’s Facebook page. SPD engages in active recruiting through attending job fairs at colleges, career day events at the high schools and Chamber of Commerce events. One staff member manages a “Skills USA Law enforcement” group where he engages with high school students interested in pursuing a career in law enforcement.

## 4.3 Selection

In addition to reviewing the recruitment efforts of the SPD, BerryDunn also examined the hiring process for the department. At BerryDunn’s request, the SPD completed a survey related to several hiring aspects. The following list summarizes the applicable points:

- SPD does not use a written exam
- 10% of applicants pass the oral board process
- 50% pass the background process
- SPD does not use a pre-polygraph questionnaire
- SPD does not use a polygraph examination

In instances where a concern is raised during the background process that does not rise to the level of an automatic disqualifier, the background investigator will draft a report detailing their concerns based on several job-related factors including decision-making, attention to detail, moral character, work habits, and conscientiousness. This report is forwarded to the chief of police for review and a final employment decision.

## 4.4 Retention

For many United States police departments, and for the SPD, attrition presents an ongoing challenge in terms of maintaining adequate staffing. Based purely on statistics, the average separation rate for officers should be about 3.33%, assuming departments only lose people through retirement. As a practical matter, however, BerryDunn recognizes that the distribution of hiring is often not equal; not everyone stays for 30 years in the profession (or in one place), and some areas are more conducive to lateral transfers among officers. Accordingly, in most agencies, annual retirements usually fall below the average calculation rate. Of course, BerryDunn also knows that some officers in the department will leave for other reasons, which invariably increases the overall separation rate.

Determining what is a high separation rate is difficult, as a myriad of factors could affect officers leaving; however, data can be compared from other sources to assess the level of attrition in different agencies. In Table 4.5, the attrition rates from 10 recent studies are shown. These rates include all separations combined, including voluntary resignation, retirement, and discharge.

The overall range of attrition for these agencies was between 5.15% and 7.61%; the average rate was 6.26%. Table 4.5 also includes attrition data for the SPD. The average percentage of separations for the SPD is 10.53%. The rate of attrition for the SPD has fluctuated in recent years, going from 0.0% in 2019, to 6.67% in 2020, to 14.29% in 2021, and to 12.50% in 2022.

In looking at the attrition rates in Table 4.5, BerryDunn notes that the five-year voluntary resignation rate for the SPD is 5.26%. This number (5.26%) is about 1.92% higher than the comparisons, and the 2022 voluntary attrition rate for SPD was 6.25%, which is 1.92% higher than the comparisons. This number is potentially deceiving, however, because of the small number of officers within the SPD. For the SPD, a 12.50% attrition rate equates to 1.6 separations per year for the past four years, and while departments strive to retain personnel, it is an unavoidable aspect of doing business. While the percentages may appear significant, in context they are less concerning. Even though some attrition will occur, departments can reduce the likelihood of attrition by having an active strategy and plan. BerryDunn recommends that the SPD consider developing a formal retention plan in collaboration with City leaders.

**Table 4.5: Annual Separations and Comparison Data**

Reason	Year 1	Year 2	Year 3	Year 4	Average
Voluntary Resignation	2.39%	3.05%	3.65%	4.29%	3.34%
Retirement	1.92%	2.14%	1.87%	2.41%	2.09%
Discharged	0.84%	0.84%	0.74%	0.91%	0.83%
<b>Grand Total Percentages*</b>	<b>5.15%</b>	<b>6.04%</b>	<b>6.26%</b>	<b>7.61%</b>	<b>6.26%</b>
Sandy PD	2019	2020	2021	2022	Average
Voluntary Resignation	0.00%	0.00%	14.29%	6.25%	5.26%
Retirement	0.00%	6.67%	0.00%	0.00%	2.63%
Discharged	0.00%	0.00%	0.00%	6.25%	2.63%
<b>Grand Total Percentages**</b>	<b>0.00%</b>	<b>6.67%</b>	<b>14.29%</b>	<b>12.50%</b>	<b>10.53%</b>

\*Table includes data from prior studies conducted by the IACP.

\*\*Separation rates shown as a percentage of the current sworn workforce. Totals reflect all sworn separations, including recruits. Discharged includes medical (death) and forced separations.

Source: Agency Provided Data

## Summary

Unlike many U.S. police departments, SPD has not seen a decrease in applications from qualified candidates; however, given the recent separations from SPD, it is important they engage in active recruiting. A robust active recruiting program will assist SPD in realizing their goals of increasing diversity within their ranks and provide them the most qualified candidates.


It is important that the SPD focus significant effort on retention, as attrition is very costly both operationally and from a fiscal perspective, especially in a smaller agency like the SPD. SPD has already taken some steps to aide in their retention efforts. Of note, SPD has a take home vehicle program, shift differential, education incentives, and retention bonuses.

Arguably, some attrition will occur; however, if the SPD could positively affect the attrition rate, this could represent a substantial savings to the city, and reduce operational challenges that occur from losing personnel. For those reasons, BerryDunn notes that it is in the best interest of the SPD to have a firm understanding of what is causing the voluntary separations so that the SPD and the City can take additional steps to reduce these rates. To accomplish this, BerryDunn recommends that the SPD monitor any voluntary departures from the department, including any possible reasons cited. SPD should engage their staff in both exit interviews and stay interviews. Stay interviews can provide SPD executives with an understanding of factors impacting officers and improve communication at all levels of the department. Exit interviews can provide insight into an employee's decision to leave the organization. Understanding these issues may serve as a platform for the SPD to make changes to reduce future attrition.

## Recommendations

This section provides the one formal recommendations from this section, presented chronologically as they appear within the section. The recommendation table below includes the section and subsection, recommendation number and priority as assessed by BerryDunn, and details concerning the findings and recommendations.

**Table 4.6: Section 4 Recommendations**

PERSONNEL AND HIRING		
No.	Retention Plan	Overall Priority
<i>Section and Subsection:</i>		
4-1	<p><b>Finding Area:</b> The SPD has taken some steps to address their recent elevated attrition rates including a take home vehicle program, shift differential, education incentives, and retention bonuses. SPD has not developed a formal retention plan to work toward reduced attrition.</p>	
	<p><b>Recommendation:</b> SPD should develop a formal retention plan that leverages the talent and experience of the personnel within SPD. This program should include not only exit interviews but also stay interviews. Stay interviews are a valuable tool for supervisors and executives in determining the goals of employees while providing insights into the morale and general welfare of employees. Stay interviews also provide employees an opportunity to provide input on factors impacting the organization.</p> <p>BerryDunn has provided additional retention strategies in Appendix C.</p>	



## 5.0 Conclusions and Recommendations

### 5.1 Overall Summary

BerryDunn's analysis of the SPD suggests that leaders are consciously engaged in running the department in a progressive and positive manner, and that those within the organization, from command to line staff, take great pride in providing service to the public. Irrespective of the recommendations provided, BerryDunn found the SPD to be a full-service, community-oriented police agency that has worked hard to respond to increasing service demands, despite staffing challenges.

As BerryDunn expressed early in this report the SPD is engaging in many best practices and police department staff should be commended for their professionalism and the positive work of the organization.

Despite the positive aspects of the work environment observed at the SPD, there are opportunities for improvement, as the recommendations in this report suggest. The four most notable categories of recommendations involve:

- Staffing
- Patrol Schedule
- Technology
- Investigations, Case Management

Each of the nine recommendations in this report fall into one or more of these primary categories. BerryDunn notes that these categories are typical of such projects, and the number of formal recommendations in this report are one of the fewest BerryDunn has encountered.

One pressing need identified involves retaining personnel after they are hired. With a sworn staff of just 16, vacancies in the SPD will reduce efficiency and increase workloads.

As indicated in the beginning of this report, it was necessary for BerryDunn to freeze certain conditions to conduct this assessment; however, this does not mean that the SPD has been constrained from making various changes during this process. SPD staff have operated in a process of continuous improvement during this process. Accordingly, some of the recommendations made by BerryDunn have already been acted upon by the SPD, and some others are in queue.

It is BerryDunn's sincere hope that this report and the associated recommendations serve to provide positive guidance, and that this report is viewed as a valuable resource, not only for the SPD, but also for the government officials for the City of Sandy, who work together on behalf of the public to provide policing excellence for the community.

### 5.2 Staffing Summary

Based on the overall review of SPD staffing, BerryDunn concluded the following:

- The Records Division has sufficient allocated staff.
- The Patrol Division is not allocated sufficient staff. The SPD will benefit from adding three additional sworn staff members to the Patrol Division.
- BerryDunn recommends the lieutenant take an active role in investigations case assignment and management.
- The Investigations Division is sufficiently staffed with one investigator.

**Table 5.1: Authorized Sworn Hiring Level**


Description	Totals
Current Authorized Staffing Level	16
Additional Sworn Staffing	3
Minimum Operational Level	19
*Estimated Attrition Rate	1
Authorized Hiring Level	20

\*Estimated numbers


## Recommendations


This section provides the single formal recommendation from this section. The recommendation table below includes the section and subsection, recommendation number, and priority as assessed by BerryDunn and details concerning the findings and recommendations.


**Table 5.2: Section 5 Recommendations**


Conclusions and Recommendations		
No.	Optimal Staffing and Authorized Hiring Levels	Overall Priority
<b>Section 5, Subsection III: Staffing Summary</b>		
5-1	<p><b>Finding:</b> Authorized hiring levels at the SPD do not account for attrition rates. Hiring for officers at the SPD occurs when there are vacancies, and despite a recent increase in attrition, annual voluntary separations are generally knowable and predictable. Because of the lag time associated with hiring and providing initial training for officers, the SPD could find itself constantly working without its full complement of personnel.</p>	
	<p><b>Recommendation:</b> To maintain optimal staffing levels, hiring should occur at the rate of allocated personnel <i>plus</i> the anticipated attrition rate. In collaboration with City management, the SPD should establish a minimum operational level <i>and</i> a new authorized hiring level (consistent with the findings of this report) that helps ensure continuity of staffing.</p>	


## Appendix A: Findings and Recommendations


The Policing Environment		
No.	21 <sup>st</sup> Century Policing	Overall Priority
<i>Section I, Subsection VI: Contemporary Policing Practices</i>		
1-1	<b>Finding Area:</b> Although the SPD strives to exemplify the characteristics outlined in the 21 <sup>st</sup> Century Policing Task Force Report, there are several sections within the six main topic areas or “pillars” that may benefit from focused attention from the SPD.	
	<b>Recommendation:</b> The SPD should affirm its commitment to 21 <sup>st</sup> Century Policing and develop a process for pursuing, maintaining, and monitoring the department’s actions in pursuit of that goal.	


The Policing Environment		
No.	21 <sup>st</sup> Century Policing	Overall Priority
<i>Section I, Subsection VI: Contemporary Policing Practices</i>		
1-2	<b>Finding Area:</b> SPD stopped reporting UCR data to the FBI in 2014 and has not reported NIBRS data to the FBI.	
	<b>Recommendation:</b> NIBRS is an important tool for tracking crime trends nationally and on a regional and local level. SPD should commit to submitting NIBRS data to the FBI. BerryDunn notes that this is a stated goal of SPD’s.	


Patrol Services		
No.	Staffing	Overall Priority
<i>Section 2, Subsection I: Personnel and Deployment</i>		
2-1	<b>Finding Area:</b> SPD does not have sufficient patrol staff to efficiently meet the patrol workload or the needs of the community. The Sandy community values the police department and in turn expects officers to be present at community events, engaged in community policing and proactive policing strategies.	
	<b>Recommendation:</b> SPD should add three additional sworn staff members to the Patrol Division.	


Patrol Services		
No.	Solvability Factors	Overall Priority
<b>Section 2, Subsection VI: Patrol Operations</b>		
2-2	<p><b>Finding:</b> The SPD does not currently formally engage the use of solvability factors as an element of conducting a preliminary criminal investigation. The use of solvability factors helps increase the quality of preliminary investigations and can assist decision-makers in determining which cases should receive additional investigation.</p>	
	<p><b>Recommendation:</b> The SPD should require the use of solvability factors by all staff who conduct preliminary criminal investigations and complete the associated reports. Solvability factors should be reviewed by patrol supervisors as a part of the incident report approval process and used to assist with the case activation and assignment process.</p> <p>Solvability factors should include information such as whether there is a known suspect, whether there is a vehicle description, whether there are witnesses to the crime, and whether there is physical evidence. The sum of these factors comprises the baseline of a thorough preliminary investigation. If officers do not collect this information and report on it, one could reasonably assert that the preliminary investigation and/or the report was incomplete.</p> <p>By design, requiring patrol staff to collect and record this information helps to ensure a thorough preliminary investigation, and it can expedite the process of determining whether a case should be forwarded to a detective for additional investigation. It is possible, but unclear, whether the RMS at SPD has the capability to collect solvability factors. Regardless of that capability, BerryDunn recommends their collection as part of the preliminary investigation process.</p> <p>Additionally, BerryDunn recommends the SPD revise the report writing and approval process and include solvability factors as a required element within that process for all personnel generating criminal reports.</p>	

Investigations Services		
No.	Investigations Schedule	Overall Priority
<b>Section 3, Subsection I: Investigations Staffing</b>		
3-1	<p><b>Finding Area:</b> The current schedule for investigators is not optimized and does not provide for persistent investigator coverage during normal business hours.</p>	
	<p><b>Recommendation:</b> The SPD should revise its schedule for their investigator so that the investigator is routinely scheduled during normal business hours Monday through Friday.</p>	

Investigations Services		
No.	Case Management	Overall Priority
<b>Section 3, Subsection IV: Investigations Operations</b>		
3-2	<p><b>Finding Area:</b> The RMS of the SPD is able to track and monitor case assignments and progress for investigations. The SPD is not maximizing the use of its RMS to monitor case assignments, and there is a lack of formal case review and tracking of reviews.</p>	
	<p><b>Recommendation:</b> The SPD should take steps to more appropriately use the RMS to track and monitor case assignments and progress by investigators. Periodic case reviews for all open cases should be conducted and documented, consistent with department standards on case updates and expected closure dates.</p>	

Investigations Services		
No.	Investigations Supervision	Overall Priority
<b>Section 3, Subsection I: Investigations Staffing</b>		
3-3	<p><b>Finding Area:</b> The current supervisory structure of the Investigations Division is not optimal as patrol supervisors have several collateral duties.</p>	
	<p><b>Recommendation:</b> BerryDunn recommends SPD assign the lieutenant as the supervisor of the investigator and take an active role in case management.</p>	

PERSONNEL AND HIRING		
No.	Retention Plan	Overall Priority
<b>Section 4, Subsection 4: Retention</b>		
4-1	<p><b>Finding Area:</b> The SPD has taken some steps to address their recent elevated attrition rates including a take home vehicle program, shift differential, education incentives, and retention bonuses. SPD has not developed a formal retention plan to work toward reduced attrition.</p>	
	<p><b>Recommendation:</b> SPD should develop a formal retention plan that leverages the talent and experience of the personnel within SPD. This program should include not only exit interviews but also stay interviews. Stay interviews are a valuable tool for supervisors and executives in determining the goals of employees while providing insights into the morale and general welfare of employees. Stay interviews also provide employees an opportunity to provide input on factors impacting the organization.</p> <p>BerryDunn has provided additional retention strategies in Appendix C.</p>	

Conclusions and Recommendations		
No.	Optimal Staffing and Authorized Hiring Levels	Overall Priority
<b>Section 5, Subsection III: Staffing Summary</b>		
5-1	<p><b>Finding:</b> Authorized hiring levels at the SPD do not account for attrition rates. Hiring for officers at the SPD occurs when there are vacancies, and, despite a recent increase in attrition, annual voluntary separations are generally knowable and predictable. Because of the lag time associated with hiring and providing initial training for officers, the SPD could find itself constantly working without its full complement of personnel.</p>	
	<p><b>Recommendation:</b> To maintain optimal staffing levels, hiring should occur at the rate of allocated personnel <i>plus</i> the anticipated attrition rate. In collaboration with City management, the SPD should establish a minimum operational level <i>and</i> a new authorized hiring level (consistent with the findings of this report) that helps ensure continuity of staffing.</p>	

## Appendix B: List of Acronyms

**Appendix Table B.1: Acronyms**

Full Name	Acronym
American Community Survey	ACS
Bureau of Justice Statistics	BJS
Call for Service	CFS
City of Sandy	City
Clackamas County Jail	CCJ
Community Service Officer	CSO
Computer Aided Dispatch	CAD
Federal Bureau of Investigations	FBI
Fair Labor Standards Act	FLSA
Intelligence-Led-Policing	ILP
International Association of Chiefs of Police	IACP
Master Name Index	MNI
Sandy Police Department	SPD
National Incident-Based Reporting System	NIBRS
Records Management System	RMS
School Resource Officer	SRO
Uniform Crime Reports	UCR



## Appendix C: Recruiting and Retention

### Recruiting Strategies

The following information outlines several recommended practices that law enforcement agencies can engage to improve the effectiveness of their recruiting and hiring practices. For this information to have the best value, departments should evaluate their current practices against those listed here in consideration of the need for possible adjustments.

#### **Institute a continuous hiring program, or alternatively, a more frequent process that reduces lag time for applicants.**

In today's competitive environment, having open hiring processes only one or two times per year may not be sufficient. Qualified applicants who are eager to enter the profession may not be willing to wait for the next opening, and they may take their talents elsewhere. To guard against this, departments need to reduce the lag time between hiring processes. This could occur either through a continuous process, or through adding additional hiring cycles, if they are currently limited to a small number annually. Most modern hiring systems have the capability to accept applications on a continuous or more frequent basis, and this is preferred over hiring processes that occur sporadically.

While moving to an ongoing hiring process or increasing the frequency of the hiring process may be difficult from a logistics standpoint, the establishment of a more rapid or frequent process is essential to expanding the pool of quality applicants available to the department. In addition, once these candidates are identified, the department needs to act swiftly to secure their employment in advance of other opportunities they may have available.

Along with receiving continuous applications, law enforcement agencies should institute a written exam schedule that makes it more convenient for applicants, for example, on weekends or in the evening. This scheduling will provide candidates more flexibility and improve the numbers of candidates appearing for this part of the process.

#### **Implement a mentor program for new officer candidates**

Law enforcement candidates want to feel they are important and that the department values their application. The overall process can be daunting for many candidates, and they often have a sense of uncertainty throughout. Tending to their needs and answering their questions can provide applicants with a sense of care and belonging early in the process, which will reduce the likelihood that they will continue seeking employment elsewhere.

To meet these needs for candidates, departments should develop a cadre of carefully selected, highly motivated, and trained mentors to guide new recruits through the application process, and ultimately, their transition into law enforcement for the department. These mentors need to be selected based on their ability to train, guide, and empathize with new recruits. They should be assigned to priority candidates immediately after they are identified within the hiring process to help ensure that the candidate stays in the process and ultimately is hired.

#### **Establish an early hire program**

One method to overcome the negative impact that time has on the hiring process is to establish an early hire program. Once a candidate is fully qualified (successfully clears all the steps), the department should consider hiring him or her immediately, particularly if the start of the academy is not imminent. Today's candidates have oftentimes applied to multiple agencies, and although they may have a preference of which agency they want, they tend to go with the first job offer. By hiring candidates early, departments will keep quality candidates and not lose them to other agencies who may have faster processes. The early hire candidate can be brought on at a full or reduced salary rate and assigned to assistance-type work in non-sworn areas. While similar to a cadet program, these positions involve vacant officer slots rather than new positions, so they are effectively budget neutral or budget positive (depending upon the rate paid during the early hire period). Hiring these candidates early rather than waiting until sufficient numbers of applicants are hired to fill an academy class will help ensure a higher percentage of hires of quality applicants.

### **Provide a career fit tool, or day in the life training for applicants, to clarify work conditions and expectations**

In some cases, officer candidates have an unclear picture of what law enforcement work involves, and this can lead to lackluster performance, or candidates who choose to resign as they gain more understanding of what the job involves. To reduce this possibility, the department should include some type of unscored career fit tool at a very early stage of the process, describing real working conditions and tasks often performed. This could include things such as: a drunk person vomits in patrol car, trying to talk with an uncooperative witness, picking up the same person repeatedly for nuisance crimes. The candidates can then be asked about their willingness to do this kind of work. This would not be a scored tool, but it might help some applicants self-select out, as opposed to doing so after they are hired.

One way to orient candidates to the nature of the job is to create a video, similar to the IACPs Virtual Ride Along, which can be found on the Discover Policing website.<sup>5</sup> Again, the intent here is to help candidates understand the nature of the job as it truly exists within the department, as opposed to what they think it involves, based on information they might obtain from various sources.

### **Develop a brand that reflects the department commitment to the community, and its desire to protect and serve**

Having a strong brand can help create organizational pride, industry recognition, and enthusiasm for potential applicants. The brand should be concise, emotive, and simple, such as the longstanding slogan of the Marines: "The Few, The Proud" or Verizon's "Can you hear me now?" The brand should address community expectations and perceptions as well the reasons

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<sup>5</sup> [http://discoverpolicing.org/whats\\_like/?fa=virtual-ride-along](http://discoverpolicing.org/whats_like/?fa=virtual-ride-along)

officers have identified for choosing a career with department. Additionally, it should set the department apart from other law enforcement agencies.

Multiple tools are available to use in developing a brand, such as a mission statement, organizational values, and community expectations and perceptions. To assist with developing these tools, the department may wish to conduct a community survey to determine what the community expects from its law enforcement department and what qualities it desires in its officers. This survey can also be used to measure community perceptions. In addition, surveying first-line supervisors can be an effective way to identify what qualities the best officers of the department possess, and this can help inform the branding process.

### **Conduct an internal assessment of employee benefits and job conditions, to help ensure a competitive hiring environment**

The department should conduct an internal assessment of the benefits of working for the agency. Law enforcement leaders should ask themselves, and a core focus group of employees, what the department possesses that will attract the best possible officers. Effectively, the question to be answered is, “Why would I want to work for this department?” Conducting this inventory of benefits is a necessary first step in assessing what strategies will best succeed in attracting candidates. This inventory can also provide valuable tools to assist recruiters as well as potentially positively influencing turnover.

### **Establish a department philosophy that everyone is a recruiter**

Having a department-wide philosophy that emphasizes a recruitment potential in all public interactions can help overcome negative or unrealistic impressions of what law enforcement work entails and contribute to a larger strategic recruitment plan. Recruiting must become a part of everyday interactions between officers and the public. Establishing this mindset within the department to support recruitment can enhance community outreach efforts by making recruitment an overall philosophy for all rather than a task to be performed solely by a specialized unit.

### **Create an inviting atmosphere within the department for potential applicants**

Outreach to potential applicants must be meaningful, genuine, and reflect a departmental desire to build true relationships with them. Making these contacts real requires going beyond traditional public appearances, and might require imaginative or creative techniques, such as citizen academies, open houses, facility tours, and ride-alongs. To enhance the personal touch, the department should routinely schedule open houses at their various facilities. Additionally, every officer should be equipped with a business card that on the back, has the department’s brand as well as specific information on who to call to schedule a ride along. This personal touch and referral will go a long way in opening the department to new applicants, and it will solidify the commitment of the department to a proactive and ongoing recruitment strategy.

It is also important to note that when prospective candidates inquire about a ride along, the department should work to ensure that the officer assigned to the task is genuinely interested in serving the best interests of the agency through this process. This means that the department

should seek volunteers for these assignments and equip those officers with the information they need to help aspiring officers navigate their way through the hiring process.

### **Utilize youth outreach programs to enhance the department image and recruiting efforts**

The department should consider using youth outreach programs to enhance its recruiting and image among the youth of the community. These programs can range from a paid cadet/internship program to other less costly programs, such as an explorer program and/or partnership/mentor programs with local colleges and high schools. Because many high school students are already thinking about and starting preparation for future careers, high school age students should be a primary focus for long-term results. A series of youth leadership academies offered during the summer months, emphasizing self-discipline and core values, such as service to the community, can build a strong cadre of potential recruits and advocates in the community.

### **Use community liaisons for increased contact with underrepresented communities**

The department should use their community liaisons to spread the word about recruiting efforts. Recruiting notices should be placed in community-specific newspapers to include specific community and/or neighborhood newsletters. Department recruiting information and links should be on the web pages of professional, academic, and fraternal organizations throughout the city. The chief law enforcement executive and other members of the command staff should make direct appeals to community organizations for help in recruiting, especially from diverse communities.

A complaint that is often heard nationwide is that recruiting information is not getting to members of minority communities. By having a direct solicitation from members of the department command staff, the likelihood for better community communications increases significantly. The department should partner with community leaders and organizations to garner their support in referring applicants to the department. This partnership should include seeking a presence on the website of these organizations, as well as direct referrals to the department's recruiting website. The department should also consider holding separate recruiting meetings for members of specialty groups, including providing assistance and support in understanding the application and testing processes.

### **Develop a strategy to maximize opportunities with second-career applicants**

For many agencies, second-career applicants are a largely untapped market, and today's volatile economic situation has many people seeking career changes later in life. With the economic downturn of the late 2000s, many departments noted an increase in applicants seeking a second career in policing, coming from fields as diverse as automobile manufacturing, construction, marketing, and business administration. Second-career applicants present opportunities for departments to expand their workforce to include individuals with prior experience in diverse careers.

Career military personnel are also a logical source of second-career applicants. The department should establish partnerships with the local military installations to provide presentations to service members who are within two years of retirement. Many service members retire at a

young enough age that law enforcement is a viable choice as a second career. To maximize the potential for gaining the interest of these applicants, the department should make these connections and establish regular dialogue with military command personnel.

### **Expand personnel assigned to career days/job fairs, develop a recruiting speech**

In many law enforcement agencies, shortfalls in staff resources often affect critical areas, such as backgrounds, attendance at recruiting events, recruit testing, and other functions. While career fairs do not typically produce numerous applicants, they are an effective marketing tool for the department by providing the opportunity to boost departmental visibility and recruit targeting. To expand the recruiting pool of personnel, the department should assign selected patrol officers or selected staff from other units to attend these events. With a department-wide *everyone is a recruiter* philosophy; more events can be targeted. The department also needs to develop a specific recruitment information packet, or *recruiting speech*, that all personnel are familiar with and can use.

### **Establish an employee referral incentive program**

Employee referrals provide applicants with realistic and trustworthy answers to their questions, as well as a realistic portrayal of how a law enforcement career affects family life. Employee referral strategies will both increase applicant pools and provide balance to other recruitment strategies, such as online processes, that lack human interaction. To boost referrals, the department should establish an organization-wide recruitment/referral incentive program offering an incentive (monetary compensation or some other type of incentive, such as annual leave) for critical positions such as law enforcement officer. Human resources, along with appropriate government leadership, should identify critical positions where vacancies have a severe negative impact on services. Employees who recruit a qualified applicant would receive an incentive when the applicant is hired.

### **Develop a new more customer-friendly web page, and an enhanced social media presence for recruiting**

The department should examine and update their recruiting webpage, to emphasize ease of use and to provide more information, focusing on why a person should become an officer for the agency. Certainly, benefits, job security, and job challenges are important factors, but to have a successful strategy, the department must develop a brand for itself. Social media, such as Facebook and X formerly known as Twitter, should incorporate those changes as well as the new brand.

The new website should also incorporate various materials and information concerning the hiring and testing processes. If appropriate, this should include any areas or materials applicants should study to prepare themselves for the written exam. Ideally, those seeking information should be connected with a hiring mentor within the department to maximize the information provided to the candidate and to develop an early relationship between the applicant and the department.

### **Develop a recruitment video**

With the prevalence and popularity of online videos, such as on YouTube and other sites, effective recruiting videos are a requirement. Recruiting videos can be widely distributed and used by all members of the department to assist in recruiting and community engagement. Care should be taken to incorporate realistic information about job requirements, without over- or under-emphasizing the negative aspects of law enforcement work. There is little to be gained by attracting applicants who might have the necessary abilities and skills to become an officer but lack the interest or will to do all of the duties the job requires. Accordingly, the recruitment video should highlight the positive aspects of law enforcement work, without ignoring those elements that might be detractors, for some people.

### **Establish an effective and measurable yearly recruiting plan**

Just as with any law enforcement operation, successful planning is key to success. The department should develop and implement an effective and measurable yearly recruiting plan. This plan should identify specific goals/benchmarks, task assignments, and tools to use to achieve the goals. The plan should include accountability measures, and a senior commander should be responsible for implementation and plan success.

### **Prioritize top applicants, based on agency criteria**

In many departments, candidates are moved through the hiring process indiscriminately, without regard to their potential for successfully making it through the hiring process. In this sense, highly qualified candidates are treated the same as those who are clearly less qualified. Because of the competitive hiring market, this can lead to losing good candidates to other departments that act more swiftly, or who provide a greater level of focused attention to those candidates who are most likely to be hired.

The department should consider identifying a point within the hiring process at which they are able to distinguish those candidates the department would be most interested in hiring. Once this occurs, the department should assign them a mentor. In addition, the department should prioritize the background and other hiring processes for these applicants, to help ensure they remain highly engaged in the hiring process with the agency. This is not to say that the department should ignore or discard the other candidates. The idea here is to maximize the resources of the department with those who are the most likely to succeed. Focused attention should be afforded to as many applicants as the department can manage.

### **Reevaluate the disqualification factors (both singular and combination) to more holistically evaluate the attributes they and their community value**

It is important to note that while standards comprise an important part of a hiring process, certain steps, such as background investigations that impose unrealistic standards, can have a significantly negative effect on hiring the right people. Criteria that consider all criminal activity the same, regardless of type of offense or how recent the occurrence, or processes that screen out those who make voluntary admissions of drug use or other crimes (without any conviction), may impede an agency from hiring the diverse officers it needs for 21<sup>st</sup> century policing. The department should be aware of the potential for extenuating factors and reevaluate their disqualification factors (both singular and combination) to more holistically evaluate the



attributes they and their community want in their officers. This assessment should include evaluating the applicant's overall life experience and skills in a broader context.

As part of this process, the department should evaluate all discretionary disqualification factors in use to determine whether they represent the standards the department and community prefer. This exercise is not about reducing standards, but instead it is about clarifying which standards the department and community want to prioritize and maintain.

### **Establish a review committee to review questionable background information on candidates which are non-disqualifying in nature**

Some applicants have items in their history which may not immediately disqualify them as candidates but which, from a subjective view, may reflect poorly on the candidate overall. In the past, many departments have dismissed these applicants without further review or consideration. This can lead to the elimination of candidates who may have been a positive addition to the agency. The department should establish a secondary review committee to evaluate the details of any non-mandatory disqualification factors that may arise from the background investigation. This process could even involve an additional interview with the candidate. These processes often provide additional insight for the department about the candidate, and they can also provide an opportunity to provide feedback to the applicant.

Caution does need to be used to help ensure; that privacy laws are followed and with regard to the committee makeup, especially if non-department members are used. To help ensure compliance with these areas, the department should involve its labor attorney and human resources personnel at the outset of the development of this process, to establish a very clear and definitive policy on which cases will get a secondary review.

It is also important to note that it is likely impractical and counterproductive to offer to use this secondary review in every case. As a result, the department may wish to consider establishing specific standards for using secondary review. For example, secondary review might be restricted to cases that involve singular disqualification factors, as opposed to those that involve combination factors.

## **Retention Strategies**

The following information outlines several recommended practices that law enforcement agencies can engage to improve the effectiveness of their retention practices. For this information to have the best value, departments should evaluate their current practices against those listed here, in consideration of the need for possible adjustments.

### **Consider providing subsidies for city utilities for staff who live within the city**

Most cities provide utility services to residents, including electric, water, sewer, garbage, or other non-traditional services such as internet and cable. To incentivize staff to live within the community, and to create a retention incentive, the city could offer a monthly reduction on city utility expenses (e.g., \$100 per month).

### **Provide down payment assistance for purchasing a home**

For many new officers, purchasing a home can be a financial burden. One way to encourage new officers to live and stay within the community is to provide down payment assistance toward purchasing a new home. This can come in the form of a forgivable loan (e.g., \$10,000). As an example, the money is loaned to the officer interest and payment free, and for each year of service, 10% of the loan is forgiven. At the end of the ten-year period, the debt is eliminated. If the officer separates employment during that period, the remaining balance is owed to the city.

### **Consider tax incentives for staff who live within the city**

To incentivize staff to live within the community, and to create a retention incentive, the city could offer a level of tax exemption or rebate for staff who live in the community. This incentive could be established permanently for a limited term or on a declining scale over a specified period.

### **Create or expand educational incentives and tuition reimbursement plans**

Many cities have tuition reimbursement programs, however, most do not cover the full cost of education programs. The city could partner with area colleges and negotiate specialized rates, and establish full tuition reimbursement for certain degree tracks. In addition, the city could revise their compensation plans to include additional monthly salaries to staff, based on educational levels (e.g., associate's, bachelor's, or master's degrees).

### **Establish longevity pay at prescribed intervals**

For most cities, there is a prescribed pay scale for each position that has a specific cap. Once that cap is reached, staff can only expect cost of living adjustments. In addition, once staff reach the salary cap, pay among peers is equal regardless of whether one person has six years of experience and another has twenty. Adding longevity pay at specific intervals, (e.g., three- to five-year intervals following achieving the salary cap) recognizes the tenure of staff and helps them feel valued as their years of experience grow.

### **Adopt longevity-based prioritization for certain operational decisions**

Experienced officers want to feel that their tenure is recognized by the city and the department, and that it is valued in various decisions affecting them. The city should consider revising its practices to capture longevity as a factor in different operational decisions. Those areas could include the following:

- Overtime details
- Leave requests
- Shift selection, or beat assignments
- Vehicle assignments
- Voluntary training requests
- Promotions



- Specialty assignments

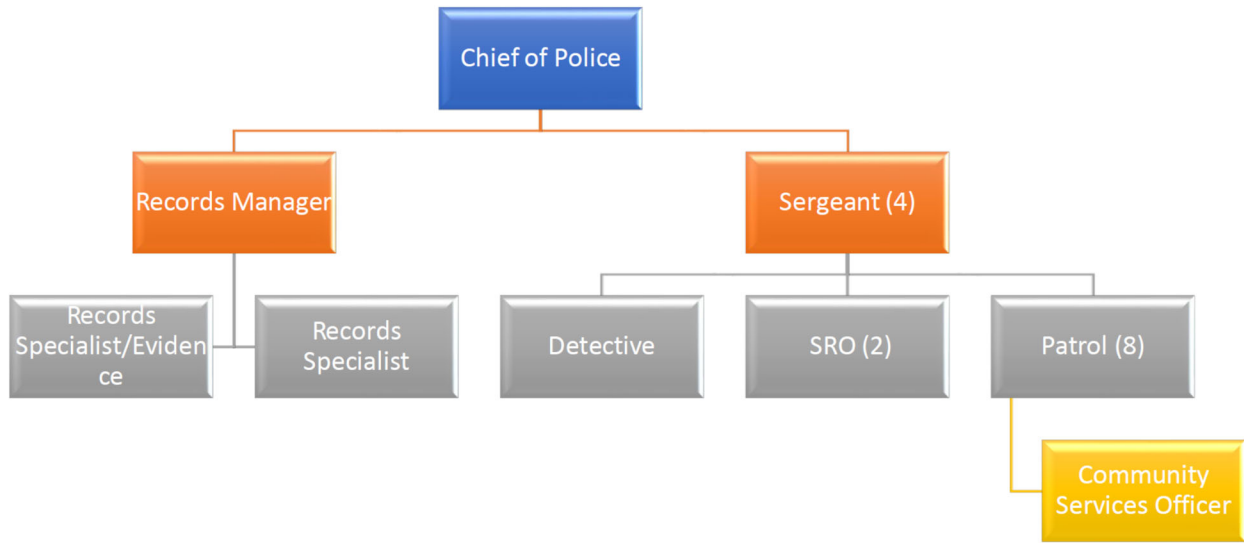
This list is not all-inclusive but provides a framework for understanding which areas might be added to longevity-based decision-making.

**Assign a permanent/long-term mentor to all new officers**

New officers have a desire to fit in, and they tend to have lots of questions. Many times, officers are reluctant to ask questions of their supervisors, or even their FTO, because they do not want to be viewed negatively. Mentors provide a safe haven for new officers to ask questions, and to develop a sense of comfort with their new surroundings. The right mentor can help a new officer understand the organizational culture and make them feel welcome and valued. These sentiments can contribute to an officer's job satisfaction, and their retention.

## Appendix D: Supplemental Tables and Figures

Sandy Police Department Organizational Chart



# SANDY OREGON

## Staffing and Key Operations Review City Council Presentation

# Agenda

Item # 3.

- ▲ Introduction
- ▲ Methodology
  - Patrol
  - Investigations
  - Other
- ▲ Key Recommendations
- ▲ Questions



- ▲ Methodology
  - Gather Data
    - CAD/RMS
    - Other Sources
- ▲ Analyze the Data
- ▲ Workload Model
  - 30 – 30 – 30 – 10



# Patrol Availability (Table 2.13)

This table reflects the cumulative average leave totals for patrol officers.

Annual Paid Hours	2080	*Study Averages
<b>Leave Category</b>		
Vacation	137	140
Illness/Sick	90	54
COMP Used	55	43
Holiday	65	75
Family Care	3	
Bereavement	11	
Training	131	76
<i>Subtotal (minus)</i>	492	
<b>Average Annual Availability (Hours)</b>	1,588	1,668



# Patrol and Supplemental Patrol Unit Hours (Table 2.2)

Patrol officers manage most of the workload.

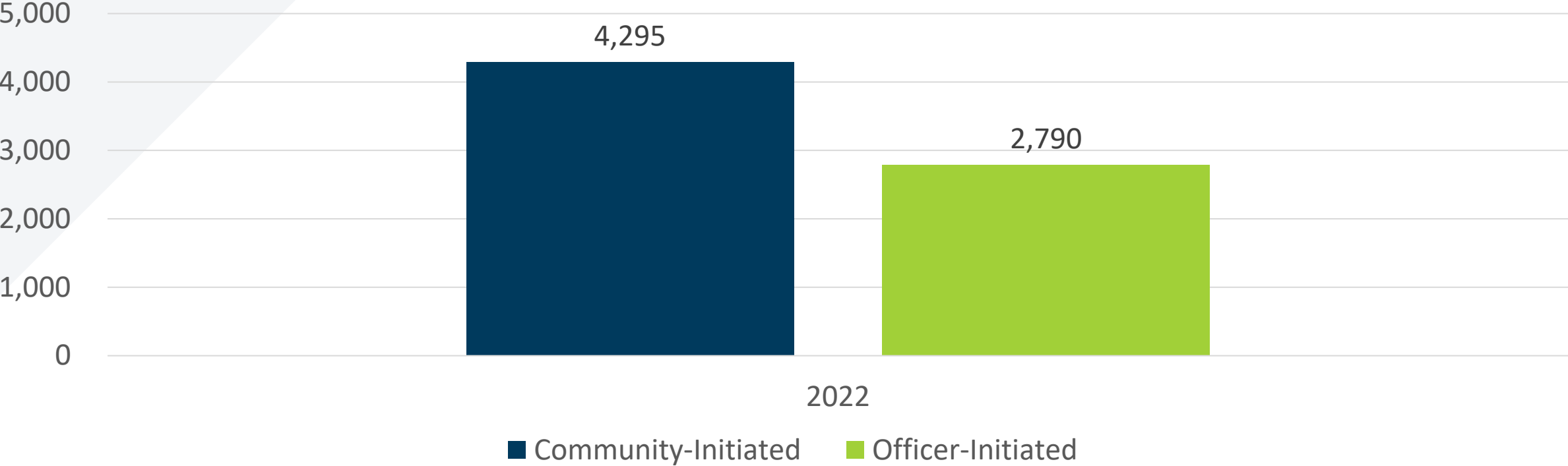
Supplanting hours are considered in the overall total.

<b>Patrol</b>	<b>Community</b>	<b>Officer</b>	<b>Unknown</b>	<b>Total</b>
Sandy Patrol	2445:43:59	2446:43:59	2447:43:59	2448:43:59
<b>Subtotal</b>	<b>2445:43:59</b>	<b>2446:43:59</b>	<b>2447:43:59</b>	<b>2448:43:59</b>
<b>Supplemental Patrol</b>	<b>Community</b>	<b>Officer</b>	<b>Unknown</b>	<b>Total</b>
Chief of Police	9:39:51	6:45:52	0:34:02	16:59:45
Sandy Lieutenant	87:59:20	26:37:22	0:05:47	114:42:29
Sandy Detective	28:46:50	48:28:11	0:16:47	77:31:48
Sandy Sergeant	264:34:08	113:36:42	0:46:35	378:57:25
School Resource Officer	207:41:11	177:42:04	0:46:52	386:10:07
Specialty Unit (SRO, Training, etc.)	34:04:48	26:55:36	5:24:03	66:24:27
Reserve Patrol Officer	8:01:43	35:51:00		43:52:43
Reserve Patrol Sergeant	1:04:34	2:42:15		3:46:49
<b>Subtotal</b>	<b>641:52:25</b>	<b>438:39:02</b>	<b>7:54:06</b>	<b>1088:25:33</b>
<b>Non-Patrol</b>	<b>Community</b>	<b>Officer</b>	<b>Unknown</b>	<b>Total</b>
Records Manager	3:37:06			3:37:06
Records Specialist	15:44:03	0:20:49		16:04:52
Code Enforcement (non-sworn)	220:34:24	61:36:57	1:41:44	283:53:05
<b>Subtotal</b>	<b>239:55:33</b>	<b>61:57:46</b>	<b>1:41:44</b>	<b>303:35:03</b>
<b>Sandy PD Total</b>	<b>3327:31:57</b>	<b>2947:20:47</b>	<b>2457:19:49</b>	<b>3840:44:35</b>



# Community vs. Officer-Initiated Activity (Figure 2.2)

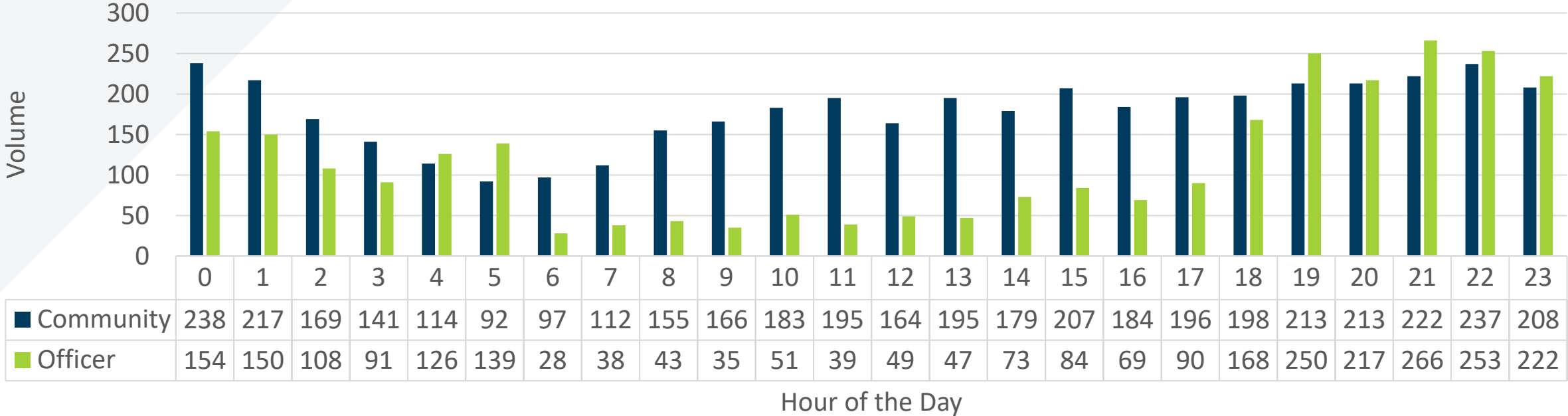
### Community vs. Officer Initiated Volume





# CFS by Hour (Figure 2.7)

CFS by Hour



Community Officer



# CFS Volumes by Hour (Table 2.19)

	Community		
Hour	CFS Total	Percent	
0700	138	2.77%	
0800	183	3.67%	
0900	211	4.23%	
1000	229	4.59%	
1100	243	4.87%	51.96%
1200	218	4.37%	
1300	254	5.09%	
1400	256	5.13%	
1500	285	5.71%	
1600	234	4.69%	
1700	241	4.83%	
1800	233	4.67%	
1900	241	4.83%	58.62%
2000	236	4.73%	
2100	242	4.85%	
2200	242	4.85%	
2300	219	4.39%	
0000	241	4.83%	
0100	218	4.37%	48.04%
0200	171	3.43%	
0300	143	2.87%	
0400	115	2.31%	
0500	95	1.90%	
0600	100	2.00%	
Total	4988	100.00%	

	Officer	
Activity	Percent	
43	1.42%	
48	1.58%	
43	1.42%	
57	1.88%	
52	1.71%	25.07%
57	1.88%	
56	1.85%	
87	2.87%	
103	3.39%	
83	2.73%	
103	3.39%	
189	6.23%	
266	8.76%	71.80%
249	8.20%	
288	9.49%	
269	8.86%	
235	7.74%	
156	5.14%	
151	4.98%	74.93%
108	3.56%	
92	3.03%	
128	4.22%	
143	4.71%	
29	0.96%	
3035	100.00%	

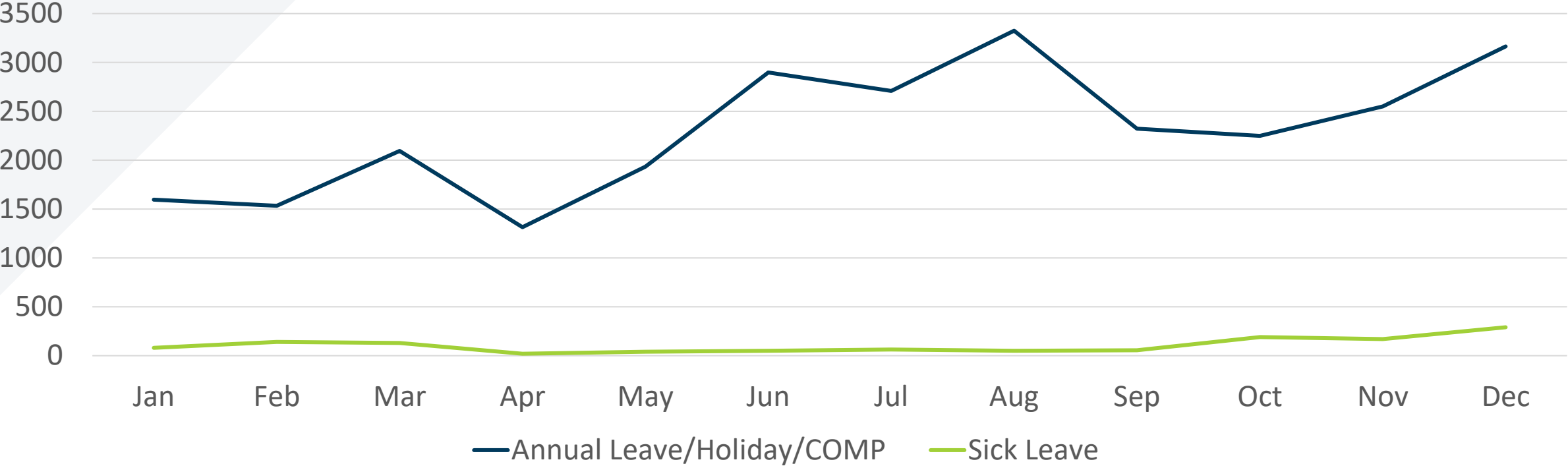
<b>0700 – 1500</b>	<b>34.72%</b>
<b>1500 – 2300</b>	<b>39.17%</b>
<b>2300 – 0700</b>	<b>26.10%</b>

Item # 3.



# Patrol Annual Leave Totals (Figure 2.5)

### Average Patrol Leave Usage



# Time Per CFS – Comparisons – 2022 (Table 2.5)

Sandy PD			
Category	% of Total Calls	% of Call Time	Minutes/CFS
Crime	20.91%	33.39%	58.15
Service	69.66%	59.94%	31.84
Traffic	9.43%	6.67%	24.57

*Prior Study Averages			
Category	% of Total Calls	% of Total Call Time	Minutes per CFS
Crime	38.87%	46.40%	57.02
Service	47.95%	40.19%	40.04
Traffic	13.18%	13.41%	48.61



# Shift Relief Factor Calculations (Table 2.16)

Shift Hours	Raw Shift Hours Total Annual	Shift Relief Factor	Number of Daily Shifts	Officers Required to Staff Minimums
12	4380	2.76	4	11



## Officers Required by Shift (Table 2.21)

Current Daily Events	0600 – 1800	1800 – 0600	Total	Shift Relief Factor	Total Officers
<b>Total Annual Hours</b>	1763.69	1314.82			
Minutes/Day	289.92	216.13			
Officers	1.34	1.00			
<b>Officers Required</b>	<b>2</b>	<b>1</b>	<b>3</b>	<b>2.76</b>	<b>8.28</b>

Current Daily Events	0600 – 1300	1300 – 0100	0100 – 0600	Total	Shift Relief Factor	Total Officers
<b>Total Annual Hours</b>	841.42	1950.94	286.14			
Minutes/Day	138.32	320.70	47.04			
Officers	0.64	1.48	0.22			
<b>Officers Required</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>4</b>	<b>2.76</b>	<b>11.04</b>

Staffing Needs	0600 – 1800	1300 – 0100	1800 – 0600	Total	Shift Relief Factor	Total Officers
<b>Recommended</b>	<b>2</b>	<b>*</b>	<b>2</b>	<b>4</b>	<b>2.76</b>	<b>11.04</b>



# Future Workload Projections (Table 2.22)

	Base Population	Base CFS Hours	Base Ratio CFS Hours per Person	Base Officer Hours	Base Officer 30% Hours	Staffing Patrol	Patrol % of Total Sworn
2022	12,953	3,079	0.24	1587.64	476.29	8	47.06%
2024	13,294	3,160				11	55.00%
2026	13,635	3,241				11	55.00%
2028	13,976	3,322				11	55.00%
2030	14,317	3,403				11	55.00%

	Base Invest.	Base Ratio Inv./Patrol	Staffing Invest.	Total Sworn	Non-Patrol Sworn*	Total Sworn Ratio to Population	Total Non-Sworn	Total Non-Sworn Ratio to Population
2022	1	0.13	1	16	8	809.56	3	4317.67
2024			1	19	8		3	
2026			1	19	8		3	
2028			1	19	8		3	
2030			1	19	8		3	



## ▲ Overall Recommendations

- Add three sworn positions to patrol
- Incorporate Solvability Factors





# Investigations

Item # 3.

## Methodology

- Caseloads
- Personnel Data
- Interviews
- Observations
- Survey



# Investigations Availability (Table 3.2)

This table reflects the cumulative average leave totals for investigators.

<b>Annual Paid Hours</b>	<b>2080</b>	<b>*Study Averages</b>
<b>Leave Category</b>	<b>Hours</b>	<b>Hours</b>
Annual Leave	164.5	162.03
Holiday	8	39.91
Sick Leave	67	20.29
Military Leave		50.93
Workers Compensation/Injury		7.02
Compensatory Time	24.75	12.42
Other (Includes FMLA and Funeral)		
Training	175.00	80.74
<i>Subtotal (minus)</i>	439.25	
<b>Average Annual Availability (Hours)</b>	<b>1640.75</b>	<b>1,700</b>



# Cases Assigned by Type and Year (Table 3.3)

Assignments by Unit*	2021	2022	Two-Year Avg.	% Change
Investigations Unit	43	37	40	-13.95%
<b>Totals</b>	43	37	40	-13.95%

# Average Annual Caseloads Per Detective (Table 3.5)

Investigative Capacity	*Cases Assigned	**Number of Detectives	Annual Cases per Detective	Monthly Average per Detective	Average Available Hours per Year	Average Hours Available per Month	Average Hours Available per Case
Investigations Unit	43	1	43	4	1640.75	136.73	38.16



## Overall Recommendations

- No staffing addition is being recommended
- Adjust investigations schedule to staff traditional business hours
- Assign lieutenant to supervise the investigations function

# Authorized Sworn Hiring Level (Table 5.1)

Description	Totals
Current Authorized Staffing Level	16
Additional Sworn Staffing	3
Minimum Operational Level	19
*Estimated Attrition Rate	1
Authorized Hiring Level	20



# Sworn Staffing Summary

- The Records Division has sufficient allocated staff.
- The Patrol Division is not allocated sufficient staff. The SPD will benefit from adding three additional sworn staff members to the Patrol Division.
- Anticipated City growth over the next 10 years would not be expected to require additional staff beyond BerryDunn's recommendations.
- BerryDunn recommends the lieutenant take an active role in investigations case assignment and management.
- The Investigations Division is sufficiently staffed with one investigator.



# Questions and Further Discussion

## **Michele Weinzetl**

Senior Manager: Consulting Team

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# STAFF REPORT

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**Meeting Type:** City Council  
**Meeting Date:** October 7, 2024  
**From:** Kelly O’Neill Jr., Development Services Director  
Anais Mathez, Project Manager for 3J Consulting  
**Subject:** PUBLIC HEARING - Ordinance 2024-18: Envision Sandy 2050 Adoption

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**DECISION TO BE MADE:**

Hold a legislative public hearing for the adoption of Envision Sandy 2050.

**PURPOSE / OBJECTIVE:**

The Sandy Comprehensive Plan is a legislative regulatory guidebook intended to regulate development and guide growth for the city of Sandy. The purpose of this legislative public hearing is to gather input from the public and consider adoption of Envision Sandy 2050 which will replace the Sandy Comprehensive Plan that was adopted in 1997.

**BACKGROUND / CONTEXT:**

On February 20, 2020, the City Council adopted a Council goal to initiate an update of the City's Comprehensive Plan. This goal included a plan to review options and approve an implementation strategy to update the Comprehensive Plan. Over the following year, staff worked on identifying a schedule, forming a budget, applying for grants, and other miscellaneous tasks associated with initiating an update to the Comprehensive Plan. On March 8, 2021, the City Council adopted a Council goal to begin the update of the City's Comprehensive Plan and provided the Development Services Department with supplemental funds to hire a consultant.

Over the following year, staff received a technical assistance grant, executed a request for qualification process, and came to an agreement on a scope of work and budget with 3J Consulting. On March 7, 2022, the City of Sandy officially launched “Envision Sandy 2050,” by holding the kickoff meeting with 3J Consulting.

Over the course of the past few years, City staff and volunteers (including the Planning Commission and City Council), with assistance from 3J Consulting, embarked on a public process to completely update the Comprehensive Plan. City staff and 3J Consulting led outreach and engagement efforts to better understand the community’s vision and priorities related to Sandy’s future. The Envision Sandy 2050 process touched more than 1,000 community members through Community Conversations, community events, online surveys, and the Sandy Speaks webpage. Activities were designed to identify common themes around the aspirations and concerns of a community, which were a key piece to the development of the community-wide Vision Statement for the Comprehensive Plan.



As a reminder, the City of Sandy received a Technical Assistance Grant from the Department of Land Conservation and Development (DLCD) for \$50,000. The grant helped fund the updates to the City's Comprehensive Plan. The City applied some of the grant money to contract with ECONorthwest, a planning and economics consultant firm, to develop a Housing Capacity Analysis (HCA) and an Economic Opportunities Analysis (EOA). These two documents were adopted in April of 2024 and provide a factual basis for some of the goals and polices in Envision Sandy 2050.

Since the last work session on May 20, 2024, the Envision Sandy 2050 document was modified to address the majority of the concerns raised by Councilor Hokanson. Then, on August 26, 2024, the Planning Commission held a public hearing. The Commission provided staff and 3J Consulting with a number of edits. These were the edits:

- Page 2 – Change 'Jan Weinberg' to 'Jan Lee.'
- Page 5 – The second paragraph has a huge white space after the word 'ultimately.'
- Page 22 – Describe the building that Ludwig Hoffman constructed in the 1919 note.
- Page 25 – Modify the 2008 note to be 2009 and state 15 years instead of 'last few decades.'
- Page 28 – In 'Commuting Flows' change the word 'lived' to 'live.' Make the tense the same with the sentence afterwards.
- Page 31 – Remove the word 'a' in the first sentence of the second paragraph.
- Page 50 – Remove the extra space after the word 'parcels' in the first bullet point.
- Page 51 – Capitalize the event name 'SOLVE.'
- Page 52 – Change AntFarm Youth Services to describe AntFarm as a nonprofit organization that provides work skills for youth.
- Page 56 – Change to City departments in the 'Open Data and Civic Technology' paragraph.
- Page 65 – Modify the last sentence of the first paragraph, bullet point gunlocks and firearms, and remove extra space in 'helmet program.'
- Page 67 – Make 'street's' possessive in the last sentence on the page.
- Page 73 – Add hyphen between 'well and connected' in Policy 4.1.
- Page 78 – Add the term 'natural disasters' in Policy 13.8.
- Page 78 – Modify Policy 13.9 to state the United States Forest Service.
- Page 95 – Change the sentence in the 2022 Parks and Trails Master Plan section to be past tense. "This plan was revised and readopted in 2022."
- Page 105 – Add 'Clackamas' before Soil and Water Conservation District in Policy 26.3.
- Page 120 – There is a missing parenthesis on the last paragraph after '2019.'

In addition to the above edits, the final document presented with Ordinance No. 2024-18 includes full incorporation of all goal and policy edits from the feedback that staff and the consultants received from the City Council and the Planning Commission over the course of several work sessions. After over two years of data collection, holding multiple joint City Council and Planning Commission Work Sessions, diligently editing the policies in the City's six vision statements, and making edits to the document as requested by Councilor Hokanson and the Planning Commission, the Comprehensive Plan ultimately coalesced into a final draft that is presented as Exhibit B.

#### **KEY CONSIDERATIONS / ANALYSIS:**

1. Notice was provided to the Department of Land Conservation and Development (DLCD) on July 19, 2024. No official comments were received from any state or federal agency. It should be noted that staff did receive input from DLCD on earlier drafts of the comprehensive plan and as

discussed at past work sessions with the City Council, integrated some of the input from DLGD into Envision Sandy 2050.

2. Oregon Revised Statutes (ORS) 197.175(2) requires cities and counties to prepare, adopt, amend, and revise comprehensive plans in compliance with the statewide planning goals.
3. The Sandy Municipal Code (SMC) Chapter 17.24 provides the criteria for Type IV Comprehensive Plan legislative amendments. The recommendation by the Planning Commission and the decision by the City Council shall be based on consideration of the findings explained in Exhibit A.
4. As described in detail in Exhibit A, the Comprehensive Plan update is consistent with the City's adopted Housing Capacity Analysis (HCA), Economic Opportunities Analysis (EOA), Transportation System Plan (TSP), 2022 Parks and Trails Master Plan, and all applicable state and regional regulations.
5. No Comprehensive Plan Map designations have been amended at this time. However, the symbols representing existing and future City Parks and primary and secondary schools have been removed. This was done as the symbol locations did not correspond with, or are in direct conflict with, future locations outlined in the Oregon Trail School District Facility Plan and the City's Parks and Trails System Master Plan.
6. There are a total of nineteen statewide planning goals identified in Oregon Administrative Rules (OAR) under Chapter 660, Division 18. Of these goals, twelve are applicable to Sandy, which include: Citizen Involvement (Goal 1), Land Use Planning (Goal 2), Natural Resources (Goal 5), Air, Water & Land Resource Quality (Goal 6), Natural Hazards (Goal 7), Recreational Needs (Goal 8), Economic Development (Goal 9), Housing (10), Public Facilities & Services (Goal 11), Transportation (12), Energy Conservation (13) and Urbanization (14). The attached findings (Exhibit A) demonstrate how the draft Comprehensive Plan document complies with each of the above-listed statewide planning goals.

#### **BUDGET IMPACT:**

Staff and the consultant can make additional modifications, but the budget for this project has been used. Additional modifications will result in a change order to the contract.

#### **RECOMMENDATION:**

The Planning Commission finds that the findings (Exhibit A) and the proposed Envision Sandy 2050 Comprehensive Plan Amendment (Exhibit B) satisfy all applicable criteria of the City's Development Code for plan amendments and all applicable state and regional criteria. At a public hearing on August 26, 2024, the Planning Commission recommended that the City Council adopt the proposed Comprehensive Plan Amendment.

#### **SUGGESTED MOTION LANGUAGE:**

"I move to approve the first reading of Ordinance 2024-18."

#### **LIST OF ATTACHMENTS / EXHIBITS:**

Ordinance No. 2024-18

- Exhibit A. Findings for Comprehensive Plan Adoption

- Exhibit B. Envision Sandy 2050 Comprehensive Plan and Appendix



## ORDINANCE NO. 2024-18

### **AN ORDINANCE ADOPTING AN UPDATED SANDY COMPREHENSIVE PLAN**

**WHEREAS**, on March 18, 1974, the City Council passed Resolution No. 5-74 adopting Sandy's first Comprehensive Plan; and

**WHEREAS**, the land use goals and policies in the Sandy Comprehensive Plan were last fully updated in 1997 by Ordinance 8-97 and have been amended in a piecemeal manner many times since; and

**WHEREAS**, on February 4, 2019, the City Council adopted their goals for 2019 which included the initiation of an update to the City's Comprehensive Plan required by Chapter 17.24 – Comprehensive Plan Amendment Procedures; and

**WHEREAS**, pursuant to the City Council initiation, Developmental Services implemented the strategy and launched the Envision Sandy 2050 Comprehensive Plan project, a city-wide community engagement process that outlined a desired future for the community as one of the initial steps in updating the Comprehensive Plan; and

**WHEREAS**, the City has now prepared a proposed major text amendment to the Sandy Comprehensive Plan, in the form of a new updated comprehensive plan (the "Envision Sandy 2050 Comprehensive Plan") which would replace the existing comprehensive plan in its entirety, establishing land use goals and policies informed by extensive public outreach and supported by background reports and technical research and analysis; and

**WHEREAS**, the process for adoption of the updated Sandy Comprehensive Plan requires consideration and a public hearing by the Planning Commission; and

**WHEREAS**, the Planning Commission held a public hearing on the proposed Comprehensive Plan on August 26, 2024; and after review and consideration of public testimony, the Planning Commission recommended City Council approval of the Envision Sandy 2050 Comprehensive Plan; and

**WHEREAS**, on October 7, 2024, the City Council held a public hearing to receive additional public testimony on the proposed Envision Sandy 2050 Comprehensive Plan; and

**WHEREAS**, at the close of the public hearing, the Council gave due consideration to the Planning Commission recommendation and all testimony received, and hereby adopts the findings of the Planning Commission attached hereto as Exhibit A as their own in regard to this matter.

### **NOW, THEREFORE, THE CITY OF SANDY ORDAINS AS FOLLOWS:**

**Section 1:** After full and due consideration of the application, the Planning Commission recommendation, the record, and evidence presented at the public hearings, the City Council adopts the findings of fact contained in the Planning Commission recommendation, which is included as Exhibit A to this Ordinance.

**Section 2:** The proposed Envision Sandy 2050 Comprehensive Plan in Exhibit B, attached to this Ordinance, is hereby approved.

**Section 3:** This Ordinance shall become effective 30 days from its adoption.

This ordinance is adopted by the City Council of the City of Sandy this 7th day of October, 2024.

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Stan Pulliam, Mayor

ATTEST:

\_\_\_\_\_  
Jeffrey Aprati, City Recorder

## **Ordinance 2024-18 Findings for Comprehensive Plan Adoption**

The proposed Envision Sandy 2050 Comprehensive Plan (Exhibit B) will add, modify, delete, and retain the goals, policies, and objectives identified in the 1997 Sandy Comprehensive Plan, as amended through April 2018. The proposed legislative amendments encompass all six (6) chapters of the Envision Sandy 2050 Vision Statements and Vision Themes. The Envision Sandy 2050 Vision Statement provides a framework for the Comprehensive Plan and each chapter of the Comprehensive Plan is organized by the thematic areas of the vision. The organization of Envision Sandy 2050 Vision Themes correlate with the titles of applicable statewide planning goals (pages 44-46 of Exhibit B). The following code sections address the legislative initiation, the review criteria, the notification process, and the findings.

### **Sandy Municipal Code Chapter 17.24, *Comprehensive Plan Amendment Procedures***

The adopted Comprehensive Plan is the official statement of the City that sets forth major policies concerning desired future development of the community. The Comprehensive Plan is the controlling land use planning instrument for the City, and as such land development regulations and related actions are required to conform to the plan.

The City must demonstrate that the Plan is consistent with applicable state, regional, and local policies, rules, and regulations to adopt the proposed Plan. The following findings relate to compliance with all applicable criteria.

#### **Sec. 17.24.20. Initiation.**

Comprehensive Plan amendments may be initiated by one of the following:

- A. An application submitted by a property's owners or their authorized agents for a specific property; or
- B. A majority vote of the City Council.

***Findings:*** The City of Sandy City Council proposed a major amendment to the Sandy Comprehensive Plan that will completely replace the current Plan adopted by Ordinance 8-97 in its entirety, with updated goals and policies. The Sandy City Council initiated this major Comprehensive Plan amendment by a majority vote in their goal setting sessions for the 2019-2021 biennium, recognizing that the existing Plan was outdated. Based on the initiation above to adopt a new updated Comprehensive Plan by City Council, this criterion is satisfied.

#### **Section 17.24.70. Review criteria.**

Comprehensive Plan amendments shall be reviewed to assure consistency with the purposes of this chapter, policies of the Comprehensive Plan, and any other applicable policies and standards

adopted by the City Council. Amendments shall be approved only when the following findings are made:

- A. The change being proposed is the best means of meeting the identified public need; and

**Findings:** While the City of Sandy's Comprehensive Plan has undergone several incremental changes, it has not been fully updated since 1997. The City Council recognized there is a community need to update the Comprehensive Plan predicated on the amount of commercial and residential development, increasing the population from 5,000 residents in 1997 to over 13,000 residents in 2024, and that the extent of changes in the community since 1997 necessitated a complete overhaul of the comprehensive plan rather than more incremental amendments to the existing plan. The proposed Envision Sandy 2050 Comprehensive Plan was drafted based on the public needs identified during an extensive community involvement process. Additionally, the Envision Sandy 2050 Comprehensive Plan is consistent with the City's most recent adopted Housing Capacity Analysis (HCA), Economic Opportunity Analysis (EOA), Parks and Trails Master Plan, Water Master Plan, and the Transportation System Plan (TSP). The new Comprehensive Plan will meet the intent of all applicable state and regional regulations. This criterion is satisfied.

- B. The change conforms to all applicable Oregon Statewide Land Use Planning Goals.

**Findings:** There are a total of nineteen statewide planning goals identified in Oregon Administrative Rules (OAR) under Chapter 660, Division 18. Of these goals, twelve are applicable to Sandy, which include: *Citizen Involvement* (Goal 1), *Land Use Planning* (Goal 2), *Natural Resources* (Goal 5), *Air, Water & Land Resource Quality* (Goal 6), *Natural Hazards* (Goal 7), *Recreational Needs* (Goal 8), *Economic Development* (Goal 9), *Housing* (10), *Public Facilities & Services* (Goal 11), *Transportation* (12), *Energy Conservation* (13), and *Urbanization* (14).

### **Goal 1: Citizen Involvement**

It is the purpose of this Goal to develop a citizen involvement program that ensures the opportunity for citizens to be involved in all phases of the planning process.

**Response:** Over the course of nearly two years, City staff and the consultant led outreach and engagement efforts to better understand the community's vision and priorities related to Sandy's future. The Envision Sandy 2050 process touched more than 1,000 community members through Community Conversations, community events, online surveys, and the Sandy Speaks webpage.

The application is being reviewed through a Type IV process that requires two public hearings. A legal notice was published in the Sandy Post and a notice of the proposal was sent to the Department of Land Conservation and Development (DLCD). The Planning Commission reviewed the application at a public hearing on August 26, 2024, and made a recommendation to the City Council who held a public hearing on October 7, 2024.

**Finding:** Because the public had the opportunity to review and comment on the application, the proposal and process the City took meets the requirements of Goal 1.

### **Goal 2: Land Use**

It is the purpose of this Goal to establish a land use planning process and policy framework as a basis for all decisions and actions related to the use of land and to assure an adequate factual base for such decisions and actions.

**Response:** As described in further detail above and below, the process used to adopt the 2050 Comprehensive Plan is in conformance with Chapter 17.24 Comprehensive Plan Amendment Procedures. Sandy's goals and policies related to Oregon Statewide Land Use Planning Goal 2, Land Use Planning, can be found in the Governance and Growth Management Vision Theme section of the 2050 Comprehensive Plan.

Through the update process, various documents that form the City's factual base include: the City's Housing Capacity Analysis (HCA), the Economic Opportunity Analysis (EOA), the Transportation System Plan (TSP), the Parks and Trails System Master Plan, and others. Key findings from these documents have been integrated into the policies in the Plan, specifically into the themes.

The Comprehensive Plan Map includes land use designations establishing the intended urban pattern and the general use and intensity of development, as well as land use boundaries illustrating the Urban Growth Boundary (UGB), city limits, and specific area plans. The Comprehensive Plan Map plays a key role in maintaining and updating the City's Zoning Map with corresponding land use designations.

No Comprehensive Plan Map designations have been amended at this time. However, the symbols representing existing and future City Parks and primary and secondary schools have been removed. This was done as the symbol locations did not correspond with or are in direct conflict with future locations outlined in the Oregon Trail School District Facility Plan and the City's Parks and Trails System Master Plan.

**Finding:** The proposed Comprehensive Plan update complies with statewide land use Goal 2.

### **Goal 5: Natural Resources, Scenic and Historic Areas, and Open Spaces**

It is the purpose of this Goal to protect natural resources and conserve scenic and historic areas and open spaces.

**Response:** Sandy's goals and policies related to Oregon Statewide Land Use Planning Goal 5, Natural Resources, Scenic and Historic Areas, can be found in the Community and Culture Vision Theme and the Parks, Trails, and Natural Resources Vision Theme section of the 2050 Comprehensive Plan.



The goals and policies of the new plan continue to support inventory and protection of natural resources and wildlife habitat by maintaining the Flood, Slope, and Hazard (FSH) overlay district. The City continues to follow the existing state and federal programs in place to govern these particular natural resources. In some cases, compliance with the state and/or federal program is sufficient to comply with Goal 5 for that resource.

Sandy's goals and policies and multiple chapters in the Sandy Municipal Code support the conservation and replenishment of areas that have significant ecological, aesthetic, and economic benefits of urban forests, by regulating tree removal on properties greater than one acre within the Sandy Urban Growth Boundary. The City of Sandy further recognizes the aesthetic and economic value of landscaping and encourages its use to establish a pleasant community character, unify developments, and buffer or screen unsightly features. The City desires and intends all properties to be landscaped and maintained.

The City is proud of its history and heritage and for the first time within a comprehensive plan included a chronological display of historical events. The City also supports the Sandy Historical Museum which was constructed in 2007. The museum is the key to preserving Sandy's history through artifact and information collection.

**Finding:** The proposed Comprehensive Plan update complies with statewide land use Goal 5.

### **Goal 6: Air, Water, and Land Resources Quality**

It is the purpose of this Goal to maintain and improve the quality of the air, water, and land resources of the state.

**Response:** Sandy's goals and policies related to Oregon Statewide Land Use Planning Goal 6, Air, Water, and Land Resources Quality can be found in the Natural Hazards and Resiliency Vision Theme section of the 2050 Comprehensive Plan.

The updated 2050 Comprehensive Plan includes goals, policies, and objectives aimed at maintaining and improving the quality of the air, water, and land resources of the city. The City refers to existing data sources pertaining to air, water, and resource quality compiled by known government agencies (e.g., United States Environmental Protection Agency) and enforces them when applicable.

Goal 6 requires cities and counties to ensure that solid waste, thermal, noise, atmospheric, or water pollutant and contaminant process discharges from existing and future developments do not violate state or federal environmental quality standards or degrade the quality of air, water, or land resources. The Oregon Department of Environmental Quality (DEQ) regulates air, water, and land with CWA Section 401 Water Quality, Water Quality Certificate, State 303(d) listed waters, Hazardous Wastes, Clean Air Act (CAA), and Section 402 NPDES Construction and Stormwater permits. DEQ regulates

sanitary sewer systems through Water Pollution Control Facilities Permits, solid waste facilities through Solid Waste Disposal Site Permits, and air quality through Air Contaminant Discharge Permits.

Goal 6 is upheld through grading and stormwater management standards that regulate impervious surface and stormwater runoff throughout the city.

**Finding:** Based on the response above, the proposed draft policies are consistent with statewide land use Goal 6 for Air, Water, and Land Resources Quality.

### **Goal 7: Areas subject to Natural Hazards**

It is the purpose of this Goal to protect people and property from natural hazards.

**Response:** Sandy's goals and policies related to Oregon Statewide Land Use Planning Goal 7, can be found in the Natural Hazards and Resiliency Vision Theme section of the 2050 Comprehensive Plan.

All future public and private development and infrastructure projects will need to comply with local, state, and national regulations related to earthquakes, floods, and other hazards. The City's Comprehensive Plan demonstrates an understanding of the potential impact of natural and human-caused disasters and introduces policies that reduce hazard vulnerability to people, property, and the environment.

While community safety is often regulated within the context of public facilities and services, community health is not explicitly governed in a regulatory environment, rather relying on the interconnected nature of policies that deal with physical, environmental, and economic characteristics of cities. Therefore, good governance can help design communities that improve police and fire response times, reduce collective energy use, increase resilience in the face of natural hazards, and encourage land use patterns that reduce vehicle trips and congestion. Well-designed communities can also help mitigate the effects of public health outbreaks as well as natural hazards that pose the greatest risk to Sandy, such as drought, earthquakes, floods, and winter storms.

Chapter 17.56, Hillside Development, of the Sandy Municipal Code conforms to the goals and policies of the new plan and intent of Oregon Statewide land Use Planning Goal 7 (Natural Hazards) by minimizing landslide hazards and soil erosion associated with development on steep or unstable slopes. These regulations shall apply to any parcel with slopes greater than 25 percent as shown on the Hillside Development Overlay District Map or with slope hazards mapped by the Department of Geology and Mineral Industries (DOGAMI).

**Finding:** Based on the response above, the proposed policies are consistent with statewide land use Goal 7 in the comprehensive plan themes section.

**Goal 8: Recreational Needs**

It is the purpose of this Goal to satisfy the recreational needs of the citizens of the state and visitors and, where appropriate, to provide for the siting of necessary recreational facilities.

**Response:** Sandy's goals and policies related to Oregon Statewide Land Use Planning Goal 8, Recreational Needs can be found in the Parks, Trails, and Natural Resources Vision Theme section of the 2050 Comprehensive Plan.

The availability of parkland and open space is a critical element in maintaining and improving the quality of life in Sandy. Land that features trees, grass, and vegetation provides not only an aesthetically pleasing landscape but also buffers incompatible uses and preserves environmental sensitive features and natural resources. Parks and open space, together with support facilities, also help to meet the active and passive recreational needs of Sandy residents.

Goal 8 is incorporated into multiple chapters in the Sandy Municipal Code and is the foundation of the 2022 Parks and Trails Master Plan. The updated goals and policies will continue to outline provisions for parks and open space that will increase Sandy's overall park inventory. These new goals and policies in the 2050 Comprehensive Plan include policy language that addresses future park needs and recreational facilities to satisfy the recreational needs of Sandy residents and visitors.

**Finding:** Based on the response above, the proposed policies are consistent with statewide land use Goal 8, Recreational Needs.

**Goal 9: Economic Development**

It is the purpose of this Goal to provide adequate opportunities throughout the state for a variety of economic activities vital to the health, welfare, and prosperity of Oregon's citizens.

**Response:** Sandy's goals and policies related to Oregon Statewide Land Use Planning Goal 9, Economic Development can be found in the Housing and Economy Vision Theme section of the 2050 Comprehensive Plan.

The Economic Development chapter of the 2050 Plan amplifies the primary basis of Goal 9 to make land available that leads to economic growth and development opportunities. Commercial and industrial development takes a variety of shapes and leads to economic activities that are vital to the health, welfare, and prosperity of a community. To be ready for these opportunities, local governments perform Economic Opportunity Analyses (EOA) based on a 20-year forecast of employment growth. The City of Sandy completed an EOA in 2023 to help guide the goals and policies in the comprehensive plan and the first ever Sandy Economic Development Strategic Plan.

The broader update of the Sandy Comprehensive Plan provided the opportunity to re-examine Sandy's employment land needs considering the continued changes in the national and regional economy since 2015, when the last EOA was completed.

The primary goals that came from the 2023 EOA are to (1) project the amount of land needed to accommodate the future employment growth within Sandy between 2023 and 2043, (2) evaluate the existing employment land supply within the city to determine if it is adequate to meet that need, (3) help the City understand its economic opportunities in the context of Sandy's comparative advantages and disadvantages, and (4) to fulfill state planning requirements for a twenty-year supply of employment land.

Most of the new goals and policies in the 2050 Housing and Economy chapter come from the data and recommendations from the 2023 EOA. Most new employment will come from an expansion of commercial and industrial lands, accounting for over 90 percent of new employment growth (2,339 employees) over the 2023 and 2043 planning period. Sandy is also projected to accommodate another 184 new government employees.

**Finding:** Based on the response above, the goals and policies developed from the EOA report and other sources are represented in the 2050 Comprehensive Plan and include policy language that conforms to the requirements of Statewide Land Use Planning Goal 9.

### **Goal 10: Housing**

It is the purpose of Goal 10 to provide for the housing needs of citizens of the state.

**Response:** Sandy's goals and policies related to Oregon Statewide Land Use Planning Goal 10, Housing can be found in the Housing and Economy Vision Theme section of the 2050 Comprehensive Plan.

The Housing Capacity Analysis (HCA) report is intended to identify issues with residential land use and unmet housing needs. The HCA addresses the specific requirement of Oregon's Statewide Planning Goal 10 and the Goal 10 administrative rules at OAR 660-008.

The HCA evaluates whether the City of Sandy has enough land to accommodate 20 years of population and housing growth. It provides the factual basis for an update to the City's Comprehensive Plan Housing Element, as well as the development of an action plan to implement the housing policies. The Housing Capacity Analysis (HCA) analyzes existing development patterns and intensity, existing land use designations and zoning, and building constraints to determine where there is vacant land and/or land that is likely to be redeveloped. Urban Growth Boundaries (UGBs) must accommodate residential, employment, and other land needs for 20-year study periods. The Residential Buildable Land Inventory in the HCA identifies how much land within the UGB is already developed and how much remains available to meet future housing needs. The planning horizon for the latest HCA was 2023-2043.

The HCA is based on an official population forecast and identifies the number of households and the characteristics of households the city needs to plan for today and in future years. Furthermore, it identifies the different types of housing needed for households of different income levels. Based on this information, the report identifies how much land is needed to accommodate a variety of different housing types. Comparing the capacity of the current residential buildable land supply in the UGB to the identified residential land need will clarify if current plans and policies will meet these needs.

The HCA played a large role in developing the goals and policies in the Housing and Economy Chapter of the 2050 Comprehensive Plan. Furthermore, recommendations in the HCA report were analyzed for inclusion into a housing-specific section of an updated Comprehensive Plan to provide specific housing policy guidance for Sandy going forward.

**Findings:** As housing supply is a critical part of the solution to meeting future housing demand, the goals and policies of the 2050 Comprehensive Plan were developed to address housing needs identified by the HCA and reflect the requirements of Statewide Land Use Goal 10. Based on the response above, the proposed policies are consistent with statewide land use Goal 10, Housing.

### **Goal 11: Public Facilities and Services**

It is the purpose of Goal 11 to plan and develop a timely, orderly, and efficient arrangement of public facilities and services to serve as a framework for urban and rural development.

**Response:** Sandy's goals and policies related to Oregon Statewide Land Use Planning Goal 11, Public Facilities and Services can be found in the Transportation and Infrastructure Vision Theme section of the 2050 Comprehensive Plan.

Goal 11 requires local governments to prepare Public Facilities Plans to plan and identify necessary infrastructure to serve future development. Sandy is to plan specifically for urban services (i.e., sanitary sewer, water, and storm drainage) for properties inside the UGB. New and modified policies and objectives in the 2050 Comprehensive Plan under Goal 11 speak to modernizing and maintaining municipal facilities in the most efficient and cost-effective manner to adequately serve the existing population and anticipated growth.

The City of Sandy provides many public facilities and services to its residents and coordinates with several other local service providers to provide timely, orderly, and efficient provision of services to serve the community. The City provides water, wastewater, stormwater, transportation facilities, public transit, and internet service. The City also coordinates with other facility providers, including the Oregon Trail School District, Portland General Electric, Hoodview Disposal & Recycling, Frontier, and

Northwest Natural. Reliable and consistent public facilities are necessary to maintain the high quality of life that residents enjoy. Planning for future expansions and capacity is vital to accommodating growth over the next several decades.

The goals and policies of the Comprehensive Plan support the criteria required for evaluating these systems, as well as the process for identifying system deficiencies and recommended improvements, as outlined in each of these system master plans. In addition to public infrastructure and services like water, sanitary sewer, and stormwater, the expansion of highspeed broadband capabilities across Sandy is a priority. Growth in broadband as a public utility can aid in energy conservation, the deployment of smart city applications, and growth in other technologies.

Following best practices in infrastructure and service planning, the City has also adopted several infrastructure Master plans, including:

- 2023 Sandy Transportation System Plan (TSP), (Ordinance No. 2023-24)
- 2022 Water System Master Plan, (Ordinance No. 2023-06)
- 2022 Parks and Trails Master Plan, (Ordinance No. 2021-26)
- 2020 Transit Master Plan (Resolution No. 2020-07)
- 2016 Water Management and Conservation Plan, (Ordinance No. 2023-06)
- 2003 Bornstedt Village Specific Area Plan (Ordinance No. 2003-09)
- 2002 Locally Significant Wetlands Determination (Ordinance No. 2002-18)

**Finding:** Sandy is planning for timely, orderly, and efficient arrangement of public facilities and services. Based on the response above, the 2050 Comprehensive Plan includes goals and policies regarding the future provision of public facilities and services staying consistent with Statewide Land Use Planning Goal 11.

### **Goal 12: Transportation**

The purpose of Goal 12 is to provide and encourage a safe, convenient, and financially responsible transportation system.

**Response:** Sandy's goals and policies related to Oregon Statewide Land Use Planning Goal 11, Transportation can be found in the Transportation and Infrastructure Vision Theme section of the 2050 Comprehensive Plan.

Goal 12 and the State Transportation Rule (TPR) (OAR 660-012) requires cities to provide and encourage a safe, convenient, and financially responsible transportation system. Together they require the City to develop and maintain a Transportation System Plan (TSP), which must be incorporated as part of the Comprehensive Plan. A local TSP acts as a guiding policy document for long-term transportation planning and presents the City's goals and policies while outlining and prioritizing proposed improvements for motor vehicle, pedestrian, bicycle, public transit, and freight systems in addition to neighborhood traffic management strategies. A local TSP also identifies funding sources



and collaborative partnerships to leverage resources for system maintenance and improvements. The City of Sandy last adopted a TSP in 2023 (Ordinance 2023-24).

TSPs are updated periodically due to changing economic, population, and travel trends. The TSP contains a set of goals and policies to guide the development of the future transportation system. Goal 12 requires that the land uses in the Comprehensive Plan and the supporting transportation facilities in the TSP are coordinated and compatible.

The transportation section of the 2050 Comprehensive Plan includes policy language supporting a transportation system that is safe, convenient, and provides transportation choices. The policies in the 2050 Comprehensive Plan promote a multi-modal system and prioritize street design features and techniques that promote safe and comfortable travel for all different transportation modes, based on the street context and function, to help reduce vehicle trips for daily needs. Other policies related to transportation include the support of cleaner and more efficient fuels, leveraging partnerships and funding, and ensuring safe and convenient transportation for all modes of travel.

The City's 2050 Comprehensive Plan contains a Goal 12 element that contains policies to ensure sufficient and adequate transportation facilities and services are available (or will be available as appropriate) to serve lands within the UGB.

It should be noted that the TPR is triggered when a post acknowledgment amendment "significantly affects" a transportation facility. The City finds that the 2050 Comprehensive Plan does not meet the definition of a "significant effect" pursuant to OAR 660-012-0060(1)(a)-(c) because it will not: (1) change the functional classification of an existing or future facility; (2) change the standards implementing the functional classification system; or (3) result in any of the effects listed in 0060(1)(c)(A)-(C). Furthermore, the 2050 Comprehensive Plan update does not propose zone changes or impacts to the transportation system pursuant to OAR 660-012-0060.

**Finding:** Based on the response above, the 2050 Comprehensive Plan includes goals and policies that are coordinated and compatible with the City's TSP, staying consistent with Statewide Land Use Planning Goal 12 and satisfies this standard.

### **Goal 13: Energy Conservation**

The purpose of Goal 13 is to conserve energy.

**Response:** Sandy's goals and policies related to Oregon Statewide Land Use Planning Goal 13, Energy Conservation can be found in the Natural Hazards and Resiliency Vision Theme section of the 2050 Comprehensive Plan.

The 2050 Comprehensive Plan identifies goals, policies, and objectives aimed at conserving existing energy resources and for developing alternative sources. The Comprehensive Plan identifies certain objectives that can be implemented via future

amendments to the Sandy Development Code. The City encourages drought-tolerant plants (as part of landscape plans for development review) and the following policies:

- Promote infill development that can take advantage of the close proximity to certain destinations to reduce vehicle trips.
- Ensure a responsive development code that encourages energy efficient design.
- Encourage the development of electric vehicle charging stations in existing development, new development, and during redevelopment.
- Expand infrastructure for walking, bicycling, and transit which uses less energy than other transportation modes.

**Finding:** Based on the response above, the goals and policies reflected in the 2050 Comprehensive Plan are consistent with Goal 13, Energy.

#### **Goal 14: Urbanization**

The purpose of Goal 14, Urbanization, is to provide for an orderly and efficient transition from rural to urban land use, to accommodate urban population and urban employment inside urban growth boundaries, to ensure efficient use of land, and to provide for livable communities.

**Response:** Sandy’s goals and policies related to Oregon Statewide Land Use Planning Goal 14, Urbanization can be found in the Governance and Growth Management Vision Theme section of the 2050 Comprehensive Plan.

Goal 14 explains how local jurisdictions are required to provide for an orderly and efficient transition from rural to urban land use, to accommodate urban population and urban employment inside urban growth boundaries (UGBs), and to provide for livable communities. Goal 14 also describes the purpose and function of UGBs.

The Governance and Growth Management Chapter addresses urbanization that includes background information related to the most recently adopted Housing Capacity Analysis (HCA) and Economic Opportunities Analysis (EOA) which is essential data for determining if UGB expansion is warranted. It also references the Urban Growth Management Agreement (UGMA) between the City of Sandy and Clackamas County, which serves as a guide to extension of public services to urbanizing areas. Goals 9 and 10 call for “growth and development in a manner that implements the City’s 2050 Comprehensive Plan and maintains an urban growth boundary that supports and accommodates projected population and employment during the 20-year planning period.” Policies and strategies under these goals relate to efficient use of land and infrastructure, more compact walkable neighborhoods, and balanced land uses to provide for housing and employment.

**Finding:** Based on the response above, the 2050 Comprehensive Plan includes goals and



policies that stay consistent with Statewide Land Use Planning Goal 14 and satisfies this standard.

As the Comprehensive Plan explains, seven other statewide goals were not considered applicable. These goals include Goal 3, *Agriculture Lands*, Goal 4 *Forest Lands*, Goal 15 *Willamette River Greenway*, Goal 16 *Estuarine Resources*, Goal 17 *Coastal Shorelands*, Goal 18 *Beaches and Dunes*, and Goal 19 *Ocean Resources*. It is acknowledged that Sandy is primarily urban and not located in proximity to the Willamette River, estuaries, shorelands, beaches, or the Pacific Ocean.

**Conclusion:** Based on the facts and findings above, the proposed Legislative Amendment complies with applicable Oregon Statewide Land Use Planning Goals.

**Sec. 17.24.80. Action by the hearing body.**

- A. *Planning Commission.* The Planning Commission shall conduct a public hearing in accordance with Chapter 17.20—Public Hearings. Following the close of the public hearing, the Commission shall make a recommendation to the City Council concerning the proposed Comprehensive Plan map amendment. The Commission's recommendations shall include findings that specify how the proposal has or has not complied with the above review criteria.
- B. *City Council.* Upon receipt of the Planning Commission's recommendation the matter shall be set for a de novo public hearing before the City Council. Following the close of the public hearing, the City Council shall either deny the application or adopt an ordinance approving the proposed Comprehensive Plan map amendment or a modification thereof. The City Council's decision shall include findings that specify how the proposal has or has not complied with the above review criteria.
- C. Notwithstanding any contrary code provision and in the City Council's sole discretion, it may allow an amendment to proceed directly to a public hearing before the City Council without a hearing or recommendation from the Planning Commission.

**Findings:** As stated above, this is a City initiated amendment to the Comprehensive Plan. This is a Type IV review process, and as such, the Planning Commission conducted a public hearing and provided a recommendation to the City Council. The public hearing on August 26, 2024, was the first of two hearings required by the Sandy Development Code as described in Section 17.12.40 (the Type IV Legislative Procedure) and procedures required by state law. The second hearing occurred before the City Council on October 7, 2024. All Comprehensive Plan Amendments are subject to “Post-Acknowledgement Procedures” described in ORS 197.610 through 197.651. Content of public notice for hearing purposes, timing, and due process for appeals are described therein. In review of ORS 197.610 through 197.651, the following key procedural items have been completed as follows:

- On July 19, 2024, the Oregon Department of Land Conservation and Development (DLCD) received required notification of the proposed Comprehensive Plan

amendment commensurate with the timing required (35-days) prior to the first public hearing at which public testimony or new evidence is to be received. The hearings-ready document (Exhibit B) and these proposed findings were uploaded to the DLCD website on that day.

- On August 14, 2024, pursuant to Section 17.22.30, the Sandy Post newspaper company published required notice of said public hearings.

The Comprehensive Plan document dated October 2024 (Exhibit B) and Appendix are subject to public hearing and subsequent ordinance adoption.

# Envision Sandy 2050 Comprehensive Plan

October 2024







# Letter from the Mayor



Dear Sandy Community,

As Sandy's Mayor, it is my honor to present to you our updated Comprehensive Plan, "Envision Sandy 2050." Our city last adopted a comprehensive plan nearly three decades ago in 1997, when I was a member of our high school Shadow Council. Since that time Sandy has grown from 5,000 residents to over 13,000. This update is a singular opportunity to affirm our priorities and chart a course for our continued success in the decades to come.

Sandy is a truly wonderful place to call home. Building on the pioneering spirit of those who first settled here, Sandy has blossomed into a resilient and prosperous town full of community pride. As the gateway to Mt. Hood, our breathtaking natural scenery, thriving small businesses, and safe neighborhoods provide a quality of life found nowhere else in Oregon. With small-town roots and top-flight amenities, there is simply no better place to live, work, and raise a family. Envision Sandy 2050 was developed to ensure that all the things we cherish about Sandy will live on far into this century.

Envision Sandy 2050 represents our collective vision for the future of our town. This new plan is the product of two years of dedication and commitment from members of our Community Advisory Committee, City staff, Planning Commissioners, and City Council members. Importantly, the plan includes extensive input and feedback received directly from Sandy residents. To everyone who participated in this critical planning effort, you have my sincere thanks.

On behalf of the Sandy City Council, we look forward to working together with our neighbors to put this plan into action. With our combined efforts, I have no doubt that we will achieve our shared dreams for our community – for this generation, and many generations to come.

Let's keep Sandy wonderful,

A handwritten signature in black ink, appearing to read "Stan Pulliam". The signature is fluid and cursive, with a long, sweeping underline that extends to the right.

Stan Pulliam  
Mayor of Sandy

# Acknowledgements

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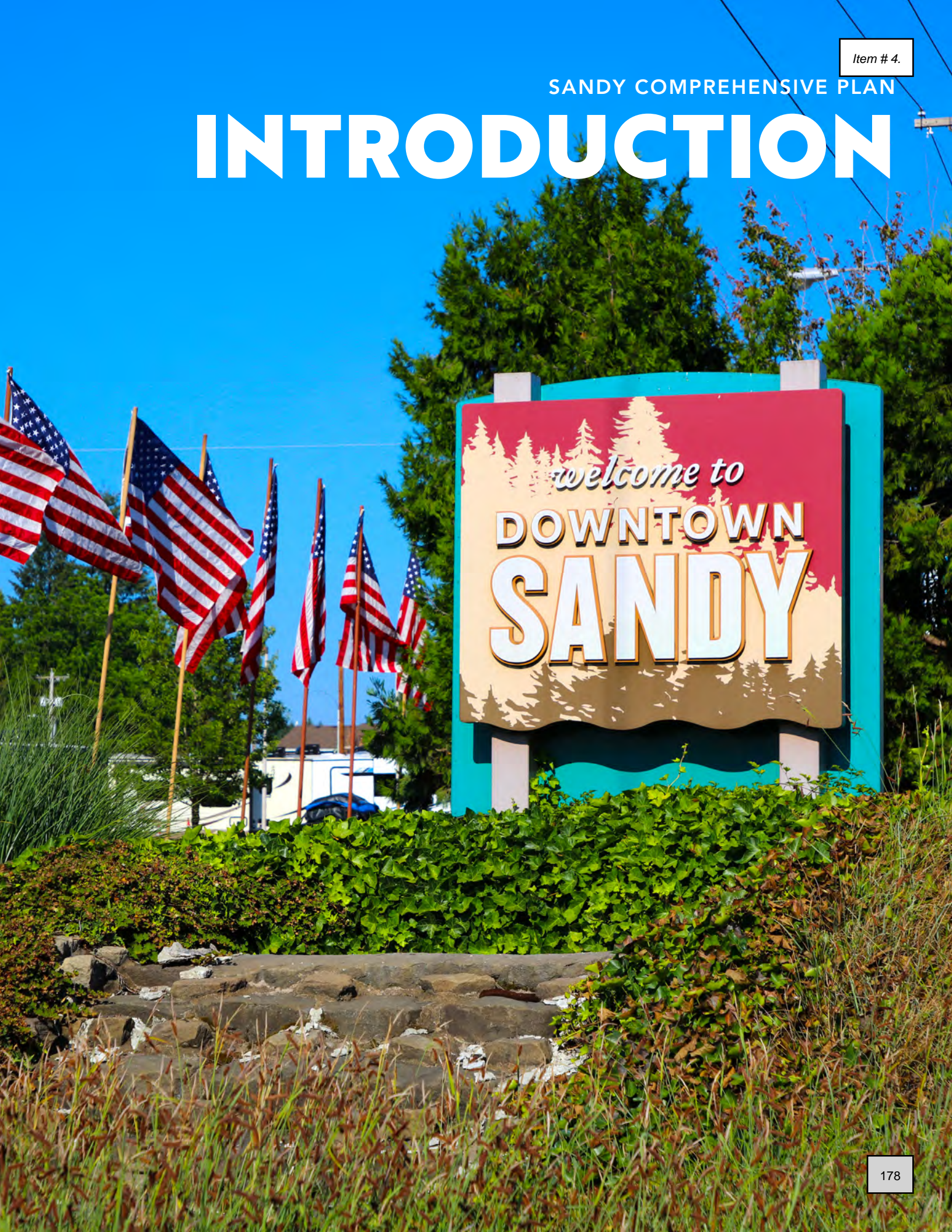
Karen Tolvstad, President

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# INTRODUCTION







## About this Plan

The Comprehensive Plan guides how Sandy will plan for and manage future growth and development through 2050. It directs all activities related to land use and the future of built systems and services in Sandy. It also has an important purpose as the primary means for realizing the community's vision for the future.

The Comprehensive Plan establishes a policy framework rooted in a factual basis that helps inform other critical planning documents and implementing tools that together serve as a coordinated, overarching strategy for the City. This approach establishes the structure for how the City works and provides services, and the types of services that it provides. Ultimately, the Comprehensive Plan outlines the direction that the City will take when planning for land use and informs all of its land use decisions and actions, including how land is developed and services are provided.

The Plan is designed to be accessible to everyone who participates in the City's land use planning process – not just government agencies, elected officials, Planning Commission, and builders and developers, but also neighborhood and community groups, and community members representing all interests.



## A Brief Overview of Oregon’s Land Use Planning Requirements

Comprehensive planning in Oregon was mandated by the 1973 Legislature with the adoption of Senate Bill 100 (ORS Chapter 197). Under this Act, the Land Conservation and Development Commission (LCDC) was created and directed to adopt Statewide Planning Goals and Guidelines. These Goals and Guidelines were adopted by LCDC in December 1974 and became effective January 1, 1975.

To date, Oregon has adopted nineteen Statewide Planning Goals, and all Oregon cities and counties are required to have a Comprehensive Plan that is consistent with these Goals. Statewide Planning Goals include topics such as land use planning, citizen involvement, housing supply, economic development, transportation systems, natural resources management, recreation, and more. Each Statewide Planning Goal includes a set of guidelines that, in conjunction with community priorities, help direct the content within comprehensive plans. Once adopted, all of a City or County’s community and area plans, zoning codes, permits, and public improvements are required to be consistent with the Comprehensive Plan. This structure ensures that cities implement the State’s policy goals first through the comprehensive plan, and then by more detailed supporting and implementing documents.

**Twelve of the nineteen Statewide Planning Goals apply to Sandy. These include:**

- Goal 1:** Citizen Involvement
- Goal 2:** Land Use Planning
- Goal 5:** Natural Resources, Scenic and Historic Areas, and Open Spaces
- Goal 6:** Air, Water, and Land Resource Quality
- Goal 7:** Areas Subject to Natural Hazards
- Goal 8:** Recreational Needs
- Goal 9:** Economic Development
- Goal 10:** Housing
- Goal 11:** Public Facilities
- Goal 12:** Transportation
- Goal 13:** Energy Conservation
- Goal 14:** Urbanization

## How are Comprehensive Plans used?

Zoning and development code serve as the major implementation mechanism of the Comprehensive Plan. The City's zoning map shows the type, location and density of land development and redevelopment permitted in the future and may be updated to reflect the policy framework established by the Comprehensive Plan. The Comprehensive Plan is also implemented through area-specific and topic-specific plans, which guide public investments.

Area-specific planning efforts take place for a smaller part of the city, like a district or neighborhood, such as the Bornstedt Village Plan. Sandy also adopts plans that are topic or infrastructure-specific, such as Transportation, Sanitary Sewer, and Water Master Plans. These plans contain many components, such as background information, assessment of existing conditions or system deficiencies, overarching goals or evaluation criteria, potential capital improvement projects, as well as policies, code amendments, land use or zoning map changes. These plans should follow the ethos of the Comprehensive Plan and should not contradict its goals. The components of area-specific or topic-specific plans either can be adopted by ordinance or resolution. They can also result in an amendment to the Comprehensive Plan or its implementation tools to ensure they stay current over time. Area or topic-specific plans direct the work of a City's departments, like Planning, Public Works and Parks and Recreation, through action plans and departmental budgeting.

## Elements of a Comprehensive Plan

In addition to goals and policies for a broad range of topics, Comprehensive Plans are required to include other components. This includes technical analyses and background research to help set the policy framework, as well as implementing plans that provide detailed guidance for specific systems and geographies. While these analyses and background documents are generally incorporated in a Comprehensive Plan by reference, they provide a foundation for the development of goals and policies.

In addition to referencing a factual basis and establishing goals and policies, a Comprehensive Plan also includes a comprehensive plan map that spatially designates residential, employment, and mixed-use development and resource lands in a way that best implements the goals and policies included in the Comprehensive Plan.



## Developing Goals and Policies

The heart of the Comprehensive Plan is the community's vision for the future. The goals and policies are a direct expression of the desires of the community, as captured through the City's community-wide visioning process, Envision Sandy 2050.

Utilizing the framework of the Envision Sandy 2050 Vision Statement and information from the factual base, the goals and policies of the Comprehensive Plan describe the long-term outcomes and direction on how the City will achieve the intended work of the Plan. Specifically:

- Goals are long-term outcomes the City hopes to achieve by implementing the Comprehensive Plan. They are aspirational, expressing community members collective desires and values.
- Policies set preferred direction and describe what must be done to achieve these broad goals. They are specific enough to help determine whether a proposed project or program would advance the values expressed in the goals.

## Why update the Plan?

The City's current Comprehensive Plan was adopted in 1997. Since that time, Sandy has experienced rapid population growth and shifts in demographics. Although some of the recommendations of the current Plan still hold value, the fundamental data and trends used to establish the recommendations are outdated. The updated Plan needs to reflect updated data and trends and community priorities regarding livability; infrastructure; transportation; economy; resilience to natural hazards; growth management; housing and housing affordability; and parks and trails. In conjunction with major updates the City's Housing Capacity Analysis (HCA), Economic Opportunities Analysis (EOA), Transportation Systems Plan (TSP), and other factual bases, the Envision Sandy 2050 process established a new vision for the future and reset the policy framework of the Comprehensive Plan.



# COMMUNITY ENGAGEMENT & PLAN UPDATE PROCESS











In spring 2022, the City of Sandy launched “Envision Sandy 2050,” a citywide engagement effort to update the Sandy Comprehensive Plan. The first step in the process was to create a community vision that reflects what community members enjoy and want to preserve about Sandy, and what they would like to see changed in the future.

Over the course of nearly two years, City staff led outreach and engagement efforts to better understand the community’s vision and priorities related to Sandy’s future. As of July 2022, the Envision Sandy 2050 process touched more than 1,000 community members through Community Conversations, community events, online surveys and the Sandy Speaks webpage. Activities were designed to identify common themes around the aspirations and concerns of a community, which are a key piece to the development of a community-wide Vision Statement for the Comprehensive Plan.

### Community Advisory Committee

To guide the Envision Sandy 2050 process, a volunteer Community Advisory Committee (CAC) was convened to represent a broad cross-section of Sandy residents, business owners and community leaders. Membership to the CAC was appointed through an open application process. The CAC reviewed materials, acted as liaisons to various constituencies and interest groups and hosted outreach events and activities. The CAC was instrumental in advancing community priorities to craft the vision and develop policies.

 A person in a green shirt is standing and pointing at a whiteboard. Several other people are seated at long tables in front of the whiteboard, looking towards the presenter. The setting appears to be a meeting or presentation room.



## Community Conversations

To reach a wide spectrum of Sandy community members, project staff and members of the Community Advisory Committee (SAC) facilitated community conversations with local groups, clubs, committees, and organizations in Sandy. Over the course of five months, twelve community conversations were conducted with the following groups, engaging approximately 85 community members in Sandy:

- Chamber of Commerce
- AntFarm Youth Services
- Parks and Trails Advisory Board
- Economic Development Advisory Board
- Sandy Police Department
- SandyNet Advisory Board
- Library Advisory Board
- Planning Commission
- Group of Sandy High School staff
- Group of local developers
- Group of Spanish speakers

In addition, multiple community conversations were held with Sandy High School classes, including Leadership and Advisory classes. These events engaged over 250 students in group discussions and interactive polling. Students learned about civic engagement, community development, and the City’s land use planning system, and shared their ideas for Sandy’s future.







## Community Events

Throughout the summer of 2022 and 2023, the project team staffed an Envision Sandy 2050 booth at multiple Farmers’ Markets, the Longest Day Parkway event, and the Sandy Mountain Festival. Tabling at community events provided a unique opportunity to reach many people in one place. Materials for tabling were designed to gather community ideas, and activities included intercept surveys in English and Spanish.

## Online Engagement

The City of Sandy maintained an active project website on Sandy-Speaks web platform with information about the project and ways to get involved. Online surveys were promoted through the Sandy Source newsletter, social media, community listservs, as well as through business flyers and door direct mailers that reached all Sandy residents within the UGB.

## Outreach to Spanish Speakers

Outreach to Sandy’s Spanish-speaking community was conducted through a grassroots process that leaned on wide-reaching social media posts, informal gatherings at the Vista Apartments, St. Michael’s Catholic church, and community members connected to a variety of services and programs in Sandy. This included Spanish speakers from NW Family Services, AntFarm’s Nuevo Futuro program, Todos Juntos and Olga Sanchez at the School District.







## Future Fest

At a key milestone in the Envision Sandy 2050 process, a community meeting was held to report back on the outreach and engagement activities, vet and refine the draft Envision Sandy 2050 Vision Statement, and identify priorities and opportunities for achieving the vision. The Future Fest event helped lay the groundwork for developing goals and policies for the Comprehensive Plan.

More than 40 community members participated in the event at the Wippersnappers Kids’ Play Place, where free kids’ play, food and beverage were provided. A wide range of participants included residents, business owners, families with children, and elected officials.

Discussions were robust and collaborative, resulting in dozens of community ideas and feedback on the draft vision statement. Key issues included wildfire mitigation, parks maintenance, and pacing infrastructure with development. This feedback from the community was incorporated in the new Sandy Comprehensive Plan policy framework.



## Natural Hazards and Resiliency Planning Workshops

As part of the comprehensive planning process, the City of Sandy undertook a process to develop policies and actions related to expanding resilience to changing conditions and extreme weather events. This process involved two stakeholder workshops where city staff, local experts, and residents came together to identify vulnerabilities related to changing conditions and develop cross-sector strategies to address them.

At the first workshop, participants reviewed the information regarding accelerating trends related to extreme heat, drought, water availability, snowpack, wildfire, and other climate patterns to identify vulnerabilities to the City of Sandy.

This effort resulted in the vulnerability assessment included in the Sandy Comprehensive Plan Appendix. In the second workshop, participants came together to identify strategies and related actions, and gather information relative to the co-benefits, tradeoffs, relative cost, effectiveness, and responsible party. Some of these strategies were developed into goals and policies included in the Sandy Comprehensive Plan. Detailed information about all strategies developed in this process is included in the Appendix was documented to help guide implementation of resilience-related policies included in the Comprehensive Plan or undertaken through other local government processes.

### Workshop participants included:

- Gianna Alessi, Clackamas County Disaster Management
- Greg Brewster, City of Sandy
- Jevra Brown, Oregon Department of State Lands
- Shelby Butcher, Rural Community Assistance Corporation
- Rukshana Chand, Clackamas Workforce
- Bill Conway, Clackamas County Public Health
- Suzi Cloutier, Soil and Water Conservation District
- Jerry Crosby, Planning Commission
- Matthew Degner, City of Sandy
- April Dobson, Todos Juntos
- Aeris Eaton, Sandy High School
- Thomas Fisher, City of Sandy
- Aryka Hanto, Clackamas County Disaster Management
- Andi Howell, City of Sandy
- Kirsten Ingersoll, Clackamas County Health, Housing, and Human Services
- Khrys Jones, Chamber of Commerce
- Joe Johansen, City of Sandy
- Clair Klock, Clackamas Soil and Water Conservation District
- Chelsea Lincoln Lane, Oregon Trail School District
- Evelyn Lawyer, Sandy High School
- Emily Meharg, City of Sandy
- Heather Michet, Iris Healing Arts
- Julia Monteith, Oregon Trail School District
- Casie Morris, Todos Juntos
- Kirsten Pitzer, Action Center
- Kelly Reid, Department of Land Conservation and Development
- David Snider, City of Sandy
- Michelle Valencia, Sandy High School
- John Wallace, City of Sandy
- Jay Wilson, Clackamas County Disaster Management







SANDY COMPREHENSIVE PLAN  
**ABOUT SANDY**





*Chinook Indians in Front of Mount Hood - 1853 By Paul Kane*

## History of Sandy

### INDIGENOUS PEOPLE

The first documented inhabitants of the Sandy area were local bands of Kalapuya Native Americans. The Kalapuya lived throughout Oregon's Willamette Valley and subsisted primarily on fish, game animals, camas root, fern, and local berries. Indigenous people would move about following food sources as they changed seasonally, thriving until the introduction of external diseases in the early 1800s. It is estimated that approximately 75 percent of the local Kalapuya population was lost to smallpox, the measles, influenza, and venereal diseases by 1832. The remaining indigenous population in the area and the five tribes of the Willamette Valley moved to the Grand Ronde Reservation.

The indigenous name for Mount Hood is Wy'east. The name originated with the Multnomah tribe of the Columbia river valley. The name Wy'east has been associated with Mount Hood for more than a century, but no evidence suggests that it is a genuine name for the mountain in any indigenous language.



## PIONEERS

Sandy was named for the nearby Sandy River which was originally identified as the “Quicksand River” by Lewis and Clark; however, the name “Quicksand” gradually evolved into “Sandy.”

1845

In **1845**, Samuel K. Barlow, a pioneer emigrant from Kentucky, blazed a road (known as the Barlow Road) from The Dalles around the south side of Mt. Hood to Eagle Creek, thus completing the last leg of the famous Oregon Trail that began in Independence, Missouri. There he faced the dangers of rafting and the struggles of portaging through the treacherous Columbia River and the Gorge. Barlow had hoped to find an old trail created by indigenous people around the south of Mount Hood, and he did. These 80 to 90 miles of difficult terrain became known as the Barlow Road. In 1845, Barlow petitioned the Provisional Government (then in Oregon City) for authority to build and collect toll from Tygh Valley to Oregon City. He was granted the rights in short order naming the road Mt. Hood Road, but it has always been commonly known as the Barlow Road.



*The Portage - 1897 By Winslow Homer*

1850

Virtually all of Sandy’s land claims were made after the **1850** Donation Land Claim Act. The offer of free land caused many people to make the arduous overland journey to the Oregon territory during the **mid to late-1800s**. The Act designated parcel sizes to be 320 acres (640 for a married couple) and required they be rectangular in shape, which influenced the development and population growth pattern the City would ultimately take. The greatest influx of early settlers to Sandy occurred in **1852 and 1853**.

When the first settlers arrived in the area of Sandy, they found most of it covered in a thick forest primarily composed of Douglas fir and cedar trees. Some of the trees were noted to be from 6-10ft. in diameter. In between sections of forest were flat grasslands with intermittent trees, mostly oak. The grassland areas were the first sections of land to be claimed and settled, as they were the easiest to build and farm on. Once the grassland areas became scarce, forestlands were claimed, cleared, and settled. Later, people came primarily for the trees and the profits to be made in timber, and subsequently people settled on the cleared land.



1853

Sandy's first settlers, the Francis Revenue family, arrived in **1853** and soon opened a trading post on the Barlow Road which served thousands of pioneers who traveled through on their way to the Willamette Valley. John and Francis Revenue started building a log schoolhouse and in 1870 the Revenue School District, No. 6 was formed. In 1874 Francis Revenue built the Revenue Hotel. It was Sandy's first hotel.



1894

## SANDY'S ECONOMY

According to local historians, there is no question that Sandy's heritage was founded on logging and sawmilling. Early residents used to say, "there was a sawmill behind every stump." Sandy's rugged terrain did not attract farming, but it was blessed with a thick cover of beautiful old growth timber. The harvesting and processing sustained the area's economy for many years. At one time or another there were more than 60 sawmills in the area. In addition, there were many logging camps to supply the sawmills with logs. This industry not only brought money to the area but also employed many of the residents.



As more and more sawmills opened up, additional specialty shops and tradesmen were needed. Robert Jonsrud started a blacksmith shop in Sandy in **1894** when he was 21 years old. His shop was on the north side of present Pioneer Blvd. between Shelly and Straus Avenues. His specialty was horseshoeing and wagon-repair work.

The primary way logs would be "yarded" out of the woods was by a team of horses. One of the largest sawmills in the area was the Sandy Fir Lumber Company. The sawmill was located just outside of Sandy on Tickle Creek and was owned by John Straus and W.A. Proctor.

1900

## BUILDING A TOWN

**In the early 1900's**, Sandy was a tough primitive village with mostly muddy, unplanked roads, no public water system, no public sewer system, no city government or constable, no electricity, and no doctor.

Most of the growth in the early 1900's has been attributed to what was going on in the Bull Run area; building of a diversion dam, flumes, tunnels, an artificial lake (Roslyn Lake), and an electric generating plant. At one time there were between 200 and 300 people employed on these projects. The village of Sandy (population just under 200) supplied many of the daily needs for these workers, including a place to go on Saturday nights.



1913

The little village of Sandy was trying to incorporate as a city for a number of years. The trouble was a requirement of a minimum population of 200. Sandy's population hovered just below that for quite some time. Finally, the population requirement was met and on **August 11, 1911**, the village of Sandy incorporated as a city, and on **November 14, 1913**, the voters approved the city's charter. The first act of the new city council was to hire L.A. Davis as Town Marshal.

**In October 1913**, the city experienced a major fire which destroyed numerous buildings and businesses, including a restaurant, livery stable, and saloon, all located on the south side of the Main Street (now known as Proctor Boulevard). A concrete replacement of the restaurant and saloon was subsequently erected, marking the first concrete building in the city.







In 1911, A.L. and M.A. Deaton opened Clackamas County Bank (CCB) in a portion of H.S. Eddy's real estate office. In 1912, W.A. Proctor was taken in as a stockholder. In just a few years, the tiny bank was able to construct its own building. In 1918, Proctor bought controlling interest in the bank. CCB survived the Great Depression and is going strong today. It's the oldest community bank in Oregon. The CCB corporate offices are now located on Proctor Boulevard and have been there since the 1950s.

1919

## ERA OF THE AUTOMOBILE

In 1919, the State Highway Department accepted Barlow Road and proceeded to build a new Mt. Hood Highway from Gresham to Mt. Hood going through Sandy. In the mid 1920's, the State completed the Mt. Hood Loop Road from Government Camp to Hood River. That opened up the whole area which boosted commerce and all sorts of automobile excursions.

Ludwig Hoffmann constructed this building for his new business, the Sandy Meat Market. The attached house next door was also built by Ludwig, where he and his family lived. With horse-drawn wagons he delivered to homes, sawmills, and the many camps in the outlying areas. The business flourished and began to include grocery items.

In the 1920s Ludwig added trucks to his fleet and expanded their delivery area out to 75 miles of rough road to the other side of Mt. Hood.



This photo is Main Street in 1917 which is modern day U.S. Route 26.



Sandy Meat Market

1920

Logging and sawmilling **in the 1920's** benefited the most from the introduction of the truck. By 1920, cars and trucks had displaced wagons and it was no longer necessary to rely on horsepower. Although the early truck started out as primitive, trucks had been improved so much that they could be used to transport logs to the sawmills. Previously, unless the logs could be moved by rail or water, the sawmills were forced to move to the timber sites. Now trucks could transport lumber a far greater distance.



When automobiles began replacing horses and wagons, carriage repair shops were adapted to garages.

**In 1910**, R.S. "Bob" Smith and his brother worked as blacksmiths. They mostly did horseshoeing and repair of wagons and buggies. In 1915, R.S. bought his brother out and the property next door and built a garage to sell and repair automobiles. He also sold Standard gasoline. **In 1935**, R.S. built the Spanish Revival building with Art Deco shapes, colors, and motifs woven into the architecture.



R.S. served a term as mayor in 1929 and councilman from 1941-44. The Smith family business lasted for 86 years.

1962

## POST WAR ERA

After World War II, Sandy's main economy continued to specialize in mills for the purpose of processing timber. The Bittner Mill in Sandy operated from **1940 until 1956**, when it closed. It produced millions of alder plugs for paper mills where they were used to plug and stabilize the open ends of paper rolls, such as newsprint.



**In 1962**, Oja Lumber Company acquired an existing sawmill on Tupper Road where it now meets Dubarko Road. Between the 1960s and 1980s, Olaf Oja employed over 20 people to mill logs, truck them to the main location in Sandy, and finish them into boards. As small mills began disappearing around the Sandy area, Oja Lumber began working with Vanport Manufacturing in Boring. The Oja Lumber Company remained open until 2016 when it was demolished for the construction of the local Goodwill Superstore and the Wendy's restaurant.



**Olaf Oja, right, gets help cutting down a tree on the future site of his long-time business Oja Lumber Company.**

**1973**

The Mountain Festival started in **1973** and has grown to be one of the largest annual events in Clackamas County. In 1976, the festival committee took advantage of the short-lived pet rock fad to stage pet rock races.



The City of Sandy adopted its first comprehensive plan in August of **1973**, called the 'Comprehensive Plan for the Sandy Area'. The first comprehensive plan was completed by Robert E. Meyer Engineers. The first comprehensive plan was prepared with financial aid through a federal grant as authorized by Section 701 of the Housing Act of 1954. On June 2, 1980, the City of Sandy adopted its second comprehensive plan with Ordinance No. 11-80. According to DLCD, the 1997 comprehensive plan was the first Sandy Comprehensive Plan that was acknowledged by the State of Oregon.

1974

Two of Sandy's most iconic businesses were established in the early 1970s. The Tollgate Inn Restaurant was established in **1973** and Joe's Donut Shop was established in **1974**.



1984

Sandy's second female Mayor, Ruth Loundree, presented the key to the City of Sandy to William "Bill" Johnson, the gold medalist in downhill skiing at the **1984** Winter Olympics in Sarajevo, Yugoslavia. Bill attended Sandy High School and got his early training in the downhill event while skiing in the Mount Hood area.



2009

**MILLENNIAL**

The Sandy Style architectural standards were established in **2009**. After adoption of the Sandy Style, the City established a facade improvement grant program through the Urban Renewal Agency which transformed the city's downtown over the last 15 years. The standard is meant to celebrate Sandy as the Gateway to Mount Hood by adapting elements of Cascadian architecture popular between 1915-1940.





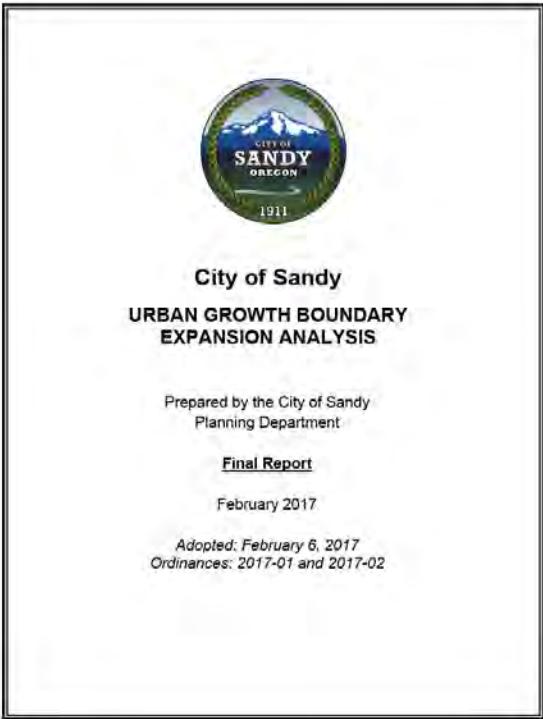


2012

The new Sandy High School on Bell Street opened in the fall of **2012** replacing the 90-year-old facility on Bluff Road. This 310,000-square-foot building employed a broad range of sustainable-design strategies that reduced the school’s carbon footprint and tied it to the natural beauty of the Pacific Northwest.

2017

In **2017**, the City expanded the UGB by 668 acres to accommodate housing, employment, park, and school needs for 20 years. The last time the UGB had been amended was in 1997 when the Bornstedt Village area south of Highway 211 and west of Bornstedt Road was brought into the UGB.



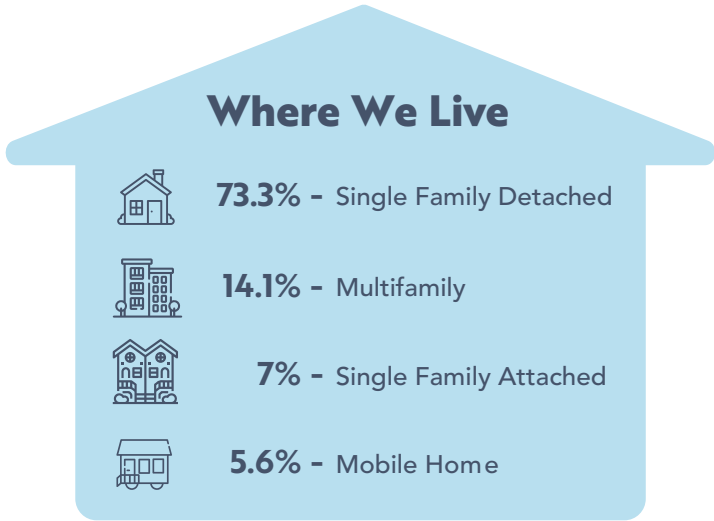
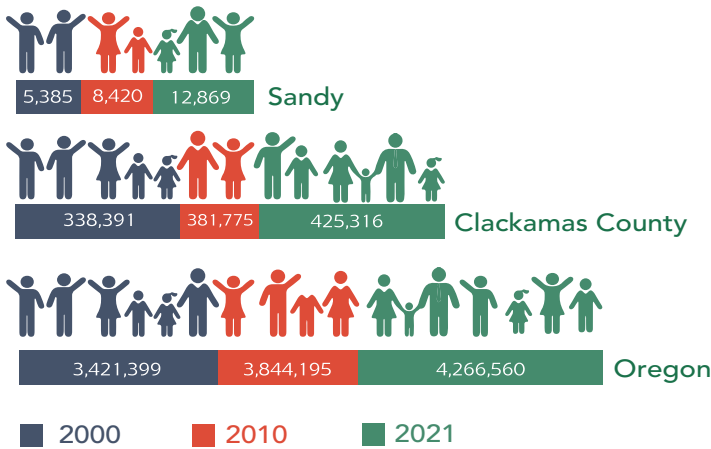
# Where We Are Today

## Envision Sandy 2050 Community Snapshot

Sandy 2050 will guide how Sandy will plan for and manage future growth and development through 2050. It directs all activities related to land use and the future of built systems and services in Sandy. It also has an important purpose as the primary means for realizing the community’s vision for the future.

To envision the future of Sandy, this community profile provides a shared understanding of Sandy as it exists today.

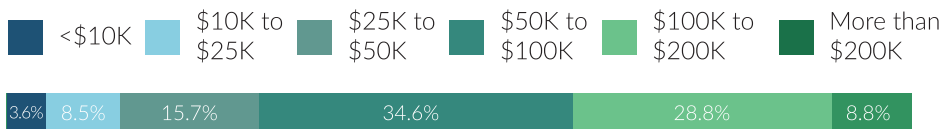
### Who We Are



The population of Sandy is forecasted to grow by 7,788 people between 2020 and 2045 to include a total estimate of 20,657 people! Sandy’s Hispanic/Latino population increased between 2000 and 2015–2019 from 4% to 10%, and Sandy’s households are larger with nearly half of households consisting of 3 or more people.

The median gross rent in Sandy over the 2015-2019 period was \$1,228. About 33% of Sandy’s households are cost burdened, compared with the county average of 32%. Median home sales prices have escalated over the last ten years increasing from almost \$200,000 in 2012 to almost \$500,000 in 2022.

### What We Earn



Between 1999 and 2019, Sandy’s median household income increased from about \$42,000 to about \$73,000 per year. However, Sandy’s median household income is about \$7,000 less than Clackamas County.



## Commuting Flows



80% of the workers commute into Sandy from other areas, most notably Gresham. More than 5,000 residents of Sandy commute out of the city for work, most of them traveling to Portland (27%). About 20% of all people who work in Sandy also live in Sandy. About 13% of Sandy residents who are employed, work and live in Sandy.

## Where We Work

Top five sectors in Sandy:



Between 2008 and 2019, employment in Sandy increased by about 695 employees (23%), at about a 1.9% average annual growth rate. Sandy has a higher labor force participation rate (69%) relative to Clackamas County (65%) and Oregon overall (62%).

## Wildfire

Extreme wildfire danger averaged **11 days per year** across Clackamas County in the 1990s and is expected to increase to **19 days per year** by the middle of this century.



The threat of wildfire is real for residents of Sandy. As fires continue to worsen, smoke becomes a hazard to human health, especially for residents with underlying health conditions and those who are unable to protect themselves by accessing clean indoor air.

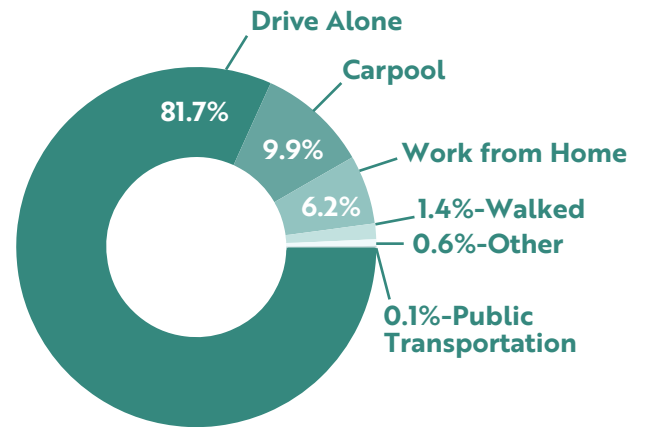
### Sources

U.S. Census Bureau, American Community Survey 2015–2019 5-Year Estimates  
 U.S. Census Bureau, American Community Survey 2020–2025 5-Year Estimates  
 Portland State University Population Estimates, 2021  
 Oregon Employment Department, Quarterly Census of Employment and Wages

City of Sandy 2021 Parks and Trails Master Plan  
 Future Climate Dashboard web tool. Climate Toolbox (<https://climatetoolbox.org/>)  
 Data USA: Sandy, OR (<https://datausa.io/profile/geo/sandy-or>)

## How We Get to Work

Modes of Transportation:



## Parks & Recreation





## Land Use Gallery

Regulated by the Comprehensive Plan, Development Code, Parks and Trails Master Plan, and the Transportation System Plan, Sandy has taken on a physical form that defines the experience of anyone who lives, works, or visits Sandy. The resulting development pattern provides the stage on which daily life takes place. This section of the Comprehensive Plan explores these development patterns, revealing the relationship between the system of land use regulations, parks and trails, transportation, and the underlying landform.

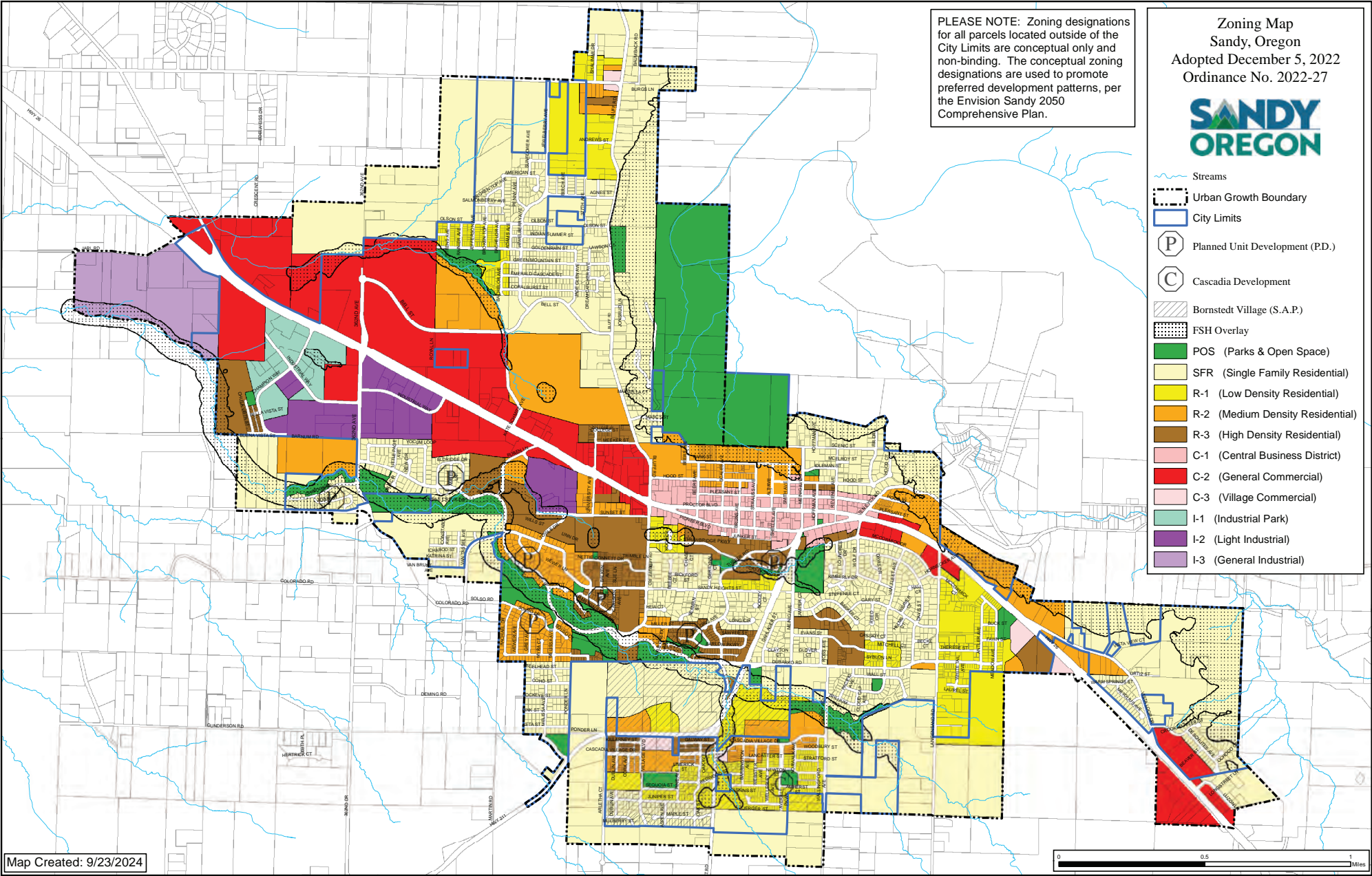
While the Comprehensive Plan provides policy guidance for the general and long-term location, type, density, and timing of new growth and development, the zoning districts outlined in the Development Code enacts detailed regulations and use standards for the development of land. Comprehensive plan land use categories ensure an adequate supply of land for residential, commercial, and industrial development purposes ensuring the development of a complete community.

The following land use categories have been developed for use in the Comprehensive Plan Map.

The Comprehensive Plan Map is a key element of the Comprehensive Plan and a controlling instrument that directs future growth by illustrating the location and types of uses within Sandy. The Comprehensive Plan Map includes land use designations establishing the intended urban pattern and the general use and intensity of development, as well as land use boundaries illustrating the Urban Growth Boundary (UGB), City limits, and community plan areas.

Zoning districts, which must be consistent with the Comprehensive Plan, translate the broad land use designations as defined in the Comprehensive Plan into detailed land use classifications that are applied to individual parcels. A clear relationship between land use designations and zoning districts is important to ensure that the goals and policies of the Comprehensive Plan are consistently carried out through administration of the City Development Code and corresponding Zoning Map.





PLEASE NOTE: Zoning designations for all parcels located outside of the City Limits are conceptual only and non-binding. The conceptual zoning designations are used to promote preferred development patterns, per the Envision Sandy 2050 Comprehensive Plan.



## Central Business District

The Central Business (C-1) district is intended to provide the community with a mix of civic, retail, personal services, offices and residential needs of the community in the city’s historic commercial core. While the district does not permit new low density housing types, the district allows dwelling units in buildings containing commercial activities.

The district is smaller, more intimate, and is intended to be pedestrian oriented. Vehicular parking is mostly provided on the street, in smaller parking lots, and in public parking lots. The goal is to continue to develop this district into a high-quality streetscape that provides a safe and

comfortable pedestrian experience. The central business district also provides the backdrop for some of the most significant community events.

The city has design standards effective for all commercial buildings. Known as the “Sandy Style,” the design guidelines apply to new construction, major additions, and exterior alterations other than general maintenance. Sandy Style is an architectural style developed by the City of Sandy, modeled after the Cascadian Architectural style by adapting elements of the English Arts and Crafts and Oregon Rustic styles.





## General Commercial

The General Commercial (C-2) district is intended to provide for a wide range of commercial activities at a community shopping center scale, including for commercial uses and businesses which require large land areas for structures, parking facilities, and direct automobile access.

This highway oriented commercial use dominates the experience for people passing through the west end of Sandy. This development pattern in Sandy was historically of the typical “big box” and “strip mall” variety, with buildings setback from the highway to make space for ample surface parking lots.

This type of development provides space for retail shopping and restaurants serving many of the daily needs and services of Sandy residents. Sandy Style design is required for all new construction and redevelopment of property in this district, including modifications to the historic development pattern to reduce the visibility of surface parking lots.

The established general commercial district creates barriers to pedestrian and bicycle access. The goals and policies reflected in this Comprehensive Plan support bike and pedestrian pathways to these areas, and safe crossings along various points of Highway 26.





## Village Commercial

The Village Commercial (C-3) district is primarily designed to serve residents of the immediately surrounding residential area. Village Commercial is intended to help form the core of the villages designated in different locations of Sandy. The village district was designed and implemented concurrently with the 2040 Comprehensive Plan that was adopted in 1997. Allowing a mixture of residential uses beside and/or above commercial uses is intended to help create a mixed-use environment which integrates uses harmoniously and provides for convenient access to commercial uses close to housing.

The orientation of the uses in this zoning district should integrate pedestrian access and provide linkages to adjacent residential areas, plazas and/or parks, and other amenities. The village designation is intended to provide flexibility in developing specific area plans. Permitted land use designations in a village district includes low density residential, medium density residential, high density residential, and village commercial.





## Industrial Park

The Industrial Park (I-1) district is intended to allow desirable and beneficial mixing of light industrial and commercial uses totally enclosed within buildings on large landscaped sites that blend harmoniously with their surroundings and adjacent land uses. This zone closely matches the General Commercial (C-2) district.

Commercial uses located in this district include activities that are compatible with industrial uses, those uses which supplement and support

surrounding industrial activity and uses that support the needs of the employees of nearby businesses.

This land use category is intended to promote development that provides jobs in key industries in Sandy as identified by the City's Economic Development Strategic Plan. The land use pattern typically includes small and medium-sized parcels that can accommodate small and mid-sized industrial and commercial businesses.





## Light Industrial

The Light Industrial (I-2) district is intended to provide locations for light manufacturing and warehousing business which have minimal impact on their surroundings and do not produce noise, light, smoke, odor, or other pollutants in excess of average levels preexisting at the boundary of the site.

Light Industrial is intended for a variety of lower intensity industrial operations, such as light manufacturing and assembly, research,

technology, and industrial offices. Additionally, a goal of the district is to provide opportunities for incubator space for smaller start-up businesses.

Because building design standards are less restrictive in this zone than in other zones, buildings (regardless of use) shall be screened from view from arterial streets and highways. It is the intent of this district to provide locations and uses that do not depend on high visibility.





## General Industrial

The General Industrial (I-3) district is intended to provide locations for higher intensity industrial uses, such as manufacturing, major assembly of products, truck terminals, distributions facilities, and other similar uses. Because of the type of land uses and their potential conflicts, this

zoning district is intended to include larger sites that are typically more isolated and removed from residential uses. The entirety of this land use type is currently located in the northwestern part of the city, adjacent to Highway 26.



Images: US Metal Works Inc



## High Density Residential

The High Density Residential (R-3) district is intended for high density residential development at 10 to 20 dwelling units per net acre. Intended uses are apartments, row houses, duplexes, single attached zero lot line, and manufactured dwelling parks.

Grouping of homes are typically closer together and usually in multi-story buildings. Common open spaces and interior parks are often required to provide room for play and recreation.

High Density Residential (HDR) areas are generally located immediately adjacent to commercial zoning, arterial and collector streets, and public facilities such as schools or parks. The HDR Comprehensive Plan designation encompasses one zoning district designation.





## Medium Density Residential

The Medium Density Residential (R-2) district is intended primarily for medium density residential development at 8 to 14 dwelling units per net acre. Intended uses are apartments, duplexes, row houses, manufactured dwelling parks, and single family detached and attached residential dwellings. Commercial development, with the exception of home businesses and other uses as defined as conditional uses, is not considered appropriate for this designation.

Medium Density Residential (MDR) districts are often used as a transitional use technique to buffer HDR to low density residential uses. Lots for single family homes and duplexes are typically smaller than in the low-density residential designation and homes are located somewhat closer to each other. The resulting neighborhood character is still decidedly suburban. The MDR Comprehensive Plan designation encompasses one zoning district designation.





## Low Density Residential and Single Family Residential

The Low Density Residential (R-1) district is intended for 5 to 8 dwelling units per net acre. Intended uses are duplexes, manufactured dwelling parks, and single family detached and attached residential dwellings. The Single Family Residential (SFR) district is intended for 3 to 5.8 dwelling units per net acre. Intended uses are duplexes and single family detached residential dwellings. Low Density Residential (LDR) districts are typically located outside on the periphery of the commercial districts and have a traditional neighborhood design with various architectural styles and building elements. All future residential development should be carefully designed to integrate with

established neighborhoods in terms of density and house design.

Street patterns in the LDR district are characterized by curvilinear alignments and cul-de-sacs because of the topography in Sandy. The public streetscape is a major defining element of an LDR district neighborhood. This land use designation relies on the car for most trips, and on the school bus for getting to and from school. This development pattern remains popular with families in Sandy for the generously sized private yards and quiet streets. The LDR Comprehensive Plan designation encompasses two zoning district designations.





## Parks and Open Space

This designation is intended to recognize those publicly owned lands designated or proposed for parks and open spaces as identified in the Parks and Open Space Master Plan. Parks and Open Space (POS) include publicly developed parks and undeveloped park land where typical uses include active and passive outdoor recreation activities, trails, open space, cultural activities, park buildings and structures, concessions, general park operations and maintenance, and storm drainage facilities. Open space includes publicly developed and undeveloped lands and sensitive areas such as wetlands, steep slopes, forested areas, and stream corridors.

Natural open space is a key element of the form and character of Sandy. As described in the landform analysis, Sandy neighborhoods are nestled between creeks, wetlands, and steep slopes with forest. Several creeks in Sandy have carved out corridors that are filled with lush vegetation. Most of these corridors are accessible through a vast network of trails. Access to nature is one of the key elements in the unique quality of life in Sandy.







## Sandy Style

On April 2, 2008, the City of Sandy adopted design standards effective for all commercial, industrial park, and non-residential (school, church, and civic) buildings. Known as the “Sandy Style,” the design guidelines apply to new construction, major additions, and exterior alterations other than general maintenance. Note that some buildings, such as Joe’s Donuts and Tollgate Inn, are exempt from the Sandy Style requirements due to their historical and cultural significance.



Sandy Style is an architectural style developed by the City of Sandy, modeled after the Cascadian Architectural style by adapting elements of the English Arts and Crafts and Oregon Rustic styles.

The intent of the new standards is not to require all buildings to look the same, but rather to require buildings to contain certain design elements in common to create a more unified overall appearance. Some elements of the style include:

- Steeply pitched roofs and gables.
- Strong base materials using stone, block, or brick.
- Exposed heavy timbers or natural wood beams, posts, and trim.
- Warm earth-tone paint colors and/or brick.
- Articulated building facades with prominent covered entries.
- Windows to allow viewing into the building.
- Public gathering spaces.
- Pedestrian focused site layout, parking, and vehicle access.



## Facade Improvement Grants

The City of Sandy Façade Improvement Program is a matching grant program funded by the Sandy Urban Renewal Agency and was approved by the Urban Renewal Board in May 2009. This program sets aside a portion of the City's urban renewal funds to assist building owners with upgrades to their buildings designed to incorporate Sandy Style elements to buildings.

## Permanent Covered Structures Grant

The Permanent Covered Structures grant program was a subsection of the Façade Improvement Grant Program, a grant program offered by the City of Sandy Urban Renewal Agency. Additional outdoor seating in Sandy had been a desired amenity for many years and this program was introduced during the



2020 pandemic as a way to help businesses when inside seating was limited. The Urban Renewal Agency provided 100 percent of the upfront funding to construct the permanent outdoor covered structures and applicants only had to pay back 20 percent of the construction costs.





SANDY COMPREHENSIVE PLAN  
**ENVISION SANDY 2050**  
**VISION STATEMENT**



# Envision Sandy 2050 Vision Statement



## Community and Culture

In 2050, Sandy retains its small-town feel through a celebration of community and place. Downtown Sandy is a clean, walkable, and vibrant place to dine, shop, and gather. The beautification of downtown showcases public art, honors Sandy's history, and celebrates its location as "The Gateway to Mt. Hood." Public amenities and facilities provide places to play, grow, and learn for residents of all ages. Sandy supports events like the Sandy Mountain Festival that bring people together and promote a spirit of inclusivity. Non-profit and volunteer organizations offer meaningful services to the community and provide opportunities for civic engagement.



## Transportation and Infrastructure

In 2050, Sandy boasts modern and reliable public facilities and services that support carefully planned growth. The City invests in infrastructure that provides clean drinking water, treats wastewater while protecting our watersheds, and mitigates the effects of stormwater runoff. The expansion, operation, and maintenance of public services is supported through sustainable and balanced funding sources. SandyNet continues to provide reliable, fast and state-of-the-art internet service to the City's residents. Sandy's transportation system prioritizes safety, connectivity, and accessibility, with an emphasis on local street connections to reduce reliance on arterial roads such as Highways 26 and 211 for local trips. Safe, efficient, high-quality transit service, as well as a network of sidewalks and bike facilities, provides an alternative to private automobile use, supporting efficient use of roadways and reducing air pollution and energy use.



## Natural Hazards and Resiliency

In 2050, Sandy is resilient in the face of natural hazards. As stewards of clean air, water, and land resources for future generations, Sandy guides the design of the built environment to protect, enhance, and be integrated with natural systems. The threat of natural hazards like wildfire and earthquakes is mitigated through emergency preparedness, education, and proactive planning. Sandy collaborates with local agencies, including Fire Districts, Clackamas County, and regional partners to plan for actions that can lessen the impact of natural hazards, ensuring the City and its partners have long-term strategies for protecting the community.



## Parks, Trails and Natural Resources

In 2050, Sandy's natural and scenic landscape is an extension of the community. Clean rivers, healthy trees, and wildlife habitats are carefully conserved to promote biodiversity. Forested areas within the City are protected as parks, trails and natural open space. Sandy preserves the unique character and charm of beloved assets like Meinig Memorial Park, Sandy River Park, the Tickle Creek Trail, and Jonsrud Viewpoint. The City continues to develop recreation programs and a diverse and accessible park and trail system that is clean, safe, and functional, serving the needs of residents.



## Governance and Growth Management

In 2050, Sandy is proactive in managing and planning for growth. Sandy is an innovative community that addresses change through thoughtful planning and effective governance. Growth and development are guided by community values, fiscal responsibility, and strategic investments in services and infrastructure. Premier fire, police and emergency response services ensure safety for residents. Regulatory tools and practices are consistently updated to address new issues, and new development contributes to the expansion of public utilities. Leadership and residents engage with one another in decision-making processes so new opportunities benefit the community while preserving Sandy's small-town feel.









## Economy & Housing

In 2050, Sandy is home to desirable neighborhoods and a strong workforce. Thriving commercial and industrial districts provide balanced employment opportunities at all levels. A variety of businesses meet the daily needs of residents and contribute to Sandy's sense of place. A strong tourism industry provides opportunities for businesses and supports the local economy. Sandy's workers have access to a variety of housing choices that allow residents to move in, move up or age in place, ensuring families can live, work, and thrive in Sandy across multiple generations. Balanced housing choices contribute to safe, walkable, family-friendly neighborhoods that connect residents to nearby parks, trails, businesses and key destinations.

# Organization of Envision Sandy 2050 Vision Themes to Comprehensive Plan Chapters

The Envision Sandy 2050 Vision Statement provides a framework for the Comprehensive Plan. Each chapter of the Comprehensive Plan is organized by the thematic areas of the vision. The table below identifies the applicable statewide planning goals for each theme.

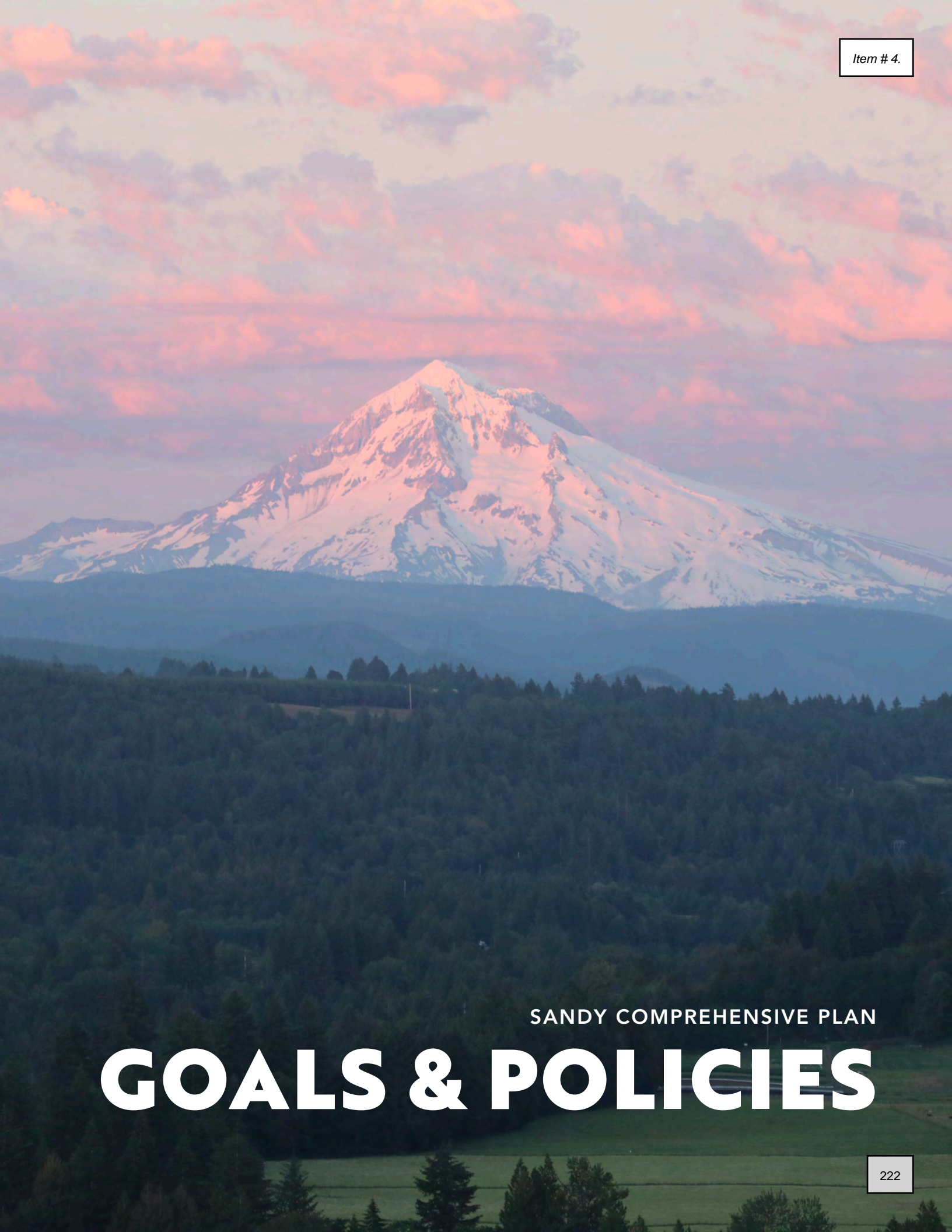
Vision Theme/Comprehensive Plan Chapter	Applicable Statewide Planning Goals
 <b>Community and Culture</b>	Goal 1: Citizen Involvement Goal 5: Cultural and Historic Resources
 <b>Transportation and Infrastructure</b>	Goal 12: Transportation Goal 11: Public Facilities and Services Goal 13: Energy Conservation
 <b>Parks, Trails and Natural Resources</b>	Goal 8: Recreational Needs Goal 5: Natural Resources and Open Space
 <b>Natural Hazards and Resiliency</b>	Goal 7: Natural Hazards Goal 6: Air, Water and Land Resource Quality Goal 13: Energy Conservation
 <b>Housing and Economy</b>	Goal 9 Economic Development Goal 10: Housing
 <b>Governance and Growth Management</b>	Goal 14: Urbanization Goal 2: Land Use Planning Goal 1: Citizen Involvement

Some statewide planning goals are repeated given their applicability to more than one Vision Theme.









SANDY COMPREHENSIVE PLAN

# GOALS & POLICIES





# COMMUNITY & CULTURE





# BACKGROUND

## PUBLIC INVOLVEMENT

The Sandy Development Services Department, which includes the Planning Division and Building Division, conducts numerous public involvement activities including:

- Public notification of land use applications. ORS 197 dictates Land Use notification requirements that includes the following: notice to adjacent parcels, publication in a local newspaper, site posting, and posting in public locations.
- Meetings and events for various planning projects, including the formation of community advisory committees and outreach activities catered to the specific needs of the project.
- Providing public information available at the counter, on the City's website, and on social media.
- Conducting research and producing reports to understand how the city is growing and how to involve the public in guiding that growth.

### City Council

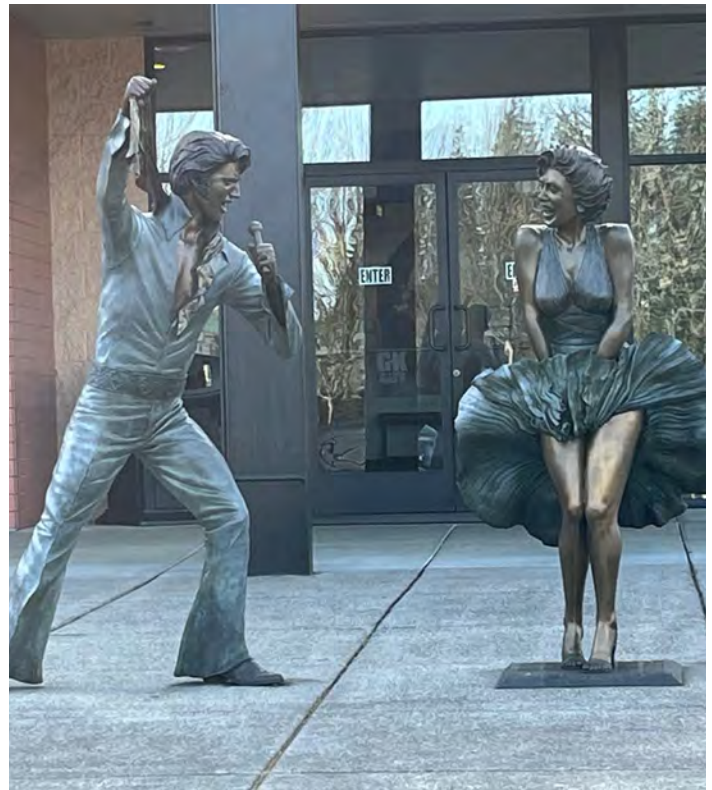
The Council consists of the mayor and six City Council members. City voters elect council members. The mayor serves a two-year term, and the Council members serve four-year terms. Sandy uses a "council-manager" form of government. The City Council members are unpaid volunteers who typically hold full-time jobs. They are responsible for city policies, legislation, and budget. The City Council appoints the city manager, who has the responsibility of day-to-day operation of the city.

### Planning Commission

The Sandy Planning Commission is a volunteer body of seven Sandy residents and/or business owners that "advises the City Council on long-range, comprehensive planning, and land use issues within city limits." The Planning Commission reviews all amendments and updates to the Comprehensive Plan, recommends policy direction for land use rules and regulations, and helps City staff ensure that Sandy is aligning within the framework of Oregon's land use goals.

## VOLUNTEERING

Sandy offers a variety of community engagement opportunities, primarily through volunteer activities. Places to volunteer include the Sandy Senior Center, Sandy Community Action Center, Sandy Chamber of Commerce, Friends of the Sandy Library, and the Sandy Historical Society. The youth of Sandy are encouraged to volunteer with the Sandy Actors Theater, AntFarm Youth Services, and the Sandy Public Library. The City also offers seasonal event volunteering opportunities as well as at the Christmas Tree Lighting Ceremony.



## PUBLIC, CIVIC, AND CULTURAL SPACES

There are few regulations which govern the provision of public, civic, and cultural spaces from a land use planning perspective. This includes education, arts, government, civic and cultural centers, of which these facilities are not addressed in statewide planning goals. Other public facilities, such as police and fire services, utilities, and infrastructure (transportation, water, sanitary sewer, stormwater) are mandated by Statewide Planning Goal 11: Public Facilities and Services and discussed in separate background reports. However, many of these public, civic, and cultural facilities are planned for as best practice through infrastructure master plans, community concept plans, and transportation system plans.

Education facilities are an exception as school districts are required by the state to create a school facility plan covering a period of at least 10 years. School facility plans must include identification of desirable school sites, financial plans to meet school needs, site acquisition schedules, and an analysis of land supply within the UGB that is suitable for school facilities. Should the analysis conclude that an inadequate land supply exists within the UGB, the school district, in coordination with affected jurisdictions, is required to identify and take the necessary actions to remedy the deficiency.

Sandy owns and operates many government buildings and civic facilities, and is home to many more community, cultural, and arts facilities outside of those spaces which the City owns or operates. In addition, the community benefits from other public and private amenities, as well as events, festivals, and activities that lend to the quality of life and sense of community. Popular community events include the Mountain Festival, SOLVE Sandy, Noah's Quest Benefit Walk, Longest Day Parkway, Summer Sounds & Movies in the Park, Corn Cross Mountain Bike Race, Winterfest, and a Holiday Tree Lighting event.



Key civic, arts, and cultural spaces include, but are not limited to, the following:

- **Sandy Senior Center** – provides activities and services for adults 60 years and above. This includes meals, health-related clinics, help with medical insurance, and exercise classes.
- **Sandy Public Library** – supported by Friends of Sandy Library; a volunteer organization dedicated to the long-term needs of the library.
- **Sandy Community Action Center** – a hunger relief agency that serves residents of the Oregon Trail School District. Funded by donations and operated by a volunteer Board of Directions and professional staff.
- **AntFarm Youth Services** – a nonprofit organization that provides work skills for youth. Additionally, they host an educational assistance center, a learning garden, senior citizen services, arts classes, and recreation programs.
- **Sandy Actors Theater** – a nonprofit 501(c)(3) community theater, whose mission is to develop and nurture interest in theater by providing affordable, live theater performances, mentoring and workshops. SAT provides opportunities to participate in all aspects of community theater for all ages, from business to acting to production.
- **Sandy Historical Museum** – The museum was constructed in 2007 and is placed directly on the Oregon Trail. Home of the Sandy Historical Society since 1926, the museum is the key to preserving Sandy’s history through artifacts and information collection. A Downtown Historical Walking Tour stops by key historical sites found in Sandy.

Sandy residents find a sense of community through many mediums and across a variety of gathering spaces, like parks, sports fields, churches, coffee shops, etc. across the city.



Public art commemorating Sandy's history



Sandy Actors Theater



Sandy Historical Museum



## Community Events

The second week of every July marks the Sandy Mountain Festival. The festivities kick off with a popular parade through downtown Sandy, and events throughout the weekend include a large arts & crafts sale in Meinig Park, concerts in Centennial Plaza, a carnival, and more. Sandy also hosts a popular Winterfest event every holiday season, which includes lights and decorations in Meinig Park, neighborhood trolley rides, a tree lighting ceremony, and more.



Mountain Festival



Sandy Winterfest





## Community Garden

Nestled within Bornstedt Village is a master planned park with proposed ballfields, paths, a playground, a splash pad, and community garden boxes. Bornstedt Park is home to a Community Garden where you can reserve up to two raised garden beds (if space is available). There are Sixty-nine (69) garden beds available for rental every year. Sixty-seven (67) of the garden beds are 4 foot by 8 foot and there are even two ADA accessible garden beds.







## FUTURE TRENDS AND DRIVERS OF CHANGE

### PUBLIC INVOLVEMENT

The face of public involvement is changing rapidly as technology and demographics are shifting. Technology plays a critical role in engagement, and as COVID-19 forced a pivot to virtual platforms, Sandy has sought to extend the capabilities of their online presence by integrating more interactive tools, such as discussion forums, online surveys, interactive maps, and more multilingual content. Expanding the technical capacity of the City's various departments is also critical to sustaining youth engagement. Harnessing the participation of youth leaders in the governance process could lend an important and innovative perspective to existing public involvement efforts.

Other key opportunities and trends around the practice of public involvement by jurisdictions includes:

- **Collaborative Community Engagement.**

Local governments are beginning to turn to a more collaborative approach to community engagement, particularly for projects that need to focus on outreach to historically underrepresented communities in order to be successful, or where the broadest possible involvement throughout a community is

desired. In a collaborative arrangement, the City partners with existing organizations performing outreach to the target communities, providing subject-matter expertise, resources, and sometimes even funding to the partner organization, who then coordinates the outreach activities.



- Youth Engagement.** There are over 1,400 high school students enrolled at Sandy High School. Harnessing the participation of youth leaders on project-based and standing advisory committees, or even in governing bodies themselves, could lend an important and innovative perspective to existing public involvement efforts. Some cities have included youth-specific events and materials in their public involvement for long-term planning projects, including working with local schools to engage students and their families about cities and community planning. Other cities have expanded youth participation beyond project-based engagement and into the governing bodies themselves, in both voting and advisory capacities.
- Web and Mobile Technologies.** Sandy, like most cities, maintains a website to provide access to meeting agendas, ordinances, application forms, maps, and other information. While the City website is well-used, offering enhanced web services bolsters communication, community engagement, public information, and innovation. Cities seeking to extend the capabilities of their

websites have also integrated more interactive tools such as games and discussion forums, online surveys, streaming video of meetings or other presentations, and multilingual content.

- Open Data and Civic Technology.** Open data multiplies the effectiveness of the City’s technology investment by enabling interested community members to use City public data to build new tools and applications that can address issues in the community. These grassroots public-private partnerships with “civic technologists” can yield innovative and scalable solutions that the City is unlikely to be able to efficiently implement on its own. Data sets could include land use applications, natural resource inventory information or long-range plan data. City departments may also publish data that it is already collecting internally – population growth, demographics, and development history are just some examples.



## PUBLIC, CIVIC, AND CULTURAL SPACES

- Service Planning and Delivery.** With an array of special districts, private franchises, and various service providers, the City must ensure effective collaboration and planning. Many facilities, utilities, and services are subject to state and federal regulations and must maintain compliance with these requirements. The City can benefit from collaborative planning between various infrastructure service providers for new and expanding civic, institutional, and cultural services. Colocation of infrastructure and facilities, such as underutilized school fields being made available to the public through a park department, can increase capacity and address the need for more civic and community facilities.
- School District Coordination.** Coordination between the City and Oregon Trail School District is critical to successful facilities planning. Procedures should be implemented to allow the school district to become aware of large developments which may impact school capacity and/or provide opportunities for siting new school facilities. The City also should consider the location of actual or planned major capital investments by the school district when making its own infrastructure investments in order to complement and leverage these projects. To keep up with projected increases in enrollment numbers, coupled with rising land costs, school districts may need to employ new approaches. For example, they may find it necessary to reevaluate assumptions about space and land needs, education delivery methods, and district/agency partnerships. The City should be prepared to assist school districts in planning for new and expanded facilities as needed, including long-term forecasting, evaluating UGB expansion options, and creating detailed growth strategies.
- Expanding the scope of a Public Facilities Plan.** Although the state requires only a select set of public services to be addressed in a Public Facilities Plan (PFP), the City may choose to expand the scope to include others such as schools, parks, library, and civic buildings for better service planning and delivery. The City may consider developing the PFP as a tool to align community goals with future investments and as a means to balance maintenance with new construction needs.
- Demand for flexible community space.** There is anticipated continued demand for working and gathering space in the community. For example, the role of the library as a community gathering space is even more essential as the ability to access information online increases. Both in Sandy and in communities across the country, libraries remain a key place for community members to meet, work, and connect. As telecommuting becomes a way of life for workers in Sandy, key community spaces like the library may consider capturing that interest and expand services to include dedicated work desks and study space.







## Community and Culture GOALS AND POLICIES

**In 2050, Sandy retains its small-town feel through a celebration of community and place.** Downtown Sandy is a clean, walkable, and vibrant place to dine, shop, and gather. The beautification of downtown showcases public art, honors Sandy's history, and celebrates its location as "The Gateway to Mt. Hood." Public amenities and facilities provide places to play, grow, and learn for residents of all ages. Sandy supports events like the Sandy Mountain Festival that bring people together and promote a spirit of inclusivity. Non-profit and volunteer organizations offer meaningful services to the community and provide opportunities for civic engagement.

# COMMUNITY

## Civic Engagement

**GOAL 1: Implement and maintain a culture of public involvement by providing a broad array of inclusive engagement opportunities for all Sandy community members.**

**Policy 1.1** Support the Planning Commission as the lead body responsible for facilitating community involvement in the land use planning process.

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**Policy 1.2** Provide information and public notice to the residents of Sandy regarding land use projects and processes in transparent, easy-to-understand formats, including multiple languages where appropriate.

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**Policy 1.3** Continue to monitor and improve the City's website and engagement platforms to provide access to information, services, news, and databases.

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**Policy 1.4** Promote Sandy's network of service and volunteer-based organizations, clubs, and groups.

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**Policy 1.5** Seek opportunities to develop and enhance relationships with community-based organizations working in Sandy and the region.

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**Policy 1.6** Create opportunities for youth to be engaged in civic affairs and public decision-making processes through advisory boards, committees, and other activities.

## Public Amenities and Facilities

**GOAL 2: Provide public amenities and facilities to help meet the education, recreation, and civic use needs of the community.**

**Policy 2.1** Coordinate the siting of public facilities and services with other agencies or districts such as the fire district, post office, school district, and other partner agencies.

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- Policy 2.2** Collaborate with private and public entities such as schools, businesses, and recreation providers to facilitate the co-location of community facilities, especially in underserved neighborhoods.
- Policy 2.3** Provide City services for senior activities and programming.
- Policy 2.4** Pursue the development of a new aquatic facility and community center for Sandy area residents of all ages.
- Policy 2.5** Work with Clackamas County to expand library services, programs, and facilities to meet the needs of the Sandy and Hoodland Library Service Area.

# CULTURE

## History and Heritage

### GOAL 3: Honor Sandy’s history and heritage through the public realm.

- Policy 3.1** Inventory, preserve, and enhance distinctive historical and cultural features to create a sense of place and reflect Sandy’s heritage.
- Policy 3.2** Apply baseline protections from demolition or relocation of National Register sites and resources, per state requirement.
- Policy 3.3** If archaeological sites are identified in the City, coordinate with the State Historic Preservation Office in establishing a review procedure that meets state requirements.
- Policy 3.4** Utilize the City’s Urban Renewal Plan and programs to implement targeted improvements that encourage private investment, preserve and enhance historical and cultural elements of the built environment, and increase prosperity and vitality in Sandy’s downtown and surrounding commercial areas.

**Policy 3.5** Improve the physical characteristics of Downtown Sandy to reflect its history and character through installation of wayfinding signage, gateway elements, public art, lighting, street furniture, and other treatments.

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**Policy 3.6** Develop long-term strategies and plans to cultivate art in Sandy and encourage donations, grants, and other support to expand access to the arts in the community.

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**Policy 3.7** Support City events, activities, and festivals to promote a sense of community among Sandy residents and businesses.





# TRANSPORTATION & INFRASTRUCTURE







# CURRENT ASSETS, PRACTICES AND CONDITIONS

## PUBLIC UTILITIES AND SERVICES

### Water

The City of Sandy has three water sources. The City's primary drinking water source is Alder Creek (a small tributary of the Sandy River). This is supplemented with water purchased from the Portland Water Bureau, which is critical to meet demand during drier months, and which also provides important system redundancy in case of emergencies. The City is constructing a new transmission line to the Portland Water Bureau's planned filtration facility to ensure ongoing access to this resource. The remainder of the City's supply comes from Brownell Springs (a city-owned natural spring on Lenhart Butte).

### Wastewater

Sandy's sanitary sewage is treated at a plant off Jarl Road. Sandy currently operates under a permit issued by the Oregon Department of Environmental Quality (DEQ) to discharge its treated wastewater, or effluent, into Tickle Creek, a tributary of the Clackamas River that runs just west and south of town. The permit limits not only the volumes of those discharges but also when they can occur—only between November and April. During the summer, Sandy's treated wastewater is sent to a nearby nursery for irrigation use. The existing treatment plant was placed into service in 1998.

The City’s Wastewater System Facilities Plan contains recommendations for facility improvements to accommodate population growth and regulatory requirements. In 2021, the City embarked on an expansive overhaul of its wastewater system called Sandy Clean Waters. The multi-year project will reduce peak flows by relining and replacing miles of mainline and lateral line piping, along with expanding the capacity of the treatment plant through improvements and new facility construction.

**Stormwater**

The City of Sandy manages stormwater in order to reduce runoff and thereby reduce capital and maintenance costs to the City and improve the water quality of streams in and around Sandy. The City last updated its Stormwater Management Plan in 2001. The City requires all new developments to treat and detain stormwater from the 2, 5, 10, and 25-year storm events to pre-development conditions, as prescribed by the City of Portland Stormwater Management Manual and in the City’s Development Code. In addition, the City administers an incentive plan to encourage property owners to reduce or mitigate for impervious pavement on commercial, industrial, and multi-family residential properties.

**Additional Services**

The City of Sandy is one of a few cities in the state that provides broadband service as a public utility. SandyNet is owned by the citizens of Sandy with the purpose of closing the digital divide as well as fostering economic growth. SandyNet operates as a fiber-to-the-x (FTTX) where fiber is used to provide voice and data to

homes, businesses, and city infrastructure. Fixed wireless systems are used outside of city limits to provide broadband service to those outside of SandyNet’s fiber footprint, covering various locations throughout the rural Sandy/Boring area.



*SandyNet*





## Police & Fire

The Sandy Police Department manages criminal investigations, traffic control/enforcement, and school resource functions. In addition to the Police Chief, current staffing consists of one lieutenant, two sergeants, eight patrol officers, one traffic officer, and two School Resource officers. Additional programs run by the department include:

- **Gunlocks** – a program to help facilitate responsible gun ownership by providing gunlocks free of charge to anyone who requests them.
- **Unwanted Firearms and Ammunitions** – a collection service to offer the acceptance of firearms and ammunition for proper disposal.

The City of Sandy is serviced by the Sandy Fire District No. 72 (which contracts with Clackamas Fire District) to protect the City of Sandy as well as 77 square miles of rural area.

The district provides fire protection, emergency medical service, fire prevention, and fire investigation services. The district also offers additional community programs such as:

- **PulsePoint** – a large system in which Sandy participates that allows citizens to provide life-saving assistance to victims of sudden cardiac arrest through a mobile app.
- **First-Aid Classes** – a 5-hour course that covers general first aid and adult CPR.
- **Child Safety Seats** – an inspection program to educate parents on proper installation of car seats.
- **Helmet Program** – helmets for all sports, with proper type and fitting at the main station.

## TRANSPORTATION SYSTEM

Sandy is bifurcated by US 26, which serves as a major east/west transportation and freight route between the Portland Metro Area, Mt. Hood, and Central Oregon resorts and recreation. The highway also serves as the City's "main street" through the downtown couplet of Pioneer and Proctor Boulevards. Pioneer and Proctor Boulevards, from Bluff Road to Ten Eyck Road, are home to local businesses as well as civic and community spaces, and connect parks to residential areas.

A majority of the households in Sandy are south of US 26 where there is good connectivity between areas provided by the minor arterials and collectors that intersect with Dubarko Road, the main east-west arterial. The newer residential areas west of Bluff Road have good local street connectivity but are relatively isolated from the rest of the city. Bluff Road is currently the only north-south street in the city that connects the north and south neighborhoods.

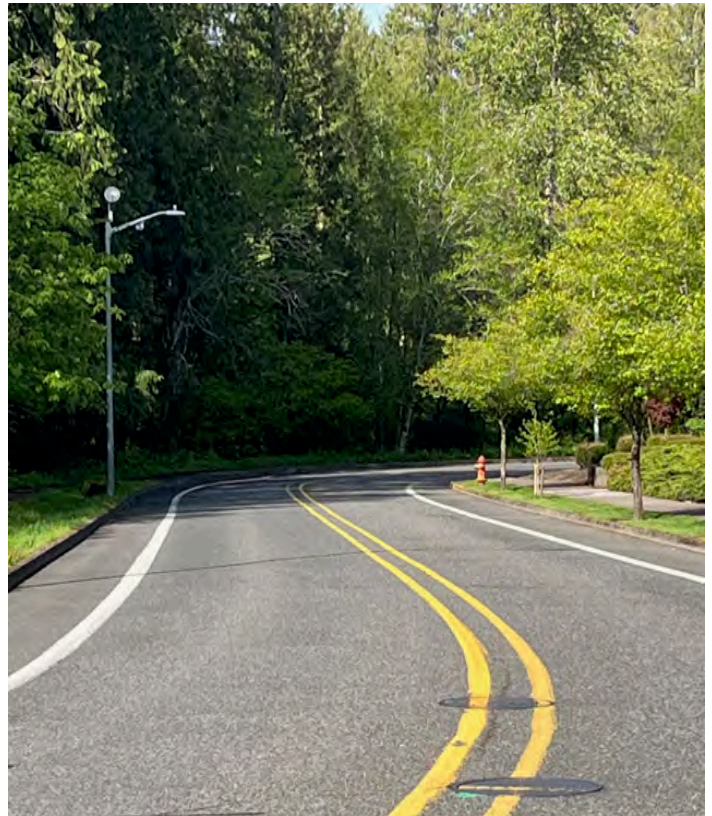
### Sidewalk Network

The existing pedestrian network in Sandy is composed of sidewalks, paved paths and unpaved trails, and is fairly well developed. Most local streets in Sandy were developed with sidewalks incorporated into the design. Although many areas have sidewalk coverage, a few do not have complete sidewalks on one side of the street, or even on both sides. Based on the City of Sandy's 2022 Transportation System Plan (TSP), these gaps are most significant along the following roads:

- US 26 east of SE Ten Eyck Road/Wolf Drive – On some stretches of highway, particularly in rural areas, wide shoulders provide a substitute for sidewalks. On this segment, eight feet is the minimum appropriate shoulder width. The existing shoulders range between five and seven feet wide.
- Meinig Avenue between Barker Court and OR 211 – Pedestrians in the southeastern residential area destined for the central business district of Sandy must use Wolf Drive or OR 211 via Meinig Avenue. For households, where Meinig Avenue provides a more direct connection the only way to avoid walking in the road is to detour through Meinig Memorial Park.
- Sandy Heights Street between Nettie Connet Drive and Tupper Road – Most of this segment has sidewalks on at least one side of the street. Because Sandy Heights Street is the only east-west connection from Meinig Avenue to Dubarko Road that provides pedestrian access to the commercial area on the west side of the city, connected sidewalks are prioritized for this segment.







## Bicycle Network

The bicycle network in Sandy is composed of bike lanes, roadway shoulders, shared roadways, and bicycle paths.

- Bike lanes are portions of the roadway designated specifically for bicycle travel via a striped lane and pavement stencils. In Sandy, significant segments of continuous bicycle lanes exist along US 26, Bluff Road, Bell Street, Jewelberry Avenue, and Dubarko Road. In downtown Sandy, there are narrow parking lanes along US 26 (Proctor Boulevard and Pioneer Boulevard) which result in parked cars partially blocking the bike lane and pushing cyclists into the vehicle lane.
- Shoulder bikeways are paved with striped shoulders wide enough for bicycle travel. The bike lane along US 26 in Sandy could be considered a shoulder bikeway west of Champion Way due to the lack of pavement markings.
- Shared roadways include those on which bicyclists and motorists share the same travel lane. Most local roadways in the City are considered shared roadways, but do not have signs or pavement markings distinguishing them as sharrows.
- Bicycle paths can serve both recreational and transportation needs. They include shared use paths, which allow for citywide pedestrian and bicycle travel, and short path segments providing accessways between disconnected streets or localized recreational biking opportunities. They can be separated or adjacent to the street's right-of-way and provide linear park facilities for bicycle travel.





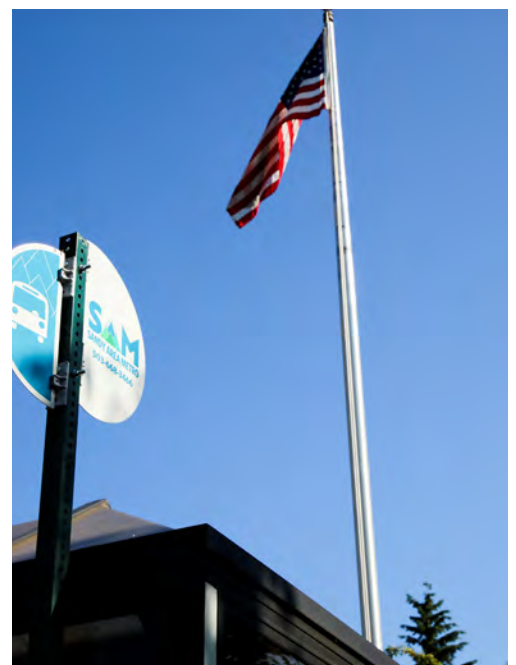
## Transit Network

Sandy Area Metro (SAM) provides transit service in Sandy via four fixed bus routes including two local shopper routes and two regional routes connecting the City with downtown Gresham and Estacada. Clackamas County operates an additional fixed route service to multiple outdoor recreation and visitor destinations on Mount Hood.

Sandy Transit’s SAM Rides is a dial-a-ride and paratransit service that provides public transportation to persons with disabilities who are unable to use regular fixed route buses and members of the general public. While federal guidelines require that service be provided within 3/4 mile of fixed route service, SAM Rides service is provided for any trip that starts and ends within three miles of Sandy’s Senior Center, free of cost. Demand for the service is high, and with 3.5 passengers per hour it is approaching the limit of what is physically possible for an on-demand service.

The City’s 2020 Transit Master Plan guides Sandy Transit’s major decisions and includes two hypothetical scenarios for three fiscal years referenced as the “Bloom” and “Gloom” scenarios. The Transit Master Plan emphasizes that the City of Sandy can support highly productive transit by placing dense and active land uses (such as apartments, schools, senior housing and medical services) in areas that are:

- Contiguous and proximate (rather than separated by low-density uses).
- On the way to other busy places, along major transit-operable streets (rather than at the ends of cul-de-sacs or loops).
- Walkable, with well-connected streets or paths.



# FUTURE TRENDS AND DRIVERS OF CHANGE

## PUBLIC UTILITIES AND SERVICES



### Water System

The City of Sandy's 2022 Water Master Plan provides updated information regarding water management and forecasted demand needs. Sandy is constructing a new transmission line to Portland Water Bureau's planned filtration facility to maintain compliance with EPA mandated treatment standards, which go into effect in the fall of 2027. (Portland's new facility will be located downstream of Sandy's current connection). Sandy's Alder Creek Water Treatment Plant is undergoing long overdue upgrades over the next few years to maximize Sandy's ability to keep up with water demands as Sandy grows.

### Wastewater System

In the recent past, Sandy's wastewater treatment plant was not able to consistently treat the high volume of sewage and stormwater that flows to the plant, especially during wet weather. This led to past violations of the City's permit to discharge to Tickle Creek. As part of a consent decree with the EPA, a development moratorium was put in place to ensure that demand on the wastewater system does not exceed its capacity; concurrently, an extensive capital improvement project called Sandy Clean Waters was launched to repair and expand the wastewater system to accommodate future growth. The work of Sandy Clean Waters includes rehabilitation of the collection system, improvements and expansion of the existing treatment plant, and pursuit of additional discharge options. Improving Sandy's wastewater system will be essential in meeting the future housing and economic needs of the community.



## Transportation

With continued population growth and increases in traffic flow, issues of safety, mobility, and accessibility will continue to affect pedestrians, drivers, and cyclists. The City’s 2022 TSP update identified several areas of focus and key deficiencies across the City’s transportation network:

### *Pedestrian Network*

Sidewalk gaps along Sandy Heights Street reflect poor east-west connections for the neighborhood south of US 26. Infill of these missing sidewalk gaps will improve the quality of the pedestrian network.

Sidewalk gaps along US 26 east of SE Ten Eyck Road isolate pedestrians in the Sandy Vista Apartments, sidewalk connecting the apartments with downtown Sandy is needed.



### *Bicycle Network*

Improved north-south and east-west connections are needed in the neighborhood south of US 26. Important connections without bike lanes or with gaps include Bluff Road, OR 211, Meinig Road, Sandy Heights Street, and Tupper Road.

Bicycle network gaps along US 26 east of SE Ten Eyck Road isolate people who bike from or to the Sandy Vista Apartments; bike lanes connecting the apartments with downtown Sandy are needed.

### *Transit Network*

Improved connections between the regional fixed route service and local fixed route service are needed to provide a better “last mile” connection for transit trips that start or end in Sandy.

The dial-a-ride/paratransit STAR system is approaching capacity and operational changes or additional vehicles will be needed to address that.



**Road Network**

Four intersections exceed mobility targets or have reoccurring safety issues.

- US 26 and Orient Drive – safety and mobility targets.
- US 26 and 362nd Drive – safety and mobility targets.
- US 26 and Ruben Lane – safety.
- OR 211 and Dubarko Road – safety.

With direction from Sandy City Council, the Public Works Department hired contracts to complete the northern expansion of 362nd Drive and the western extension of Bell Street. This project was completed in 2023 and will provide a needed connection from the northern neighborhoods of Sandy to the western edge of the commercial corridor.



**Transit**

Potential service and capital investments, as outlined in the 2020 Transit Master Plan, include additions to local services, such as adding fixed routes, expanding flexible services (such as additional STAR service), and acquiring electric buses.





## Transportation and Infrastructure GOALS AND POLICIES

**In 2050, Sandy boasts modern and reliable public facilities and services that support carefully planned growth.** The City invests in infrastructure that provides clean drinking water, treats wastewater while protecting our watersheds, and mitigates the effects of stormwater runoff. The expansion, operation, and maintenance of public services is supported through sustainable and balanced funding sources. SandyNet continues to provide reliable, fast and state-of-the-art internet service to the City's residents. Sandy's transportation system prioritizes safety, connectivity, and accessibility, with an emphasis on local street connections to reduce reliance on arterial roads such as Highways 26 and 211 for local trips. Safe, efficient, high-quality transit service, as well as a network of sidewalks and bike facilities, provides an alternative to private automobile use, supporting efficient use of roadways and reducing air pollution and energy use.



# TRANSPORTATION

## Mobility & Connectivity

**GOAL 4: Provide a transportation system that prioritizes mobility and connectivity for all users.**

**Policy 4.1** Maintain the livability of Sandy through well-connected transportation facilities.

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**Policy 4.2** Improve the safety and accessibility of transit amenities.

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**Policy 4.3** Improve the vehicular/pedestrian interface along all arterial and collector streets.

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**Policy 4.4** Ensure sufficient capacity to accommodate future travel demand (auto, transit, bicycle, pedestrian, etc.) to, within, and through the City of Sandy.

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**Policy 4.5** Emphasize local street connections and minimize access along the City's arterials to reduce reliance on US 26 and OR 211 for local trips.

## Capital Investments and Funding

**GOAL 5: Promote cost effective investments in the transportation system.**

**Policy 5.1** Optimize the use, performance, and value of existing facilities while planning for future infrastructure.

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**Policy 5.2** Seek opportunities to combine transportation, other infrastructure, and environmental mitigation projects.

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**Policy 5.3** Maximize the use of state and federal funds for transportation capital, operating, and service improvements.

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**Policy 5.4** Maintain a capital improvement plan that identifies construction priorities and funding.

## Community Needs

### GOAL 6: Provide a transportation system that supports specific community needs.

- Policy 6.1**      Coordinate the siting of public facilities and services with other agencies or districts such as the fire district, post office, school district, and other partner agencies.
- Policy 6.2**      Collaborate with private and public entities such as schools, businesses, and recreation providers to facilitate the co-location of community facilities, especially in underserved neighborhoods.
- Policy 6.3**      Provide City services for senior activities and programming.
- Policy 6.4**      Pursue the development of a new aquatic facility and community center for Sandy area residents of all ages.
- Policy 6.5**      Work with Clackamas County to expand library services, programs, and facilities to meet the needs of the Sandy and Hoodland Library Service Area.

## System Management

### GOAL 7: Promote traffic management to achieve the efficient use of transportation infrastructure.

- Policy 7.1**      Balance local access to US 26 with the need to serve regional and statewide traffic, while supporting adjacent land uses.
- Policy 7.2**      Plan for a transportation system that supports projected population and employment growth and maximizes travel options by providing efficient routes for all modes of transportation.
- Policy 7.3**      Coordinate with ODOT to ensure traffic signals, crossings and other Highway 26 infrastructure are designed to balance local and regional needs.

## Environmental

### GOAL 8: Minimize environmental impacts on natural resources and encourage carbon neutral or efficient transportation alternatives.

**Policy 8.1** Avoid or mitigate motorized transportation project impacts to environmental resources including creeks and wetlands, cultural resources, and wildlife corridors.

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**Policy 8.2** Support energy conservation by supporting public transit, transportation demand management, transportation system management, and a multi-modal transportation system.

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**Policy 8.3** Encourage transportation facility construction methods and green infrastructure to reduce environmental impacts.

## Transit

### GOAL 9: Provide safe, efficient, high-quality transit service that gives Sandy residents, businesses and visitors more freedom to meet their needs within the city, region, and state, and offers an alternative to private vehicle use to support efficient use of roadways and reduce air pollution and energy use.

**Policy 9.1** Provide service that is safe, comfortable, and useful for all users.

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**Policy 9.2** Collaborate with other transportation agencies and support user-friendly connections between transit systems.

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**Policy 9.3** Improve accessibility to transit services for people arriving by foot, bicycle, or with a mobility device.

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**Policy 9.4** Increase public awareness of Sandy Transit (SAM) and its connectivity to other transit systems and transportation modes.

## Safety

### GOAL 10: Promote a safe transportation system for all users.

**Policy 10.1** Encourage traffic safety through education, enforcement, and engineering.

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**Policy 10.2** Identify high accident locations and implement specific counter measures to reduce their occurrence.

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**Policy 10.3** Provide safe pedestrian and bicycle routes between residential areas, schools, and public facilities.

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**Policy 10.4** Provide transportation design standards that encourage appropriate traffic volumes, speeds, and pedestrian safety.

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**Policy 10.5** Improve emergency service response time and evacuation routes through connectivity.

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**Policy 10.6** Review, revise and adopt speed limits and other traffic calming approaches to ensure safer streets and neighborhoods.

## Equity

### GOAL 11: Support an equitable transportation system and provide transportation choices to all users.

**Policy 11.1** Ensure the transportation system provides equitable access to underserved, disadvantaged, and vulnerable populations and is easy to use and accommodating to travelers of all ages.

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**Policy 11.2** Ensure that pedestrian and bike facilities are designed clear of obstacles and obstructions (e.g., utility poles, grates) and meet ADA requirements.



## Health

### GOAL 12: Support options for exercise and healthy lifestyles to enhance the quality of life.

- Policy 12.1** Develop multi-use walking and biking routes to access employment, schools, shopping, and transit routes.
- 
- Policy 12.2** Provide pedestrian facilities that are physically separated from auto traffic on all arterial and collector streets.
- 
- Policy 12.3** Apply traffic calming measures to support neighborhood livability.

## INFRASTRUCTURE

### Water

#### GOAL 13: Seek the most efficient and economic means for constructing, operating, and maintaining the City's water supply, treatment, storage, and distribution system while meeting state and federal standards for potable water systems.

- Policy 13.1** Build, operate, and maintain adequate reservoir capacity to provide all equalization, operational, emergency, and fire flow storage required for the City's distribution system.
- 
- Policy 13.2** Plan, operate, and maintain the water system for all current and anticipated City residents within the Urban Growth Boundary and plan strategically for future expansion areas as detailed in the City's Water System Master Plan.
- 
- Policy 13.3** Collaborate with Portland Water Bureau, wholesale water customers, and the regional water consortium to ensure an adequate water supply, treatment, storage and distribution system is maintained for residents.
- 
- Policy 13.4** Implement a systematic, planned replacement program for pipe improvements and water meters to ensure reliable system operation and minimize expensive emergency repairs associated with failing pipeline infrastructure.

**Policy 13.5** Explore smart technology applications for water supply management such as smart metering, leakage detection, and water distribution management and planning.

**Policy 13.6** Implement and regularly update the City’s Water Systems Master Plan in order to evaluate capital investment, prioritize needs for the water system, and document a long-term water service strategy.

**Policy 13.7** Collaborate with the Planning Division to educate and promote water conservation and winter wet/summer dry landscaping and vegetation in developments, right of water, parks, and open lands to promote summer water conservation, and provide wildlife habitat, cooling, and oxygenated greenspace for Sandy residents.

**Policy 13.8** To the greatest extent possible, incorporate energy resiliency into water system designs to maintain adequate levels of service during disruptions due to power outages and natural disasters like fires and extreme storms.

**Policy 13.9** Coordinate with the United States Forest Service, Bureau of Land Management, Clackamas County, timber company representatives, and private landowners that own and manage lands within Sandy’s watershed, to protect drinking water.

## Community Needs

### GOAL 14: Invest in wastewater system improvements to build infrastructure redundancy and protect the environment.

**Policy 14.1** Pursue the study and development of expanded or new wastewater treatment plants and alternative discharges to manage the expected growth of Sandy.

**Policy 14.2** Assess discharge alternatives to protect the health of Tickle Creek and the Sandy River.

**Policy 14.3** Pursue funding sources and financing programs to maintain affordable sewer rates.

**Policy 14.4** Monitor and assess system development charges to support the expansion and improvement of the wastewater system.

**Policy 14.5** Explore the use of technology to optimize wastewater treatment processes and lower lifecycle costs of the system.

## Stormwater

**GOAL 15: Seek the most efficient and economical means available for construction, operating and maintaining the City’s stormwater management system while protecting the environment and meeting regional, state, and federal standards for protection and restoration of water resources and fish and wildlife habitat.**

- Policy 15.1** Provide Stormwater Management Services and monitor, report, and evaluate success of services consistent with National Pollutant Discharge Elimination System (NPDES) permit requirements.
- Policy 15.2** Maintain existing drainageways in a natural state for maximum water quality, water resource preservation, and aesthetic benefits.
- Policy 15.3** Identify opportunities for innovative stormwater management techniques and Low-Impact Development approaches in new growth areas.
- Policy 15.4** Provide education and programming to encourage property owners to reduce or mitigate for impervious pavement on commercial, industrial, and multi-family residential properties.
- Policy 15.5** Coordinate among City departments, Clackamas County, the Department of Environmental Quality, and other entities to protect, treat and improve water quality in and around Sandy.
- Policy 15.6** Plan, operate, and maintain the stormwater management system for all current and anticipated city residents within the existing Urban Growth Boundary and plan strategically for future expansion.
- Policy 15.7** Integrate the stormwater system with water conservation plans and seek opportunities for beneficial reuse of treated stormwater for irrigation.

## Municipal Broadband

**GOAL 16: Expand municipal broadband services to meet Sandy’s existing and future needs.**

- Policy 16.1** Develop a SandyNet Master Plan to expand sustainable fiber services.
- Policy 16.2** Collaborate with regional partners to increase broadband affordability and promote equity by closing the digital divide.

**Policy 16.3** Periodically study, plan, implement and review technologies and other services or amenities that positively impact the community, local economy, and City.

## Energy

### GOAL 17: Promote resource efficiency and energy conservation in the built environment.

**Policy 17.1** Promote infill development and land use patterns that locate activities and destinations in close proximity to reduce vehicle trips.

**Policy 17.2** Ensure responsive development code and standards that encourage energy-efficient design and energy-conserving features, including energy generation and storage, in new development, redevelopment and retrofit.

**Policy 17.3** Deploy electric vehicle (EV) charging infrastructure to meet current and future demand.

**Policy 17.4** Encourage the use of mass transit as a commuter service connection to the metropolitan area.

**Policy 17.5** Utilize smart technology applications to monitor and conserve energy use across public utilities and facilities.

**Policy 17.6** Coordinate with utility companies to expand renewable energy and provide robust, redundant infrastructure and service delivery.





# NATURAL HAZARDS & RESILIENCY





# CURRENT CONDITIONS

Sandy has already begun experiencing more extreme weather events. Increases in average temperature, extreme heat, drought, and wildfire danger, coupled with reduced snowpack, are altering the context within which the City of Sandy provides services as well as the lives of its residents.

The effects of extreme weather events and climate impacts in Sandy and the surrounding area go far beyond hotter temperatures, lower snowpack, and more wildfire and smoke.

Some potential impacts include:

- Heat-related illness and mortality
- Spread of vector-borne and water-borne disease
- Declining air quality from smoke and ground level ozone formation
- Drought emergencies limiting drinking and irrigation water
- Water resources affected by wildfire
- Warmer and lower streamflow impacting fish populations
- Loss of tourism related to lower snowpack, heat, and wildfire impacts to forests
- Health and safety impacts to outdoor workers (yard care, construction, etc.) increasingly impacted by smoke and heat

The City coordinates with Clackamas County on regular updates to the County's Natural Hazards Mitigation Plan (NHMP). While the NHMP is strategic and non-regulatory in nature, it does provide: (1) a foundation for coordination and collaboration among agencies and the public in the city; (2) identification and prioritization of future mitigation activities; and (3) aid in meeting federal planning requirements and qualifying for assistance programs. The mitigation plan works in conjunction with other city plans and programs including the Comprehensive Plan, Capital Improvements Plan, and Building Codes, as well as the Clackamas County NHMP, and the State of Oregon NHMP.

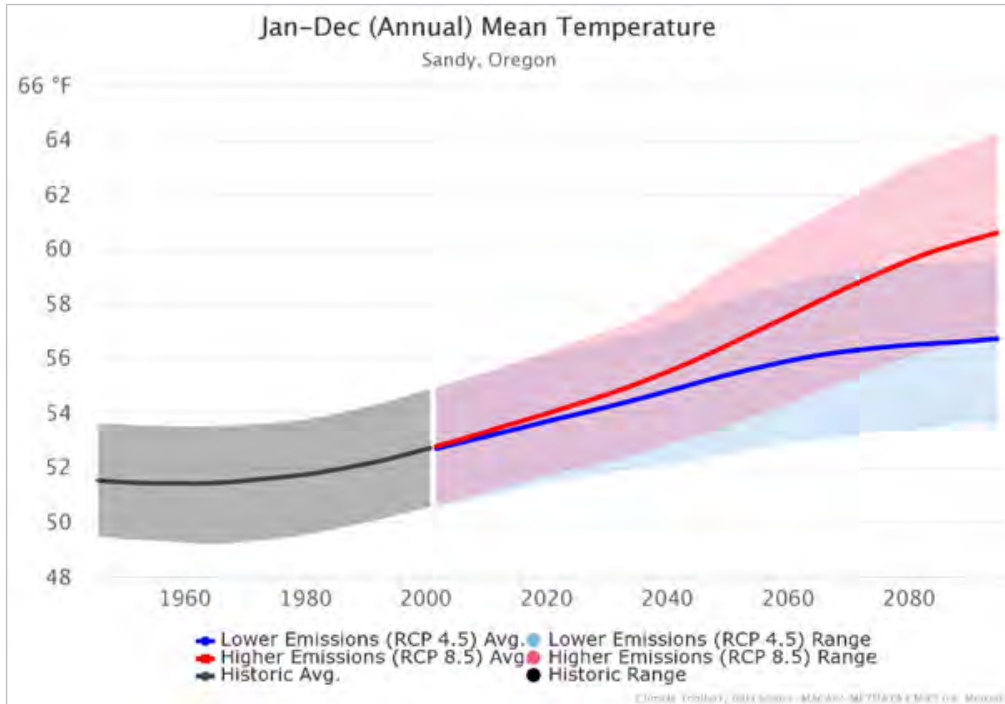
## Temperature

Sandy's climate is described as Mediterranean, with warm (but generally not hot) summers and cold winters. Most precipitation occurs October through May. November through January are the wettest months.

Warming has been documented throughout Oregon. The Oregon Climate Change Research Institute (OCCRI) found that statewide, Oregon has warmed by 2.8°F since 1895<sup>1</sup>. Long term weather records were not available specific to Sandy, Oregon, so records from the Portland International Airport (PDX) were assessed (Fig. 1). While average temperature and precipitation is different in Sandy than at PDX, the overall trends, including the magnitude of change, are likely to be quite similar for warming to date. Projected future conditions, on the other hand, come from global climate models downscaled to local scales and are geographically specific to Sandy.

<sup>1</sup> Dalton, M., and E. Fleishman, editors. 2021. Fifth Oregon Climate Assessment. Oregon Climate Change Research Institute, Oregon State University, Corvallis, Oregon. <https://blogs.oregonstate.edu/occri/oregon-climate-assessments/>.

If emissions of greenhouse gases continue as they are trending, average annual temperature in Sandy is expected to increase by 9°F (range from 5-13°F) by the end of this century, as compared to 1951-80. If emissions are substantially reduced, average warming could likely be limited to 5°F (range from 2-8°F) higher than 1951-80. Summer maximum temperature is expected to increase by 13°F, on average, if current emissions continue, and by 7°F if emissions are reduced.



**Figure 1.** Average temperature in Sandy, Oregon has increased since 1950 and is expected to continue to increase. If global emissions are reduced (RCP4.5) warming can be limited to about 5°F (range 2-7°F) by late century. If global emissions continue on the business-as-usual trajectory (RCP8.5), Sandy is expected to warm by 9°F (range 4-12°F) by 2100.<sup>2</sup>

Records from PDX show a steady increase in extreme maximum temperature from 1950-2021, with a sudden spike in the summer of 2021 from the heat dome that enveloped much of the Pacific Northwest. Similarly, the number of days per year above 90°F has increased by about 10 days (from about 8 days per year to 18 days per year) between 1950 and 2021. In Sandy, the number of days per year with temperatures over 90°F was historically quite low. As warming accelerates, more frequent days of high heat are expected (Table 1).<sup>3</sup>

Years	> 90°F	> 100°F	> 105°F
1990s	4	0	0
2025s	10	1	0
2055s	25	4	2
2085s	51	15	7

<sup>2</sup> Hegewisch, K.C., Abatzoglou, J.T., 'Future Time Series' web tool. Climate Toolbox (<https://climatetoolbox.org/>) accessed on 30 March 2022.

<sup>3</sup> Hegewisch, K.C., Abatzoglou, J.T., 'Future Climate Dashboard' web tool. Climate Toolbox (<https://climatetoolbox.org/>) accessed on 30 March 2022.

## Wildfire

Wildfire is and always has been an integral part of Western Forest ecosystems. Many species are highly reliant on wildfire and burned areas experience bursts in diversity as they recover after fire. Thus, while wildfire is a very real threat to human development and safety, it is not inherently a negative occurrence for forest ecosystems. Management that supports healthy and resilient ecosystems, including protecting fire-resistant mature forests and prescribed burning in previously harvested areas, can help reduce the risk of catastrophic fire.

The area burned by wildfire in Oregon has increased in the last century and is expected to continue to increase with hotter temperatures and more drought. Extreme wildfire danger averaged 11 days per year across Clackamas County in the 1990s and is expected to increase to 19 days per year by the middle of this century.<sup>4</sup>



The wildfire events experienced in the area in 2020 demonstrate the level of risk of wildfire. The City of Sandy proper experienced a level II evacuation notice during this event and a portion of the city's residents were part of the Public Safety Power Shutoff (PSPS) that is administered by Portland General Electric (PGE). The city's Police Department and other personnel were tasked with providing 24-hour public updates during the event via social media etc. Air quality in and around the area was of great concern during the event.

Wildfire smoke is also of concern to the residents of Sandy. As fires continue to become more frequent, smoke becomes an increasing hazard to human health, especially for residents with underlying health conditions and those who are unable to protect themselves by accessing clean indoor air.

## Floods and Landslides

The main sources of flooding in Sandy are Tickle Creek, No Name Creek, and numerous drainage ways. Regionally, the Sandy River is a flooding source as well, but not for Sandy as the river is located at a much lower elevation than the city. The 2024 Clackamas County NHMP determined that Sandy's probability of flooding is high and that the city's vulnerability to flooding is moderate. The largest flooding event affecting Sandy was in January 2009. A winter storm event led to flooding throughout many of the smaller tributaries and drainage ways, and also caused landslides along Highway 26.

The City complies with FEMA's National Flood Insurance Program through enforcement of their flood damage prevention ordinance, which was updated in 2019, and their floodplain management program. The last Community Assistance Visit (CAV) for Sandy was on April 28, 1994. Sandy does not participate in the Community Rating System (CRS).

<sup>4</sup> Hegewisch, K.C., Abatzoglou, J.T., and Chegwidgen, O., 'Future Climate Dashboard' web tool. Climate Toolbox (<https://climatetoolbox.org/>) accessed on 30 March 2022.



## Earthquakes

Per the 2024 Clackamas County NHMP, the Pacific Northwest in general is susceptible to earthquakes from four sources: 1) the offshore Cascadia Subduction Zone, 2) deep intraplate events within the subducting Juan de Fuca Plate, 3) shallow crustal events within the North American Plate, and 4) earthquakes associated with volcanic activity.

Dating back to 1841, there have been more than 6,000-recorded earthquakes in Oregon, most with a magnitude below three. Portland and its surrounding region is potentially the most seismically active area within Oregon. Based on the available data and research, the probability of Sandy experiencing a Cascadia Subduction Zone (CSZ) is “moderate”, meaning one incident may occur within the next 35 to 75 years. Clackamas County is susceptible to deep intraplate events within the Cascadia Subduction Zone (CSZ), where the Juan de Fuca Plate is diving beneath the North American Plate and shallow crustal events within the North American Plate. According to the Oregon NHMP, the return period for the largest of the CSZ earthquakes (Magnitude 9.0+) is 530 years with the last CSZ event occurring 323 years ago in January of 1700. The probability of a 9.0+ CSZ event occurring in the next 50 years ranges from 7 - 12%. Notably, 10 - 20 “smaller” Magnitude 8.3 - 8.5 earthquakes occurred over the past 10,000 years that primarily affected the southern half of Oregon and northern California. The average return period for these events is roughly 240 years. The combined probability of any CSZ earthquake occurring in the next 50 years is 37 - 43%.

# FUTURE TRENDS AND DRIVERS OF CHANGE

## Wildfire

According to the Oregon Climate Change Research Institute “Future Climate Projections, Clackamas County,” wildfire frequency, intensity, and area burned are projected to continue increasing in the Northwest. Wildfire risk, expressed as the average number of days per year on which fire danger is very high, is projected to increase in Clackamas County by 14 (range -6– 34) by the 2050s, relative to the historical baseline (1971–2000), under the higher emissions scenario. Similarly, the average number of days per year on which vapor pressure deficit is extreme is projected to increase by 29 (range 10–44) by the 2050s. Communities at risk to wildfire include those within the urban wildfire interface or along river or creek corridors, where fire can travel quickly. Sandy will need to address growing wildfire risks if populations are not restricted from expanding further into higher risk areas.

## Extreme Rainfall, Landslides, Mudslides and Flooding

Extreme rainfall is increasingly likely, even if average rainfall does not change. Storms larger than 99.9% of all historical storms are expected to increase in frequency in coming decades.<sup>5</sup> Oregon will face more mudslides and flooding during the next 80 years as a result of extreme wildfires followed by extreme rains.

<sup>5</sup> Touma, D. et al. 2022. “Climate change increases risk of extreme rainfall following wildfire in the western U.S. Science Advances v. 8. DOI: 10.1126/sciadv.abm0320

## Drought

Drought events have already become more frequent and extreme in Sandy, Oregon.<sup>6</sup> Continued higher temperatures will increase the rate of loss of soil moisture during dry periods, leading to increased intensity of droughts, even if precipitation rates do not change. Thus, drought is expected to worsen in the coming decades.

April 1 snowpack, measured as Snow Water Equivalent (SWE), has declined throughout the Western U.S. and Oregon by about 15-20% since the middle of the 20th century.<sup>7</sup> Across Clackamas County, snowpack is expected to continue to decline, from an average of 13 inches from 1971-2000 to an average of 1 inch by the end of this century.<sup>8</sup>

Streamflow is expected to change significantly on the Sandy River, with hydrology shifts similar to those projected on the Clackamas River. The historical pattern of two major pulses in winter and spring is projected to be replaced with a higher winter pulse and much lower spring and late summer flows.



## Winter Storms

Severe winter storms can consist of rain, freezing rain, ice, snow, cold temperatures, and wind. They originate from troughs of low pressure offshore that ride along the jet stream during fall, winter, and early spring months. Severe winter storms affecting Sandy typically originate in the Gulf of Alaska or in the central Pacific Ocean. These storms are most common from November through March. The biggest impact of winter storms is congestion on roadways. Highway 26 bisects Sandy and is used as the main route to the Mount Hood region for residents of the Portland Metro area. Although most winter storms typically do not cause significant damage, they are frequent, and have the potential to impact economic activity. Road and rail closures due to winter weather are an uncommon occurrence but can interrupt commuter and commercial traffic.

<sup>6</sup> Hegewisch, K.C., Krosby, M. "Historical Drought Stripes" web tool. Climate Toolbox (<https://climatetoolbox.org/>) accessed on 30 March 2022.

<sup>7</sup> Dalton, M., and E. Fleishman, editors. 2021. Fifth Oregon Climate Assessment. Oregon Climate Change Research Institute, Oregon State University, Corvallis, Oregon. <https://blogs.oregonstate.edu/occri/oregon-climate-assessments/>.

<sup>8</sup> Hegewisch, K.C., Krosby, M. "Future Boxplots" web tool. Climate Toolbox (<https://climatetoolbox.org/>) accessed on 30 March 2022.

According to the Oregon Climate Change Research Institute “Future Climate Projections, Clackamas County,” cold extremes will become less frequent and intense as the climate warms. In Clackamas County, the number of cold days (maximum temperature 32°F or lower) per year is projected to decrease by an average of 6 (range -3– -8) by the 2050s, relative to the 1971–2000 historical baselines, under the higher emissions scenario. The temperature on the coldest night of the year is projected to increase by an average of 6°F (range 0– 11°F) by the 2050s. The intensity of extreme precipitation is expected to increase as the atmosphere warms and holds more water vapor. In Clackamas County, the number of days per year with at least 0.75 inches of precipitation is not projected to change substantially. However, by the 2050s, the amount of precipitation on the wettest day and wettest consecutive five days per year is projected to increase by an average of 15% (range 0–31%) and 10% (range -1–26%), respectively, relative to the 1971–2000 historical baselines, under the higher emissions scenario.



Vulnerable populations will be more likely to experience the negative impacts of winter storms in the future, particularly the unhoused and the elderly.

## Earthquakes

Per the 2024 Clackamas County NHMP, the City’s probability for a Cascadia Subduction Zone (CSZ) earthquake is moderate and their vulnerability to a CSZ earthquake is high. This is due to Sandy’s proximity to the CSZ, potential slope instability and the prevalence of certain soils subject to liquefaction and amplification.

Due to the expected pattern of damage resulting from a CSZ event, the 2013 Oregon Resilience Plan divides the State into four distinct zones and places the Sandy predominately within the “Valley Zone” (Valley Zone, from the summit of the Coast Range to the summit of the Cascades). Within the Northwest Oregon region, damage and shaking is expected to be strong and widespread - an event will be disruptive to daily life and commerce and the main priority is expected to be restoring services to business and residents.





## Natural Hazards and Resiliency

# GOALS AND POLICIES

**In 2050, Sandy is resilient in the face of natural hazards.** As stewards of clean air, water, and land resources for future generations, Sandy guides the design of the built environment to protect, enhance, and be integrated with natural systems. The threat of natural hazards like wildfire and earthquakes is mitigated through emergency preparedness, education, and proactive planning. Sandy collaborates with local agencies, including Fire Districts, Clackamas County, and regional partners to plan for actions that can lessen the impact of natural disasters, ensuring the City and its partners have long-term strategies for protecting the community.



# COMMUNITY PREPARATION

## GOAL 18: Prepare Sandy residents and business owners for wildfire.

**Policy 18.1**

Work with Clackamas Fire District 1, Clackamas County Disaster Management, and other community partners to engage with Sandy residents, especially those with disabilities, so they are enrolled in the emergency alert system and ready to evacuate using the Ready, Set, Go readiness framework.

**Policy 18.2**

Work with Clackamas Fire District 1 to educate the public and business owners about how to reduce wildfire risk to their homes and businesses, providing direct assistance to low-income residents.

**Policy 18.3**

Adopt state level Wildfire Hazard Mitigation regulatory requirements and building codes that reduce fire risk for new construction.

**Policy 18.4**

Work with Clackamas County and the State of Oregon to enforce OSHA rules regarding wildfire smoke and provide equitable access to education and protective gear for local businesses.

**Policy 18.5**

Help residents address wildfire smoke through education, assistance with indoor filtration, and the identification of public facilities that can serve as smoke shelters during smoke events.

**Policy 18.6**

Work with Clackamas County Disaster Management to further develop and educate the public regarding evacuation procedures.

**Policy 18.7**

Work with PGE, the Oregon Trail School District, and other community partners to develop and implement a plan for extended power outages caused by Public Safety Power Shutoffs to address wildfire risk for all City managed facilities and infrastructure.

## GOAL 19: Prepare Sandy residents and business owners for earthquakes, floods, landslides, and other extreme weather events.

**Policy 19.1**

Implement public education and training programs so that residents are capable of sheltering in place for at least 14 days in an emergency with little to no outside assistance.

**Policy 19.2**

Develop and implement a plan for extended power outages caused by extreme weather events for all City managed facilities and infrastructure.

**Policy 19.3**

Collaborate with Clackamas County, community-based organizations, and state agencies to educate and enforce health and safety measures during extreme heat and cold events.

**Policy 19.4** Partner with community organizations to identify facilities that can act as air quality shelters during smoke events, inclement weather shelters during extreme cold events, and cooling centers during extreme heat events.

**Policy 19.5** Explore participation in the National Flood Insurance Program's Community Rating System.

## COMMUNITY RESILIENCE

### GOAL 20: Protect public and physical assets of the community from natural hazards.

**Policy 20.1** Assess public buildings and City managed facilities, utilities, open spaces, and park lands for wildfire, drought, flooding, earthquake, severe winter storms, and landslide risk.

**Policy 20.2** Implement risk reduction projects beginning with structures that are needed for emergency sheltering, and essential emergency services.

**Policy 20.3** Partner with PGE, the Oregon Trail School District, and other community-based organizations to disseminate communications regarding evacuation procedures.

**Policy 20.4** Promote and protect the use of naturally flood prone open space and wetlands as flood storage areas per the Sandy Development Code.

**Policy 20.5** Restrict development in high-risk areas through the Sandy Development Code and educate residents and businesses about the risk of property investment in these areas.

**Policy 20.6** Promote innovative site designs, building designs, and structural features that reduce the adverse impacts of natural hazards, such as creating defensible space, designing buildings in harmony with the landscape, and promoting stronger and more fire resistant roofs.

**Policy 20.7** Analyze DOGAMI's landslide hazard susceptibility maps for Clackamas County to support the regulation of steep slopes and other landslide hazards within Sandy's UGB.

**Policy 20.8** Monitor and mitigate blowdown that appreciably increases fuel loading on adjacent properties.

**GOAL 21: Partner and coordinate regionally to reduce risk from natural hazards.**

**Policy 21.1** Regularly update the City’s emergency response plan.

**Policy 21.2** Actively participate in Clackamas County’s Natural Hazard Mitigation Plan (NHMP) updates and plan implementation processes to ensure that the changing resilience needs of Sandy residents are reflected in revised plans.

**Policy 21.3** Engage with other communities across the region to implement the Clackamas Community Wildfire Protection Plan.

**Policy 21.4** Coordinate with Clackamas County Disaster Management to ensure that emergency management and community plans are well understood by residents, are produced in multiple languages, and the City is clear about its role in implementing those plans regarding known hazards.

**Policy 21.5** Engage with PGE and Clackamas County Disaster Management to ensure the City understands the utility’s approach for Public Safety Power Shutoffs to reduce wildfire risk, the County’s plan to address emergencies that will arise from those shutoffs, and the City’s role in such situations.

**Policy 21.6** Engage with the U.S. Forest Service and Oregon Department of Forestry regarding updates to forest management and timber harvest plans to ensure consideration of the needs of Sandy residents and strengthen relationships ahead of natural disasters, particularly wildfire.

**GOAL 22: Build community resilience to increasingly frequent natural disasters and other chronic stressors.**

**Policy 22.1** Implement water conservation measures at City facilities and encourage and support water conservation efforts among residents and local businesses to reduce the strain of more frequent and severe droughts.

**Policy 22.2** Encourage and support the local agriculture economy to reduce vulnerability to climate change-driven disruptions such as extreme heat, winter storms, windstorms, drought and wildfire.

**Policy 22.3** Work with the Chamber of Commerce and other local organizations to assess risks and plan for chronic environmental stressors to protect the viability of local festivals and celebrations.

**Policy 22.4**

Work with the Chamber of Commerce to support local businesses in developing natural disaster resilience plans and ensuring that they are adequately insured in the event of an emergency.

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**Policy 22.5**

Partner with community organizations to attract more health care providers and services to Sandy to prevent the community's healthcare system from being overwhelmed by increasingly frequent and severe natural disasters.

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**Policy 22.6**

Work with the State of Oregon, Clackamas County, and community partners to improve access to mental health care services, and help residents understand how natural disaster risk is changing and what they can do to protect themselves and their property.

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**Policy 22.7**

Partner with community organizations to provide opportunities for youth to volunteer and engage in the community as a means of reducing anxiety about natural disasters and other chronic stressors.





# PARKS, TRAILS, & NATURAL RESOURCES







Image: AntFarm

# CURRENT ASSETS, PRACTICES AND CONDITIONS

## PARKS AND TRAILS

### Organization and Partnerships

The City of Sandy includes a Parks and Recreation Department that maintains and makes improvements to the city's parks, open spaces, public spaces, and public buildings. These facilities are maintained by three full-time employees and a seasonal worker employed during the summer months. Parks maintenance staff also perform minor building maintenance for City facilities.

Policy for Sandy's parks system is overseen by the City Council with assistance from a seven-person Parks & Trails Advisory Board. One City Council member is assigned as a liaison between the Parks & Trails Advisory Board and the Sandy City Council. The Parks & Trails Advisory Board is a volunteer board that supports planning and advocacy for the parks system.


In addition, the City maintains several community partnerships to assist with maintenance, funding, and access to parks, trails, and other outdoor amenities, including:

- **Oregon Trail School District (OTSD)** - The City occasionally provides funding for sports fields and court improvements, and the district rents out facilities for youth and adult recreation sport leagues, summer camps, parades, pet shows, and other community events.
- **AntFarm** - AntFarm is a non-profit dedicated to serving community youth including job and environmental skills training through hands-on volunteer work. The City has partnered with AntFarm and its YouthCore Crew to construct trails at Sandy River Park and a community garden at Bornstedt Park.

- **Mt Hood Athletic Club** - The City occasionally partners with the Mt. Hood Athletic Club for special events including fun runs and senior activities.
- **Non-profit and For-profit organizations** - The City is finalizing a permit process that includes an application, fee structure, insurance requirements, and permits to formalize the use of City parks and trails for fundraisers and other organizational events.
- **Volunteers** - Sandy has a long history of parks related volunteerism, including a 100-person effort to construct the Fantasy Forest Playground in Meinig Park, fundraising for dog parks and other improvements, and service day outings such as SOLVE in Sandy. However, there is no coordinated parks and trails volunteer organization to provide consistent operations and maintenance assistance.



Image: Mt Hood Athletic Club

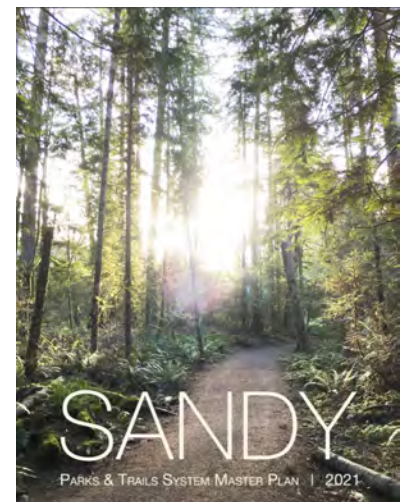


### Bee City USA Affiliate Status

In 2021, Sandy became a Bee City USA affiliate city. Bee City USA is a designation bestowed by The Xerces Society for Invertebrate Conservation on cities throughout the United States that have committed to protecting and increasing pollinator habitat on public and private land as well as to educating the public about the importance of pollinator species.

## 2022 Parks and Trails Master Plan

In 2021, the City of Sandy updated their Parks and Trails Master Plan, which describes the City’s current parks, trails and open spaces, and identifies strategies for future development and improvement based on forecasts, trends and community priorities. This plan was revised and readopted in 2022. These updates replace the 1997 Parks Master Plan and were undertaken to address the city’s steady population growth, recent expansion of the Urban Growth Boundary (UGB), and completion of many of the projects outlined in the 1997 Plan. The plan provides guidance for managing continued growth through 2035, and envisions that:



***“Future parks will be designed to incorporate amenities, features, and practices which prioritize a diverse, inclusive, accessible, and sustainable park system that incorporates public art where possible.”***

## Existing Parks and Trails

Per the Parks and Trails Master Plan, Sandy classifies its park facilities into five primary classifications:

- **Mini parks** provide basic recreation opportunities on small lots, within residential areas serving an area within 5-minute walking time (approximately ¼ mile) from neighbors. Sandy currently has six mini parks, all of which are developed. This includes Barlow Ridge Park, Cascadia Park Tot Lot, Hamilton Ridge Park, Knollwood Park Tot Lot, Salmon Estates Park, and Timberline Ridge Park.
- **Neighborhood parks** provide close-to-home recreation opportunities, primarily for passive and non-organized recreation activities. They are found within approximately 5–10-minute walking time (approximately ¼ - ½ mile) from local residences, without crossing major roads and/or other structures that can be considered barriers for safe and easy walking and biking. Sandy currently has seven neighborhood parks, with four developed parks and three undeveloped parcels. These include Bornstedt Park, Cascadia Park, Champion Way Park, Deer Point Park, Ponder Lane, Sandy Bluff Park, and Tupper Park.
- **Community parks** are typically larger in size and serve a broader purpose than neighborhood parks. Their focus is on meeting the recreation needs of several neighborhoods or large sections of the community, as well as preserving unique landscapes and open spaces. Sandy's two community parks include Cedar Park and the Basecamp Action Sports Park, and the Meinig Memorial Park.

- **Natural areas and open space lands** are set aside for preservation of significant natural resources, remnant landscapes, open space, and for visual buffering. They may preserve or protect environmentally sensitive areas, such as wildlife habitats, wetlands, riparian corridors, and/or endangered plant species. Sandy currently has six natural areas, four of which include trails and other passive recreational uses. These natural areas include Knollwood Park, Sandy River Park, Sandy Community Campus, and Tickle Creek Park, as well as open space parcels.
- **Special use** areas refer to parks that include waterfront parks, boat ramps, memorials, historic sites, waysides, sites with significant geologic or scenic features, and single purpose such as dedicated sports complexes, dog parks, skate parks, display gardens. Sandy currently has four special use areas: Jonsrud Viewpoint, Centennial Plaza, the Community/Senior Center, and Veterans Memorial Square.

Trails include both hard and soft surface trails and paths to accommodate a variety of activities such as walking, running, biking, dog walking, rollerblading, skateboarding, and horseback riding. There are approximately 5.76 miles of path/trail within parks, and 4.20 miles outside of parks within Sandy.



## Other Park Providers

Just beyond City limits, numerous parks and trail systems exist throughout Metro and County lands, as well as the Mt. Hood National Forest. Below are some significant parks and natural areas managed by other providers within a ten-mile radius of Sandy.

### Bureau of Land Management (BLM)

- Sandy Ridge Trail System – 15+ miles of singletrack mountain biking trails approximately 10 miles east of Sandy.
- Wildwood Recreation Area -- This 550-acre forest park located 15 minutes to the east of Sandy features Cascade Streamwatch and Wetland Boardwalk interpretive trails and offers access to the pristine Salmon-Huckleberry Wilderness. The site also provides group picnic sites, a playground, and multiple ball fields.



Image: BLM

### United States Forest Service (USFS)

- Mt. Hood National Forest – the USFS manages the Mt. Hood National Forest, which encompasses 1.1 million acres and includes large areas of designated wilderness. Mt. Hood National Forest offers year-round recreation opportunities and its watersheds provide drinking water to the greater Portland area. The Clackamas River Ranger District is the Mt. Hood National Forest Headquarters and moved its offices to the City of Sandy in 2020.



Image: USFS

### Oregon Parks and Recreation District (OPRD)

- Milo McIver State Park – 2,000-acre park with developed campgrounds, river recreation and fishing access, hiking and equestrian trails, and disc golf. Situated along the Clackamas River near Estacada.
- Bonnie Lure State Recreation Area – 150-acre passive day use nature park along the Clackamas River near Eagle Creek.



Image: ORPD

**METRO**

- Oxbow Regional Park – 2,000-acre park with developed campgrounds, river recreation and fishing access, hiking and biking trails, playgrounds, and wildlife viewing. Situated along the Sandy River east of Gresham.
- Clackamas County Parks
- Boring Station Trailhead –Transition point between the Springwater Corridor and the Cazadero Trail. Small park in Boring with a playground, restroom, and picnic shelter.
- Eagle Fern Park – 360-acre day-use park with hiking, creek access, fishing, and picnic shelters, situated to the south of Sandy.
- Barton Park – 300-acre park with developed campgrounds, hiking, multiple day use and event amenities, and a variety of river recreation opportunities. Situated along the Clackamas River.
- Barlow Wayside Park – 180-acre passive day use nature park with trails near the Sandy River and BLM Sandy Ridge Trail System.



Image: METRO

**Portland Water Bureau**

- Dodge Park – Day use river recreation, fishing, playground, and picnic facilities situated along the Sandy River north of Sandy.

**NATURAL RESOURCES**

The City of Sandy is home to a wide range of natural resources, including open space, wetlands, riparian corridors, floodplains, wildlife habitat and forests. The City takes pride in its natural assets and protects these resources and the quality of air, land and water through a variety of regulatory tools and programs. The City maintains a Flood and Slope Hazard (FSH) Overlay District and relies on topographic mapping and the 1997 Local Wetland Inventory to identify sensitive natural areas. In addition, the City enforces development code standards such as wetland delineation and geotechnical reports, as well as urban forestry requirements. These provisions shape development in a way that protects the function of these resources.

In 2022, the Oregon Department of Environmental Quality (DEQ) and the U.S. Environmental Protection Agency (EPA) mandated improvements to the City’s wastewater infrastructure in order to comply with the EPA’s Clean Water Act, which establishes the basic structure for regulating discharges of pollutants into waterways and regulating quality standards for surface waters. In response, Sandy established the Sandy Clean Waters project in 2023 to protect water quality in Tickle Creek and explore alternative water treatment options and water recycling opportunities.



# FUTURE TRENDS AND DRIVERS OF CHANGE

While Sandy has made much progress growing its parks and trail system and preserving natural resources and open space, there are various trends in Sandy that will affect future demand for these amenities and approaches to maintaining natural areas, open space, and scenic and historic areas.

## PARKS AND TRAILS

The following trends were identified in the 2022 Parks and Trails Master Plan Needs Assessment:

- Residents have various priorities for the future of Sandy’s parks and recreation system. Priorities identified from the community engagement process include:
  - » Bike pump track and a progressive skills complex for both bike and skate
  - » Sports fields for pick up sports, such as soccer and baseball
  - » Sports complex with lights and synthetic turf
  - » Trails and trail connections (Tickle Creek to Cazadero, connect with Timberline Trail, add trail at Sandy Vista, Sandy River rustic trails, incorporate Tickle Creek trail, connect with Springwater). Trails and connections could loop around the City, utilize powerline corridors, and should include safer road crossings as well as wayfinding signage.
  - » More programming/amenities for disabled individuals, such as: sensory gardens, raised beds for community gardens, improved surface trails, accessible trails, universal designed playground.
  - » Standing Wave/Whitewater Park
  - » Pickleball facilities
  - » Outdoor basketball hoops
  - » Dog park trail system with natural features
  - » Restrooms and covered shelters/ multipurpose spaces
  - » Family oriented facilities with activities for a range of age groups such as open fields, picnic areas and BBQ’s.
  - » Improved geographic distribution of facilities, such as a community garden and basketball court for the north side of town, and a dog park and large field for the south side of town.



- Sandy's existing park system and amenities are aging. Deferred maintenance over a long period of time can result in unusable amenities when perceived as unsafe or undesirable by park patrons. In addition, Sandy is experiencing limited staff resources and a very low parks maintenance staff to population ratio to ensure routine maintenance and longevity of facilities.
- Natural barriers (such as rivers) and developed barriers (such as major highways) impact the expansion or improvement of recreational amenities.
- As population growth continues, geographic distribution of parks and trails should be equitable and responsive to barriers that disrupt service areas. Non-standard amenities, such as skate spots, splash pads, dog parks, nature trails, etc., should also be distributed equitably across the system. This will likely require redevelopment of aging, existing facilities to add or expand amenities to avoid desirable public space clustering around new development.
- Given the recent spike in interest and participation in outdoor recreation, special urgency should be given to the development of community parks to meet demand for amenities like sport courts, sport fields, and other active use spaces like disc golf and off-road cycling.
- Sandy has recently renewed its planning efforts focused on assessing the City's current and future aquatic program needs. Options have been explored to address the physical and program deficiencies of the outdated Olin Y. Bignall Aquatic Center by either renovating the facility or constructing a new aquatic facility. After detailed analysis and evaluation, a City-led task force recommended against renovating and/or expanding the existing Aquatic Center, in favor of developing a new indoor swimming facility. The City is currently exploring options to leverage the existing Middle School Annex Building to develop a combined aquatics and community center facility.





## NATURAL RESOURCES

In the years ahead, Sandy will continue to emphasize strong protections for fish and wildlife habitat, watersheds and urban forest through an efficient and balanced regulatory framework, as well as improvements to the City's infrastructure to preserve and enhance air, land and water quality. The following trends will direct future efforts in natural resource management:

- Recent, large-scale investments in infrastructure will continue to improve water quality in local streams and ensure compliance with state and federal standards.
- The City's inventories of significant natural resources are out of date. As development pressures grow, additional funding will need to be secured to update these inventories, specifically the City's 1997 Local Wetland Inventory.
- As the protection of natural resources become more complex in the face of changing environmental conditions, increasing natural hazards, and development pressures, the City will look to collaborative approaches with public and private partners to expand community awareness and stewardship of natural resources.







## Parks, Trails and Natural Resources

# GOALS AND POLICIES

**In 2050, Sandy's natural and scenic landscape is an extension of the community.**

Clean rivers, healthy trees, and wildlife habitats are carefully conserved to promote biodiversity. Forested areas within the City are protected as parks, trails and natural open space. Sandy preserves the unique character and charm of beloved assets like Meinig Memorial Park, Sandy River Park, the Tickle Creek Trail, and Jonsrud Viewpoint. The City continues to develop recreation programs and a diverse and accessible park and trail system that is clean, safe, and functional, serving the needs of residents.

## PARKS AND TRAILS DEVELOPMENT

### GOAL 23: Develop parks, amenities, and recreation opportunities that are equitably distributed across the city.

- Policy 23.1** Fill service area gaps so that all residential areas are served based on the Parks and Trails Master Plan's (PTMP) levels of service.
- 
- Policy 23.2** Develop a new community park with multi-purpose sports fields.
- 
- Policy 23.3** Improve geographic distribution of key amenities such as dog parks, community gardens, and splash pads.
- 
- Policy 23.4** Improve existing undeveloped park land such as Champion Way, Deer Point, Ponder Lane, and Cedar Park.
- 
- Policy 23.5** Revitalize parks, including Tupper Park, Sandy Bluff Park, and Meinig Park, by renovating outdated equipment such as playgrounds, sport courts, and paths.
- 
- Policy 23.6** Prioritize inclusive and universally accessible playground upgrades that cater to various mobility types, special needs, and age groups as parks and amenities are developed or improved.
- 
- Policy 23.7** Prioritize the development of parks that include unique amenities not currently offered in the City parks system such as a pump track, pickleball courts, a disc golf course, sensory gardens, nature play areas, sports field(s), and other features.
- 
- Policy 23.8** Prioritize the development of neighborhood and community park types instead of mini parks when land is available and minimize acquisition and development of mini parks to only highly constrained areas and small service area gaps without options for larger park types.
- 
- Policy 23.9** Evaluate and incorporate natural areas, wildlife habitat, and native pollinator gardens into parks where appropriate.

## **GOAL 24: Create a looped network of trails connecting parks, neighborhoods, and natural open spaces that provides opportunities for alternative transportation and recreation throughout the city.**

**Policy 24.1** Improve trail connections and pedestrian transportation outlined in the PTMP to connect neighborhoods with key destinations including schools, other parks, and commercial areas.

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**Policy 24.2** Provide safe pedestrian crossings on busier streets such as Highway 26, Highway 211, and Bluff Road through signalization and over-or-under-passes.

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**Policy 24.3** Renovate existing paths and trails throughout the city to provide accessible routes to parks and amenities in accordance with the Americans with Disabilities Act Standards for Accessible Design.

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**Policy 24.4** Pursue a public access easement with the Oregon Trail School District to allow access to future public trails south of the high school.

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**Policy 24.5** Connect natural open spaces through multi-purpose trails identified in the PTMP.

## **GOAL 25: Secure funding for land acquisition, recreation development, operations, and maintenance.**

**Policy 25.1** Regularly update the System Development Charge Methodology and the fee in lieu calculations to optimize funding from these sources.

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**Policy 25.2** Ensure methods for acquisition of community park land, such as fee-in-lieu and system development charges (SDCs) are regularly updated to reflect current land and development costs.

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**Policy 25.3** Study the implementation of a General Obligation/Revenue Bond to help fund park development and major renovation projects identified in the Capital Improvement Plan (CIP).

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**Policy 25.4** Study the implementation of a Parks Utility Fee to help fund park maintenance and operations.



**Policy 25.5** Study the application of stormwater user fees to maintain stormwater facilities that reside in parks.

**Policy 25.6** Develop an asset management program that includes a detailed inventory and assessment of existing city-wide parks infrastructure and amenities to help plan for and prioritize life-cycle renovation and replacement for these systems.

**Policy 25.7** Evaluate the cost efficiency and effectiveness of balancing contract services with increased staffing levels, including additional volunteer coordinator positions, to match system growth.

**Policy 25.8** Support non-profits and volunteers to acquire land, obtain donations, secure grants, and engage local groups and residents to help build and maintain parks and trails.

**Policy 25.9** Advocate for fire reduction funding to support proactive measures that mitigate wildfire risks, ensuring community safety and the preservation of Sandy's parks, trails, and natural resources.

## NATURAL RESOURCES

### GOAL 26: Protect forest, river, and wetland ecosystems and the native species they support.

**Policy 26.1** Partner with the Oregon Department of Fish and Wildlife, US Forest Service, and other large landowners to improve forest and watershed health ahead of impacts due to extreme heat, reduced snowpack, wildfire, and drought.

**Policy 26.2** Safeguard natural waterways by utilizing water conservation measures and programs that limit water demand from the City of Sandy, its residents, and local business owners, particularly during late summer when natural flows are the lowest of the year.

**Policy 26.3** Partner with the Oregon Department of Fish and Wildlife, the Clackamas Soil and Water Conservation District, and other local organizations to develop projects to protect native species at risk due to increased pests and species migration driven by changing climate conditions.

**Policy 26.4** Favor the use of natural drainage systems and other non-structural methods to treat, convey, and dispose of rainwater runoff.

**Policy 26.5** Update the 1997 Wetlands Inventory and mapping of approximate areas of known stream corridors, wetlands, and associated buffers.

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**Policy 26.6** Where feasible, preserve natural vegetation resource sites through public acquisition, conservation easements, or other available methods to permanently limit development.

## GOAL 27: Protect and sustain Sandy's urban forest.

**Policy 27.1** Update the City urban forestry code to integrate consideration of changing climate conditions and invasive species.

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**Policy 27.2** Develop an urban forestry plan that provides direction for the maintenance and improvement of Sandy's urban tree canopy.

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**Policy 27.3** Adopt procedures for City properties and rights-of-way that promote the use of drought tolerant, native trees and plants.

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**Policy 27.4** Educate residents regarding how to address invasive species, implement drought and fire-resistant plants, and protect tree health on their property.

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**Policy 27.5** Develop incentives to encourage the preservation of significant trees.

## GOAL 28: Protect and conserve open space.

**Policy 28.1** Identify and inventory open space corridors within the Sandy urban growth area. Open space shall include lands useful for fish and wildlife habitat, trails, public access to natural resource lands and water, and protection of environmentally sensitive areas.

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**Policy 28.2** Employ development regulations to preserve and protect open space and environmentally sensitive lands, integrate the natural environment of Sandy into project designs, minimize the creation of impervious surface, and incentivize the protection of native trees and other vegetation.

**Policy 28.3** Wherever possible, establish native growth protection areas along Highway 26 at both the east and west entries to the city. These areas are intended to provide a pleasant entry to the city, screen industrial uses from the highway, and provide a buffer between the highway and other land uses.

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**Policy 28.4** Where appropriate, connect public open space or private protected open space to other open space corridors established by other agencies and by private development.

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**Policy 28.5** Work with property owners and developers to preserve open space along Tickle Creek as part of the Tickle Creek Greenway.

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**Policy 28.6** Where feasible, restore and maintain the system of parks and open space in the city to serve the habitat and migratory needs of fish and wildlife in the Sandy River and Clackamas River basins.

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**Policy 28.7** Develop forest vegetation management plans for City-owned open space along Sandy River and Tickle Creek to address noxious weeds, mitigate blowdown, and support drought-tolerant vegetation.

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**Policy 28.8** Employ fire mitigation measures to reduce wildfire risks, protect lives and property, and preserve natural landscapes for future generations.

## **GOAL 29: Ensure ecologically sound development.**

**Policy 29.1** Maintain environmental quality by guiding future development and land use activities such that allowed activities will not significantly deteriorate the existing high quality of air, water, and land resources.

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**Policy 29.2** Notify applicable state and federal natural resource protection agencies of development proposals potentially impacting important natural features including the Department of State Lands (DSL) for any development that will occur in an area with wetlands or other waters of the state.

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**Policy 29.3** Identify and inventory significant natural features during the development process to preserve natural features or mitigate losses by placing conditions upon development using city, state, and federal government regulations to achieve this objective.

**Policy 29.4** Promote innovative site and building designs which reduce the adverse impacts of development on stream corridors by encouraging projects that protect, maintain, enhance, and restore the natural functions and values of stream corridors.

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**Policy 29.5** Require development and construction projects to minimize disturbance of and adverse impacts to native tree stands and other areas of significant vegetation and promote innovative site and building designs to meet these objectives.

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**Policy 29.6** Require appropriate reforestation efforts in open space areas to help mitigate the adverse impacts of development.

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**Policy 29.7** Prioritize and encourage both infill development and brownfield development to protect the environment and promote urban revitalization.

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**Policy 29.8** Advocate for the use of xeriscaping as a water-wise landscaping practice that conserves water, reduces maintenance needs, and enhances sustainability.





# GOVERNANCE & GROWTH MANAGEMENT







# CURRENT ASSETS, PRACTICES AND CONDITIONS

Urbanization in Oregon is a multi-faceted topic which deals with the availability of land within an Urban Growth Boundary (UGB) to accommodate forecasted residential and employment growth, the transition of land from rural to urban uses, the provision of public services to urbanizing land, and the long-term governance of already urbanized unincorporated land by cities. Local governments approach urbanization through land use planning mechanisms such as Comprehensive Plans, Zoning, and Development Code.

## COMPREHENSIVE PLAN

Sandy’s previous Comprehensive Plan was adopted in 1997 and amended in 2012. Similar to the previous (1997) Comprehensive Plan, the updated (2024) Comprehensive Plan includes a Comprehensive Plan Map, which applies broad, conceptual land use designations that are further defined on the City’s zoning map. A unique feature of the 1997 Comprehensive Plan was the establishment of Urban Reserve areas outside the Urban Growth Boundary (UGB). See Appendix I. Comprehensive Plan Map and Zoning Map.

## ZONING AND DEVELOPMENT

The Zoning Map details zoning districts (also known as “zones”), overlays (such as the Flood Slope Hazard and Bornstedt Village Overlay), and other details pertinent to planning in Sandy. Zoning regulations describe how land will be used for residential, commercial, industrial, or parks/open space needs and how the land can be used (also known as “uses”) in a given zone. All these zoning regulations are specified in the City’s Development Code, which determines if a use is permitted, conditional, or not permitted. Sandy’s mix of land uses and acreage are listed in Table 1 and described in the Land Use Gallery of the Comprehensive Plan.

Zone	Acreage
Parks and Open Space (POS)	309.6
Low Density Residential (SFR, R1)	3000.9
Medium Density Residential (R2)	463.7
High Density Residential (R3)	251.9
Commercial (C1, C2, C3)	489.3
Industrial (I1, I2, I3)	396.1

Table 1. Sandy Land Uses by Zoning Districts



## URBAN GROWTH BOUNDARY EXPANSION

In 2017, Sandy expanded the City's UGB by 668 gross acres, based on the land needs in the 2015 Urbanization Study.<sup>1</sup> Prior to this expansion, Sandy's UGB had accommodated housing, employment, park and school needs for nearly 20 years. The last time the UGB had been amended was in 1997 when the Bornstedt Village area south of Highway 211 and west of Bornstedt Road was brought into the UGB.

In 2001, the City of Sandy entered an Urban Growth Management Agreement (UGMA) with Clackamas County. The UGMA coordinates the management of land brought in by modifications to the UGB or Urban Reserve Areas (URA) through amendments to the City and County's Comprehensive Plans.



<sup>1</sup> City of Sandy UGB Expansion Analysis, Table 3.11. February 2017. <https://www.ci.sandy.or.us/sites/default/files/fileattachments/planning/page/6751/66339.pdf>



# FUTURE TRENDS AND DRIVERS OF CHANGE

## POPULATION AND EMPLOYMENT GROWTH

Sandy has experienced explosive population growth over the last two decades, more than doubling in residents between 2000 and 2021. Based on the City's 2024 Housing Capacity Analysis (HCA), Sandy's UGB is forecast to grow from 13,877 people in 2023 to 20,227 people in 2043, an increase of 6,350 people. This population growth will occur at an average annual growth rate of 1.9%, which is slower than in the past.

Population growth has also resulted in a growth of jobs in Sandy. Based on the 2024 Economic Opportunities Analysis (EOA), Sandy's employment base is 5,514 employees in 2023. Sandy is forecast to have 8,037 employees by 2043, an increase of 2,523 jobs over the planning period. These forecasts have implications for the type and amount of land Sandy will need in order to accommodate more housing and jobs:



- Based on population projections in the 2024 HCA, Sandy has sufficient land to accommodate population growth over the twenty-year planning period. The forecasted growth of 6,350 people will result in the demand for 2,424 new dwelling units over the twenty-year planning period, averaging 121 new dwelling units annually. While Sandy has sufficient land in all plan designations to meet projected growth, the R-2 zone is low on capacity.
- Based on employment projections in the 2024 EOA, the forecast for land needed to accommodate employment growth in Sandy shows that the growth of 2,523 new employees will result in demand for about 154 gross acres of commercial and industrial employment lands. Sandy has sufficient land to accommodate demand for commercial employment in the Sandy UGB, but it does not have sufficient land to accommodate demand for industrial employment. Based on land demand, Sandy is forecast to have a 52-gross-acre surplus of commercial land and a 9-gross-acre deficit of industrial land.

Key infrastructure barriers limit Sandy's ability to accommodate projected growth. In 2023, a development moratorium was put in place due to the limited capacity of Sandy's wastewater infrastructure. Building capacity in the City's wastewater system is essential in meeting the housing needs of future residents, but this will take time. In 2023 the City began an analysis to determine how much capacity is available for development over the next few years.



## STATEWIDE LEGISLATION

Population growth has affected nearly all communities in Oregon, driving up land and housing prices, among many other factors. In response to the statewide housing crisis, as well as rising energy costs and the prevalence of more extreme natural hazards affecting Oregon communities, the State is undertaking new legislation aimed at strengthening Oregon's administrative rules about transportation and housing planning.

### House Bill 2001

In 2019, the Oregon Legislature passed a bill to address rapidly rising housing costs by increasing the supply of more diverse and affordable housing choices. HB 2001 effectively eliminated single-family zoning by requiring cities across the state with a population of greater than 10,000 people to allow the development of duplexes in all zones that allow single family homes. Cities outside of Metro were required to amend their zoning codes to allow for the provision of HB 2001 by June 2021. Sandy adopted the code changes in 2021. However, the transformation of housing choices is expected to be relatively gradual, and its implications on whether and how this development will occur remains uncertain. Future land use decisions and urbanization strategies for Sandy will need to reflect both the desire for increased employment and the need for additional housing.



## PLANNING FOR RESILIENCY

In response to the increasing prevalence of natural hazards that affect both Oregon and the greater Pacific Northwest, there is a general, emerging trend for incorporating natural hazards and resiliency planning across multiple Comprehensive Plan sections. Energy efficiency, renewable energy, and the reduction of non-renewable energy overlap with urbanization when accommodating projected population and employment growth, the orderly and efficient transition of land from rural to urban use, and the extension of public facilities and services. Pursuing energy efficiency, renewable energy, and the reduction of non-renewable energy when urbanizing new areas

and extending public facilities and services can support climate resilience and adaptation measures. For local planning in unincorporated non urbanized areas on the edge of the UGB and in unincorporated urbanized areas, greenhouse gas emission reduction from cars and light-duty trucks can be achieved through multi-modal connectivity, an active public realm, and an urban built environment where access to daily needs are integrated into neighborhoods. These concepts are being more readily incorporated and codified into Comprehensive Plans to address the pressures of urbanization and the opportunity to develop more resilient communities.



## Governance and Growth Management **GOALS AND POLICIES**

**In 2050, Sandy is proactive in managing and planning for growth.** Sandy is an innovative community that addresses change through thoughtful planning and effective governance. Growth and development are guided by community values, fiscal responsibility, and strategic investments in services and infrastructure. Premier fire, police and emergency response services ensure safety for residents. Regulatory tools and practices are consistently updated to address new issues, and new development contributes to the expansion of public utilities. Leadership and residents engage with one another in decision-making processes so new opportunities benefit the community while preserving Sandy's small-town feel.

# URBANIZATION

**GOAL 30: Promote efficient development within Sandy’s Urban Growth Boundary (UGB) to accommodate long-range population and employment growth, minimize the cost of providing public services and infrastructure, and protect resource land.**

**Policy 30.1** Periodically evaluate and update the City’s 20-year land supply to meet short term and long-term employment, housing, park, and infrastructure needs.

**Policy 30.2** Maintain Sandy’s designated Urban Reserve Area (URA) to guide longer-term development and to be considered for inclusion within the UGB when land needs are identified that cannot be accommodated with zone changes inside the existing UGB.

**Policy 30.3** Facilitate infill development of vacant or underutilized land within the UGB consistent with Comprehensive Plan land use designations.

**Policy 30.4** Direct urban growth and land annexation in a generally contiguous, orderly, and coordinated manner that is consistent with the City’s ability to maintain and extend cost-effective and resilient public services and facilities.

**Policy 30.5** Consider infrastructure capacity and costs, including ongoing maintenance and the redundancy of facilities, when balancing infill and redevelopment opportunities with the potential need for land annexation or a UGB expansion.

**Policy 30.6** Prior to annexation, require areas with 20 or more acres of contiguous land to complete community-level plans, like concept plans, master plans, and specific area plans, to designate and integrate specific land uses and transportation elements through broad local community engagement.

**Policy 30.7** Consider the needs of parks and open space and natural hazards, specifically wildfire and flooding risks, when evaluating the capacity of Sandy’s UGB and UGR.

**Policy 30.8** Advance resource efficiency, renewable energy, and reduction of nonrenewable energy use when areas are urbanized or are being redeveloped at higher densities.

## **GOAL 31: Engage in good governance by coordinating with local, regional and statewide agencies and partners to provide services commensurate with urban growth.**

- 
- Policy 31.1** Maintain a Comprehensive Plan and associated implementation tools, consistent with the Oregon Statewide Planning Goals, and applicable state and federal regulations.
- 
- Policy 31.2** Exercise home rule authority in matters of local concern to the fullest extent allowed by state rules and legislation.
- 
- Policy 31.3** As required by State policy, work with the State of Oregon to develop strategies that encourage the production of housing without negatively impacting infrastructure in Sandy.
- 
- Policy 31.4** Pursue cooperative agreements with other governmental agencies to facilitate the implementation of the Comprehensive Plan and as a mechanism to jointly or cooperatively plan, finance, construct, and/or administer related projects.
- 
- Policy 31.5** Refine and update procedures established by the Urban Growth Management Agreement (UGMA) with Clackamas County, to coordinate the management of unincorporated lands within the UGB and URA.
- 
- Policy 31.6** As established by the UGMA, maintain the City's lead role in designating planned land uses and densities and coordinating public facility planning for incorporated and unincorporated lands within the UGB and URA.
- 
- Policy 31.7** As established by the UGMA, maintain the County's lead role in applying county zoning and processing land use applications for unincorporated lands within the UGB and URA until annexation to the City of Sandy.
- 
- Policy 31.8** Preserve and protect the rural and natural character of the Highway 26 Green Corridor that separates Sandy from the Portland Metro Area through the existing agreement with Clackamas County, Metro, and ODOT.
- 
- Policy 31.9** Monitor and evaluate police, fire, and emergency management resources to ensure service levels are commensurate with the city's population and maintain a high level of public health, safety, and community preparedness.



## LAND USE PLANNING

### GOAL 32: Maintain a process and policy framework for land use planning and ensure an adequate factual base for land use decisions and actions.

- Policy 32.1** Provide a technical foundation that documents and evaluates existing conditions, such as analyses and inventories related to economic development, housing, and natural resources, in order to inform and refine Comprehensive Plan policies and provide a foundation for future updates.
- 
- Policy 32.2** Periodically update City Master Plans and Zoning Map to respond to current and future conditions and ensure alignment with the Comprehensive Plan.
- 
- Policy 32.3** Ensure that land use and plan administration procedures consider relevant agreements with other local jurisdictions and plans by other local jurisdictions, and comply with regional, state, and federal plans and regulations.
- 
- Policy 32.4** Periodically update Comprehensive Plan policies to account for changes in public policy, community priorities, state and federal law, and demographic, environmental, economic, natural hazard, or other conditions in order to ensure that the Plan is an accurate and effective guide for future growth.
- 
- Policy 32.5** Periodically review and revise the Development Code to ensure that the City is able to implement new best practices in construction, and that code provisions are adequate to address the goals and policies of the City Master Plans and Comprehensive Plan.
- 
- Policy 32.6** Effectively communicate and engage partner organizations, residents, property owners, and businesses when revising the Comprehensive Plan and Development Code.
- 
- Policy 32.7** Ensure the City Council considers the Comprehensive Plan goals and policies during its annual goal setting process and during budgeting and other policy-making processes.
- 
- Policy 32.8** Advance resource efficiency, renewable energy, and reduction of nonrenewable energy use when areas are urbanized or are being redeveloped at higher densities.



# ECONOMY & HOUSING







# CURRENT CONDITIONS

The demographic characteristics of Sandy residents provide a basis for understanding housing and economic development trends and the factors that may affect future growth in Sandy.

## POPULATION GROWTH

Sandy’s population growth will drive future demand for housing and employment in the city. Sandy’s population more than doubled between 2000 and 2021. Sandy’s population was 13,877 in 2023. Since 2000, Sandy’s population grew by 7,484 people at an average annual growth rate of 4.2%.<sup>1</sup> Based on the City’s 2024 Housing Capacity Analysis (HCA), Sandy is forecast to grow by 6,350 people through 2043, at an average annual growth rate of 1.9%.

## AGE CHANGE

Over the last twenty years, the working-aged population (25-64 years) had the most substantial increases. Sandy’s population is younger than the state and county with lower shares of seniors over age 60 and higher shares of residents 39 years or younger. However, the median age in Sandy has increased by almost four years to 36.2 years in 2019.

By 2040, Clackamas County is expected to have a larger share of residents 40 years and older than it does today. The share of residents 60 years and older will likely account for 29% of Clackamas County’s population, compared to 27% in 2020. Similarly, the share of residents between the ages of 40 and 59 is expected to slightly increase from 27% to 28%.



<sup>1</sup> Portland State University Population Estimates, 2021.

## RACE AND ETHNICITY

Sandy has become more diverse with an increased share of people of color and substantial growth in the Hispanic/Latino population. However, the city is less racially diverse than the state overall. Sandy's Hispanic/Latino population increased between 2000 and 2015–2019 from 4% to 10%. The share of people of color in Sandy was 9%, compared with the county average of 12% and statewide average of 16%. Clackamas County and Sandy are less ethnically diverse than the state overall, even with their increases from 2000 to 2015-2019.

## HOUSEHOLD COMPOSITION

In comparison to the county and state, Sandy's households are on average larger with nearly half of the households consisting of 3 or more people. Sandy has a higher percentage of households with children than the county and state. Sandy's average household size is larger than both Clackamas County and the state. Sandy also has a greater share of households with children than the county or state. Approximately 40% of households in Sandy have children compared to 28% in the county and 25% in the state.

## INCOME AND EDUCATION

Sandy's median household income increased between 1999 and 2019 from \$42,115 to \$73,443 per year<sup>2</sup> (approximately a 74% increase). The median household income in Sandy was 9.6% below Clackamas County's median household income but 14.5% above Oregon's median household income.

The share of Sandy residents who have a bachelor's degree or a professional degree falls below both the state and Clackamas County (2015-2019) averages by almost 15%.



<sup>2</sup> City of Sandy Urbanization Study (CSUS, 2015). January 2015. Ordinance 2015-01.





## FUTURE TRENDS AND DRIVERS OF CHANGE

The city has experienced tremendous growth, more than doubling in size since 2000 to support almost 13,000 residents, earning a reputation as one of the fastest growing cities in Oregon with an annual growth four times the State of Oregon's rate. While Sandy is still forecasted to grow to approximately 20,227 people by 2043, this population growth will occur at a slower rate than in the past. Historical population growth led to a high demand for housing. The limited supply of housing combined with population growth, and continuously rising housing and lending costs, led to an increase in cost burden for residents particularly those renting. This has implications for Sandy's workforce and general employment trends.

### MAJOR HOUSING TRENDS

Based on the City's 2024 Housing Capacity Analysis (HCA), Sandy needs to plan for 2,424 new dwelling units or about 121 new dwelling units per year to accommodate the city's forecasted population growth of 6,350 people over the twenty-year planning period. The housing mix for this growth is expected to consist of 60% single-family detached homes, 7% townhouses, 5% duplexes, triplexes, and quadplexes, and 28% multi-dwelling housing with five or more units in each structure.

This housing mix aligns with Sandy's anticipated need for a broader range of housing types at a wider range of price points than is currently

available in Sandy's housing stock, which is predominantly (79%) single-family detached homes. To provide opportunities for people to live and work in Sandy, there needs to be more housing that is affordable to people with jobs in Sandy.

Fortunately, Sandy has sufficient land to accommodate population growth over the twenty-year planning period. The forecasted growth of 6,350 people will result in the demand for 2,424 new dwelling units over the twenty-year planning period, averaging 121 new dwelling units annually. While the HCA indicates Sandy has sufficient land in all plan designations to meet projected growth, the R-2 zone is low on capacity.

The 2024 HCA identified the following trends and key housing needs in Sandy over the next twenty years:

- Demographic changes suggest a shift in housing demand toward smaller, more affordable housing for both rent and ownership. Sandy's existing housing mix is predominately single-family detached. However, key demographic and socioeconomic trends that will affect Sandy's future housing needs are increasing housing costs and housing affordability concerns for millennials, Generation Z, and Latino populations as well as an aging population. The implications of these trends are increased demand for affordable housing for families and smaller, older (often single person) households.

» Sandy needs more affordable housing types for potential homeowners. Housing sales prices increased in Sandy over the last seven years. Between 2015 and 2022, the median sales price in Sandy increased by \$211,000 (80%). A household earning 100% of Clackamas County's median family income (\$114,400) could afford a home valued between about \$315,000 and \$372,000, which is less than Sandy's median home sales price of \$475,000. A household can afford median home sales prices in Sandy at about 128% (\$146,000) of Clackamas County's median family income (MFI). Average wages in Sandy are also not high enough to pay for the median home sales price of \$475,000. In 2021, the overall average wage for people working at a business located in Sandy was \$43,856. Even two-worker households with relatively high-wage jobs cannot afford the median home sales price. Between 2015 and 2020, the median household income increased 33%. Between 2015 and 2022 the median home sales price rose by 80%.



» Sandy needs more affordable housing types for renters. To afford the average asking rent of a multi-dwelling unit of \$1,840 (which includes basic utilities), a household would need to earn about \$73,600 or 64% of the region's Median Family Income (MFI). About 44% of Sandy's households earn less than \$73,600 and cannot afford these rents. In addition, about 17% of Sandy's households have incomes of less than \$34,320 (30% of MFI) and are at risk of becoming houseless. Households need to have at least two people working average-wage jobs (or above) to afford the average asking rent plus utilities. In 2021, the overall average wage for people working at a business located in Sandy was \$43,856. Single-worker households or two-worker households with lower-wage jobs cannot afford this rent. Between 2015 and 2020, the median household income for renter households decreased 10%. Between 2015 and 2022, the average asking rent increased 41%.

## MAJOR ECONOMIC TRENDS

Based on the City's 2024 Economic Opportunities Analysis (EOA), Sandy's employment base is 5,514 employees in 2023. Sandy is forecast to have 8,037 employees by 2043. This is an increase of 2,523 jobs over the planning period.

Most new employment will require commercial and industrial lands, accounting for over 90% of new employment growth (2,339 employees) over the 2023 and 2043 planning period. Sandy will accommodate new government employees (184 of the 2,523 employees) in existing government buildings and areas designated for public use.

The forecast for land needed to accommodate employment growth in Sandy shows that the growth of 2,523 new employees will result in demand for about 154 gross acres of commercial and industrial employment lands.

Sandy has sufficient land to accommodate demand for commercial employment in the Sandy UGB, but it does not have sufficient land to accommodate demand for industrial employment. Based on land demand, Sandy is forecast to have a 52-gross-acre surplus of commercial land and a 9-gross-acre deficit of industrial land.

### The 2024 EOA identifies Sandy's primary competitive advantages to be:

- The city's proximity to both outdoor recreation and urban amenities in Greater Portland make Sandy an attractive place to live and grow businesses.
- The city's plans for investment along Pleasant Street could help encourage pedestrian activity, which could have a positive effect on downtown businesses.
- SandyNet (Municipal Broadband) offers access to high-speed internet, which is an increasingly high priority for most businesses.
- Sandy's location along Highway 26 and proximity to the Portland region provide opportunities for relatively easy freight movement and allow businesses in Sandy to attract workers from across the region.
- SandyNet could also help attract remote workers who may not work for a business in Sandy but want to live in Sandy, as well as new home-based businesses.

These factors make Sandy attractive to residents and businesses that want a high quality of life where they live and work.

The types of businesses that have potential for growth in Sandy include (but are not limited to) manufacturers (particularly food and beverage processing and outdoor equipment manufacturing), professional service companies, service for residents (such as retail, restaurants, medical services, or childcare services), and services for visitors (such as hotels, restaurants, specialty retail, and experiences).





## Economy and Housing GOALS AND POLICIES

### **In 2050, Sandy is home to desirable neighborhoods and a strong workforce.**

Thriving commercial and industrial districts provide balanced employment opportunities at all levels. A variety of businesses meet the daily needs of residents and contribute to Sandy's sense of place. A strong tourism industry provides opportunities for businesses and supports the local economy. Sandy's workers have access to a variety of housing choices that allow residents to move in, move up or age in place, ensuring families can live, work, and thrive in Sandy across multiple generations. Balanced housing choices contribute to safe, walkable, family-friendly neighborhoods that connect residents to nearby parks, trails, businesses, and key destinations.



## ECONOMIC DEVELOPMENT

**GOAL 33: Provide opportunities for a diverse range of businesses to thrive in Sandy, ensuring broader access to economic opportunity and maintaining Sandy's high quality of life consistent with the Economic Development Strategic Plan.**

- Policy 33.1** Coordinate economic development efforts with other jurisdictions and agencies such as Clackamas County, the Port of Portland, the Oregon Economic Development Department, Travel Oregon, and the Oregon Department of Transportation to identify and support expansion of existing industries and attraction of new industries to the community.
- 
- Policy 33.2** Foster entrepreneurship and new business creation by leveraging investments in technology, strengthening economic development partnerships, and connecting businesses to resources.
- 
- Policy 33.3** Attract businesses offering jobs that pay higher than Clackamas County's average wage, to provide opportunities for people to live and work in Sandy, focusing on industries such as metals fabrication, outdoor tools manufacturing, and related professional services.
- 
- Policy 33.4** Partner with local and regional organizations such as Mount Hood Community College, Clackamas Community College, AntFarm Youth Services, Oregon Trail School District, and Clackamas Workforce Partnership to support workforce development, especially for youth and disadvantaged workers, aligning with Sandy's economic development goals and the needs of local businesses.
- 
- Policy 33.5** Promote access to healthcare, childcare, job training, and support systems for Sandy residents.

## Commercial

**GOAL 34: Foster vibrant commercial zones with a mix of retail options that serve the needs of regional residents and enhance destination appeal.**

- Policy 34.1** Invest in the development of a lively, walkable downtown to support a mixture of professional services, hospitality and food services, and retail uses.
- 
- Policy 34.2** Support and encourage infill and redevelopment, particularly in downtown along Pioneer Boulevard, Proctor Boulevard, and Pleasant Street, as a way to use land and existing infrastructure more efficiently.
- 
- Policy 34.3** Use large undeveloped commercial areas to support a range of retail businesses, with an emphasis on ensuring the availability of space for large retailers integrated with smaller commercial uses.

**Policy 34.4** Encourage and support a variety of retail, restaurant, lodging, and recreational services to draw visitors and enhance community well-being for residents through strategic investments in hospitality, place-based tourism, and community development.

**Policy 34.5** Monitor land development and update the buildable lands inventory on a regular basis to ensure that there is enough vacant commercial land to accommodate expected growth.

## Industrial

**GOAL 35: Promote sustainable and non-polluting industrial growth that diversifies Sandy's economic base, supports high-wage job creation, and cultivates innovation.**

**Policy 35.1** Ensure that Sandy has sufficient industrial land to provide industrial growth opportunities, with a variety of characteristics and sizes and with adequate access to transportation and utility facilities, but avoiding conflicts with incompatible adjacent uses.

**Policy 35.2** Preserve and protect industrial lands in locations with direct access to the highway, particularly parcels 10 acres and larger, so that this land is more likely to be used for traded-sector industrial uses. Limit commercial development in industrial areas to uses which are clearly ancillary and subordinate to industrial development.

**Policy 35.3** Work with economic development partners to support the development of metals fabrication and related industries in Sandy and to establish Sandy as a hub for metals fabrication.

**Policy 35.4** Encourage collaboration between businesses and innovators in specialty food and beverage industries to strengthen Sandy's food storage and processing sector.

**Policy 35.5** Monitor industrial land development and update the buildable lands inventory on a regular basis to ensure that there is enough vacant industrial land to accommodate expected growth.

## Infrastructure

**GOAL 36: Ensure that Sandy has sufficient infrastructure capacity to support a variety of employment opportunities, ensuring that land can be developed within a reasonable time period.**

**Policy 36.1** Coordinate capital improvement planning with economic development planning to ensure infrastructure availability to employment lands.

**Policy 36.2** Coordinate with providers of infrastructure not provided by the City, such as electricity and natural gas, to ensure service is available when needed.

**Policy 36.3** Invest in SandyNet and other resources and infrastructure that support and attract a home-based workforce.

## HOUSING

**GOAL 37: Maintain an adequate supply of developable land to allow for the development of a balance of diverse housing types, providing opportunities for people to live and work in Sandy and meet the forecast of population growth over the next 20 years.**

**Policy 37.1** Ensure that there is sufficient land in each residential plan designation to meet the land needs identified in the Housing Capacity Analysis, as required by Statewide Planning Goal 10.

**Policy 37.2** Continue to meet State requirements for supporting housing development while maintaining a balance of densities.

**Policy 37.3** Ensure there are opportunities for public input on proposed housing development per the City's land use review procedures.

**Policy 37.4** Allow for development of a range of housing types both for ownership and rental, that allow people to live and work in Sandy.

**Policy 37.5** As required by State legislation, identify barriers to private sector housing development for a range of housing types, including affordable housing, and develop policies to reduce development barriers.

**Policy 37.6** Coordinate capital improvements and funding with housing planning to ensure infrastructure availability to residential land.

**Policy 37.7** Implement public-private development agreements to recover initial costs of infrastructure and maintenance obligations, when appropriate.

## **GOAL 38: Provide residential districts that allow diverse housing types, including opportunities for mixed-use development.**

### **Policy 38.1**

As required by State legislation, identify, and remove barriers to developing needed housing types according to where they are allowed.

### **Policy 38.2**

Maintain mixed-use village plan designations at Bornstedt Village and at Highway 26 / Dubarko Road, with development around a commercial center or other focal point and residential densities that generally decrease with distance from the commercial center.

### **Policy 38.3**

Reclassify the mixed-use village plan designation at Kelso Road / Bluff Road to eliminate commercial and promote additional housing.

### **Policy 38.4**

Locate multifamily housing near commercial development, schools, and planned transit routes to reduce automobile travel.

### **Policy 38.5**

Ensure that permitted housing types are appropriately related to site conditions, including slopes, potential hazards, and natural resources.

## **GOAL 39: Provide opportunities for and support development of housing at prices that meet the needs of current and future residents of Sandy.**

### **Policy 39.1**

Consistent with State requirements, identify barriers to development of both income-restricted affordable housing and middle-income affordable housing and develop policies to reduce development barriers.

### **Policy 39.2**

Maintain a balance of low, medium, and high-density zones to provide housing at a range of costs and allow for housing choice.

### **Policy 39.3**

Support development of income-restricted housing through partnering with Clackamas County Housing Authority, and other non-profit or for-profit developers of low-income affordable housing.

### **Policy 39.4**

Identify approaches to support development of affordable housing by using tools that reduce development or operational costs as part of the state required Housing Production Strategy.









ENVISION SANDY 2050  
COMPREHENSIVE PLAN

# Appendix

I. Comprehensive Plan Map and Zoning Map

II. Reference Documents



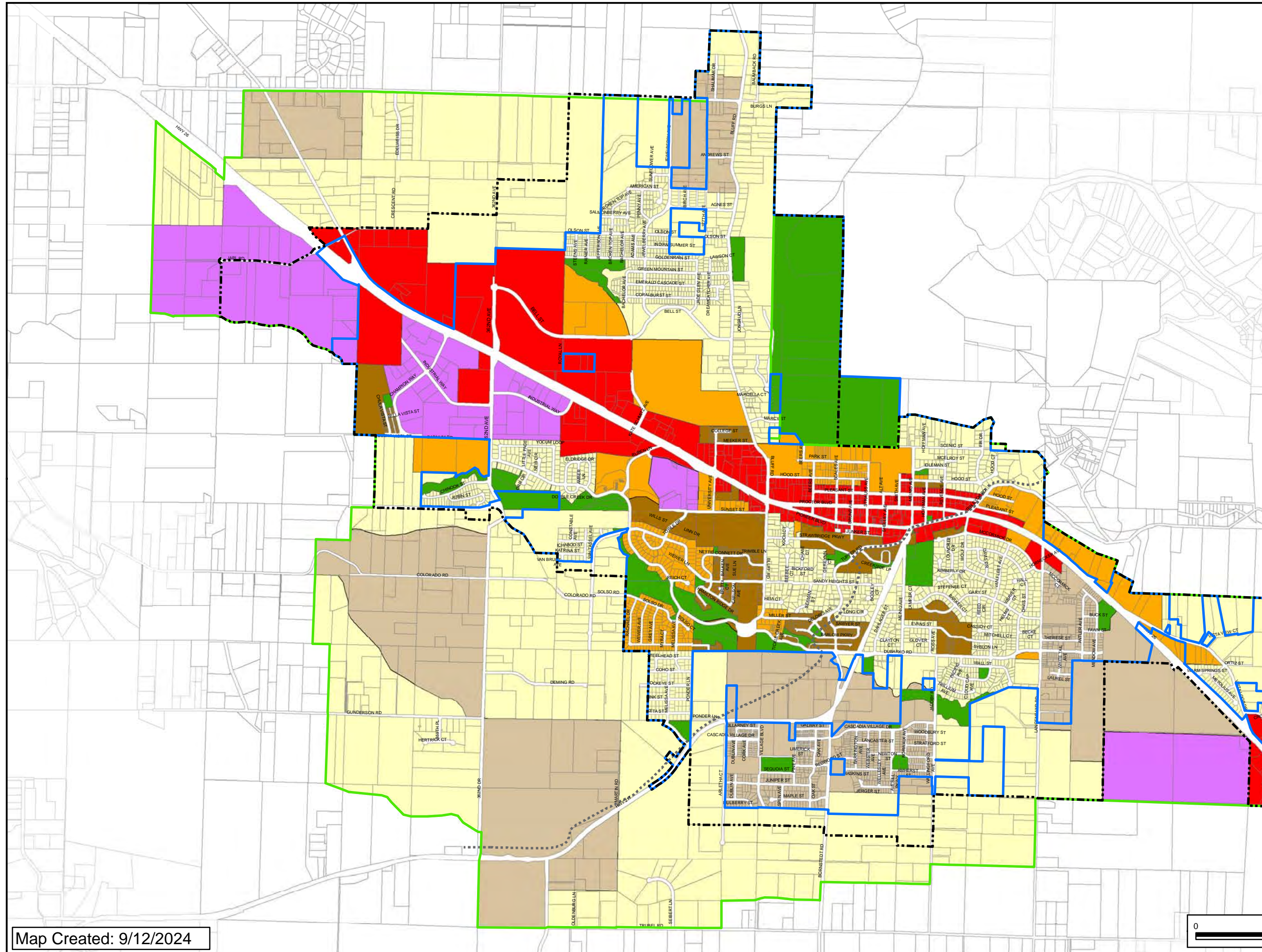


**Legend**

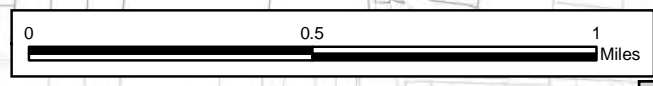
- UGB
- City Limits
- Urban Reserve
- Barlow Road

**Comprehensive Plan Designation**

- Village
- Low Density Residential
- Medium Density Residential
- High Density Residential
- Commercial
- Industrial
- Parks and Open Space



Map Created: 9/12/2024



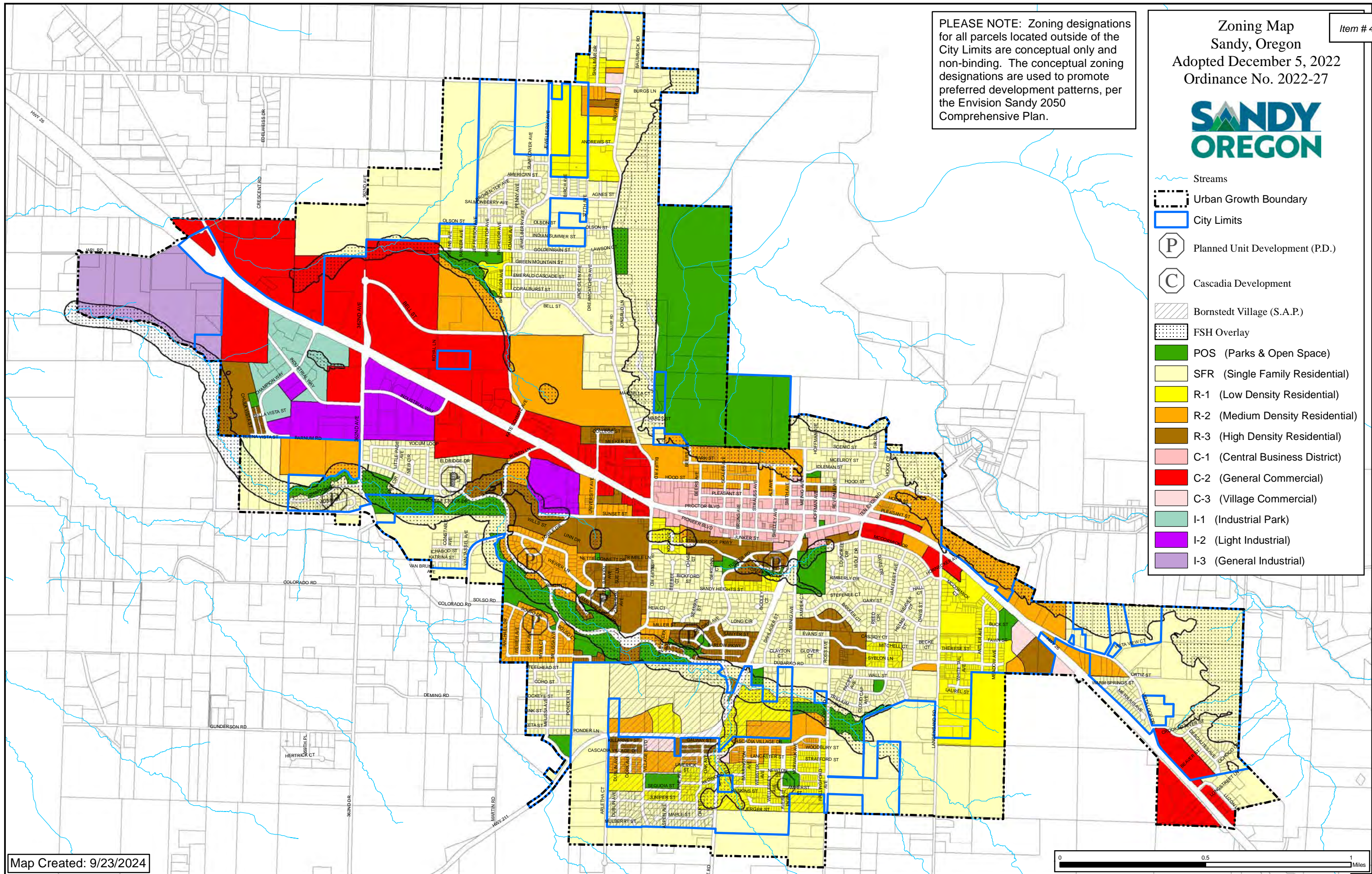


### Zoning Map Sandy, Oregon Adopted December 5, 2022 Ordinance No. 2022-27

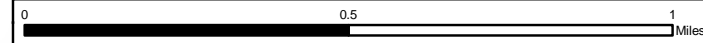


PLEASE NOTE: Zoning designations for all parcels located outside of the City Limits are conceptual only and non-binding. The conceptual zoning designations are used to promote preferred development patterns, per the Envision Sandy 2050 Comprehensive Plan.

- Streams
- Urban Growth Boundary
- City Limits
- Planned Unit Development (P.D.)
- Cascadia Development
- Bornstedt Village (S.A.P.)
- FSH Overlay
- POS (Parks & Open Space)
- SFR (Single Family Residential)
- R-1 (Low Density Residential)
- R-2 (Medium Density Residential)
- R-3 (High Density Residential)
- C-1 (Central Business District)
- C-2 (General Commercial)
- C-3 (Village Commercial)
- I-1 (Industrial Park)
- I-2 (Light Industrial)
- I-3 (General Industrial)



Map Created: 9/23/2024





# APPENDIX II: REFERENCE DOCUMENTS

## Adopted Amendments to the Comprehensive Plan

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- 2002 Locally Significant Wetlands Determination (Ordinance No. 2002-18)
- 2003 Bornstedt Village Specific Area Plan (Ordinance No. 2003-09)
- 2016 Water Management and Conservation Plan (Ordinance No. 2023-06)
- 2017 Urban Growth Boundary Expansion Analysis (Ordinance No. 2017-02)
- 2020 Transit Master Plan (Resolution No. 2020-07)
- 2021 Parks and Trails Master Plan (Ordinance No. 2021-26)
- 2022 Water System Master Plan (Ordinance No. 2023-06)
- 2023 Transportation System Master Plan (Ordinance No. 2023-24)
- 2024 Economic Opportunity Analysis (Ordinance No. 2024-02)
- 2024 Housing Capacity Analysis (Ordinance No. 2024-03)

## Reference Documents

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- 1997 IGA on Green Corridor and Rural Reserve (adopted by signature)
- 2001 Urban Growth Management Agreement (adopted by signature)
- 2012 Downtown Parking Management Study (adopted by motion)
- 2023 Economic Development Strategic Plan (adopted by motion)
- 2024 City of Sandy Addendum to the Clackamas County Multi-Jurisdictional Natural Hazard Mitigation Plan Effective



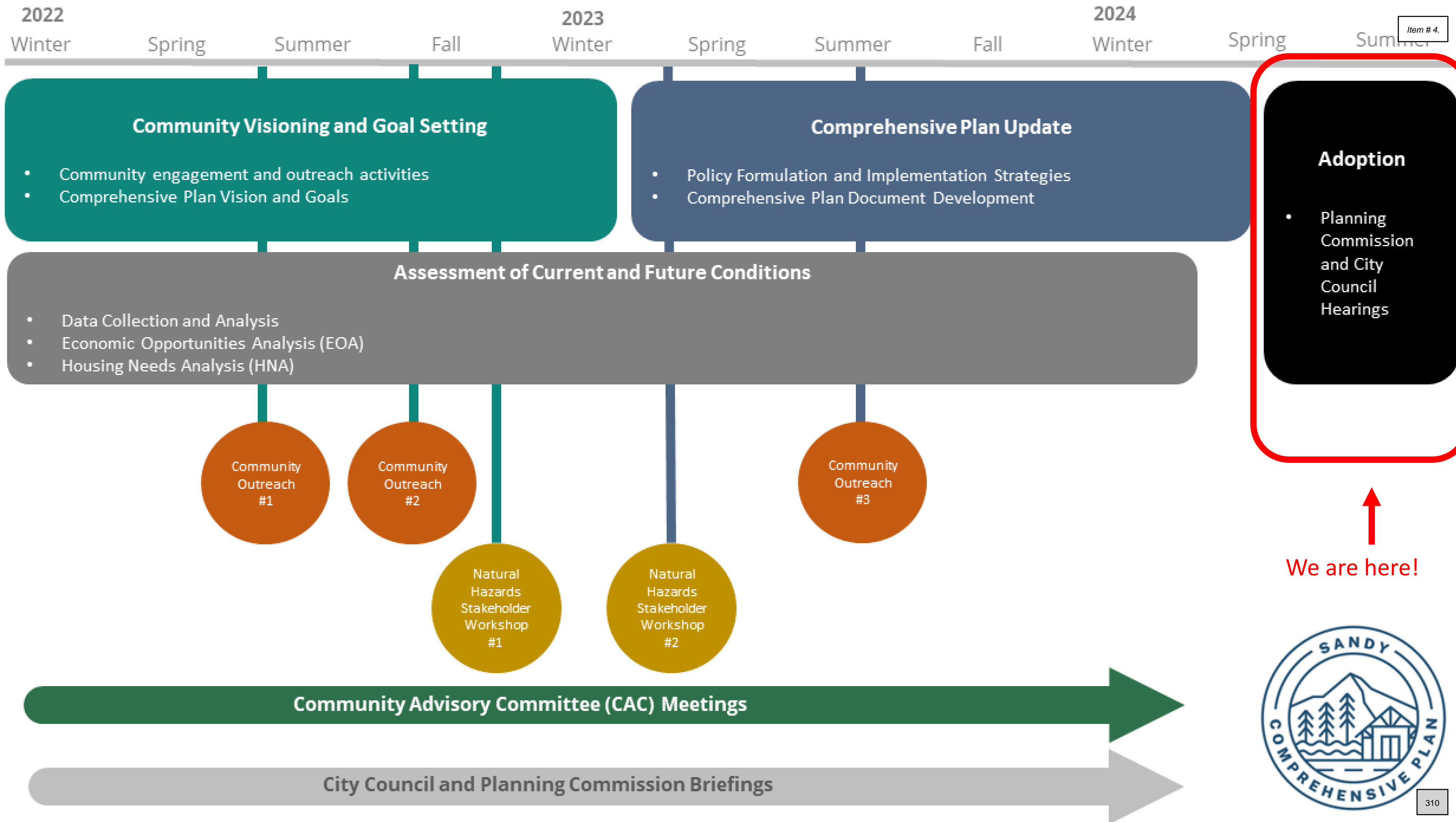


# ENVISION SANDY 2050

*Sandy City Council Hearing  
October 7<sup>th</sup>, 2024*









# Envision Sandy 2050 Process





















# Envision Sandy 2050 Vision Statement



## Community and Culture

In 2050, Sandy retains its small-town feel through a celebration of community and place. Downtown Sandy is a clean, walkable, and vibrant place to dine, shop, and gather. The beautification of downtown showcases public art, honors Sandy's history, and celebrates its location as "The Gateway to Mt. Hood." Public amenities and facilities provide places to play, grow, and learn for residents of all ages. Sandy supports events like the Sandy Mountain Festival that bring people together and promote a spirit of inclusivity. Non-profit and volunteer organizations offer meaningful services to the community and provide opportunities for civic engagement.



## Transportation and Infrastructure

In 2050, Sandy boasts modern and reliable public facilities and services that support carefully planned growth. The City invests in infrastructure that provides clean drinking water, treats wastewater while protecting our watersheds, and mitigates the effects of stormwater runoff. The expansion, operation, and maintenance of public services is supported through sustainable and balanced funding sources. SandyNet continues to provide reliable, fast and state-of-the-art internet service to the City's residents. Sandy's transportation system prioritizes safety, connectivity, and accessibility, with an emphasis on local street connections to reduce reliance on arterial roads such as Highways 26 and 211 for local trips. Safe, efficient, high-quality transit service, as well as a network of sidewalks and bike facilities, provides an alternative to private automobile use, supporting efficient use of roadways and reducing air pollution and energy use.



## Natural Hazards and Resiliency

In 2050, Sandy is resilient in the face of natural hazards. As stewards of clean air, water, and land resources for future generations, Sandy guides the design of the built environment to protect, enhance, and be integrated with natural systems. The threat of natural hazards like wildfire and earthquakes is mitigated through emergency preparedness, education, and proactive planning. Sandy collaborates with local agencies, including Fire Districts, Clackamas County, and regional partners to plan for actions that can lessen the impact of natural hazards, ensuring the City and its partners have long-term strategies for protecting the community.



## Parks, Trails and Natural Resources

In 2050, Sandy's natural and scenic landscape is an extension of the community. Clean rivers, healthy trees, and wildlife habitats are carefully conserved to promote biodiversity. Forested areas within the City are protected as parks, trails and natural open space. Sandy preserves the unique character and charm of beloved assets like Meinig Memorial Park, Sandy River Park, the Tickle Creek Trail, and Jonsrud Viewpoint. The City continues to develop recreation programs and a diverse and accessible park and trail system that is clean, safe, and functional, serving the needs of residents.



## Governance and Growth Management

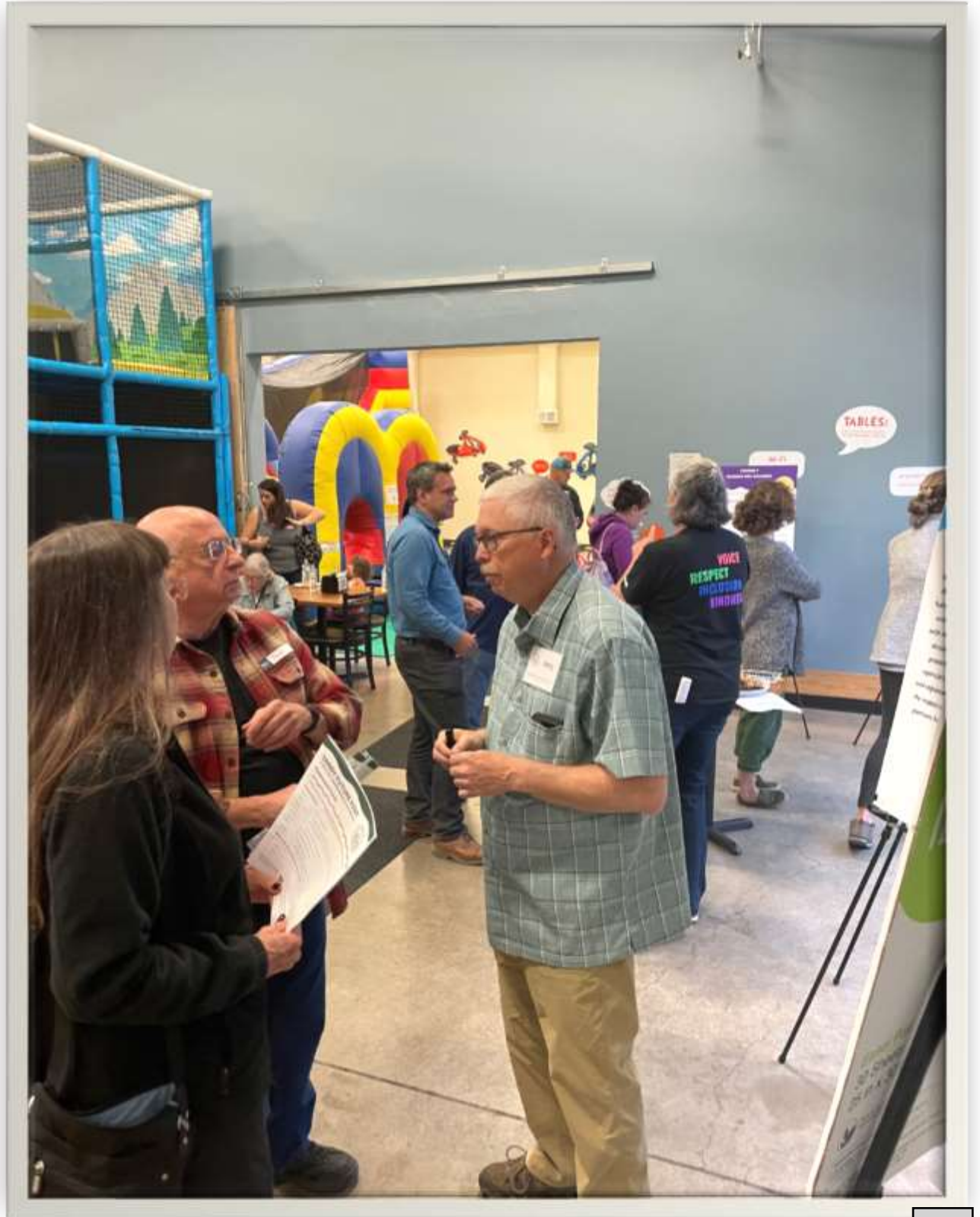
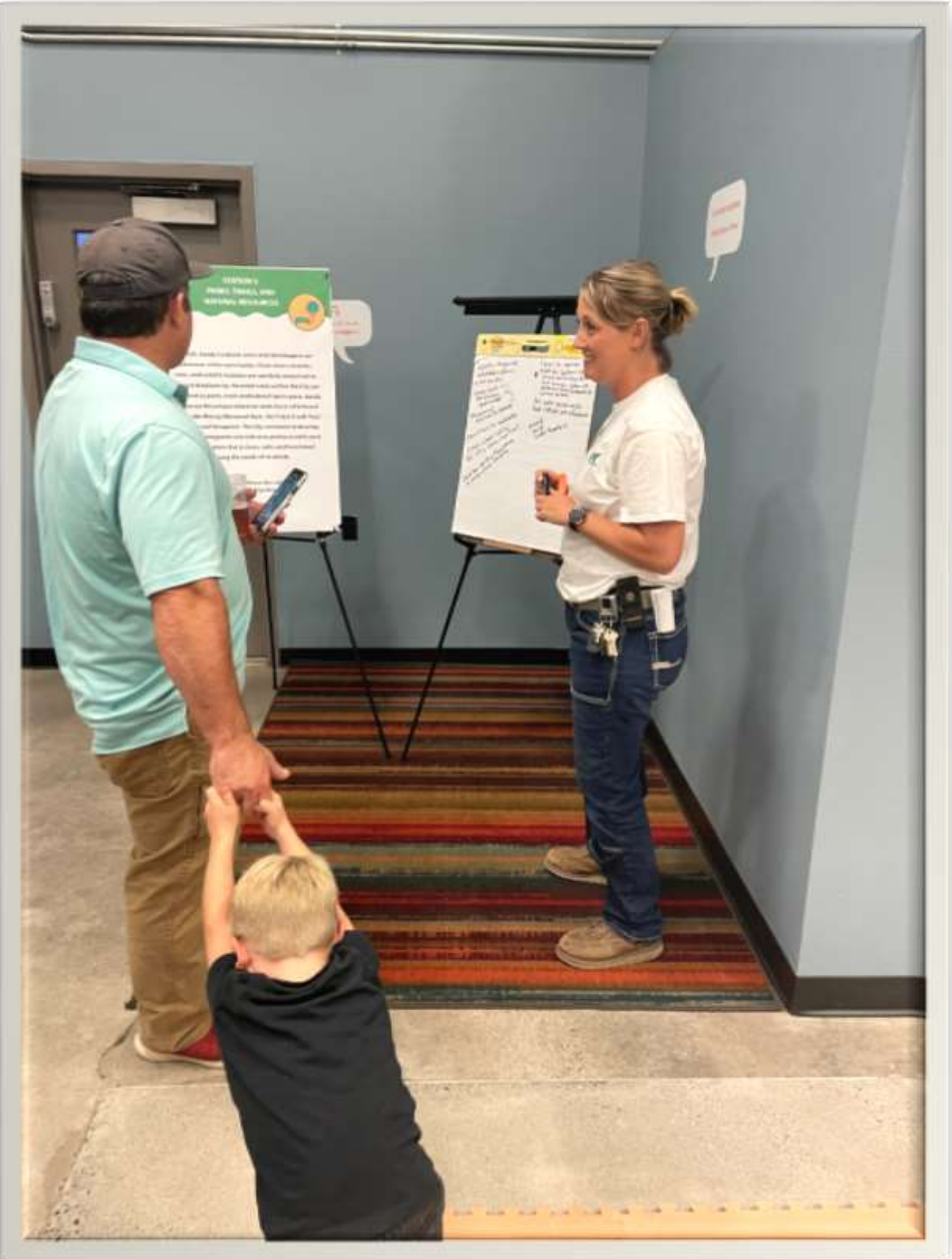
In 2050, Sandy is proactive in managing and planning for growth. Sandy is an innovative community that addresses change through thoughtful planning and effective governance. Growth and development are guided by community values, fiscal responsibility, and strategic investments in services and infrastructure. Premier fire, police and emergency response services ensure safety for residents. Regulatory tools and practices are consistently updated to address new issues, and new development contributes to the expansion of public utilities. Leadership and residents engage with one another in decision-making processes so new opportunities benefit the community while preserving Sandy's small-town feel.



## Economy & Housing

In 2050, Sandy is home to desirable neighborhoods and a strong workforce. Thriving commercial and industrial districts provide balanced employment opportunities at all levels. A variety of businesses meet the daily needs of residents and contribute to Sandy's sense of place. A strong tourism industry provides opportunities for businesses and supports the local economy. Sandy's workers have access to a variety of housing choices that allow residents to move in, move up or age in place, ensuring families can live, work, and thrive in Sandy across multiple generations. Balanced housing choices contribute to safe, walkable, family-friendly neighborhoods that connect residents to nearby parks, trails, businesses and key destinations.











# “Big Ideas”



## Community and Culture

- Community Center
- Events/activities for kids and seniors
- Enhance downtown

## Governance and Growth Management

- Responsible growth
- Maintain and update current facilities
- Developer responsibility

## Housing and Economy

- Small business spaces
- More jobs close to home
- Affordable, safe, and spacious housing

## Transportation and Infrastructure

- Wider local streets
- Expand sidewalk network and crossings
- Speed limit reductions and enforcement

## Natural Hazards

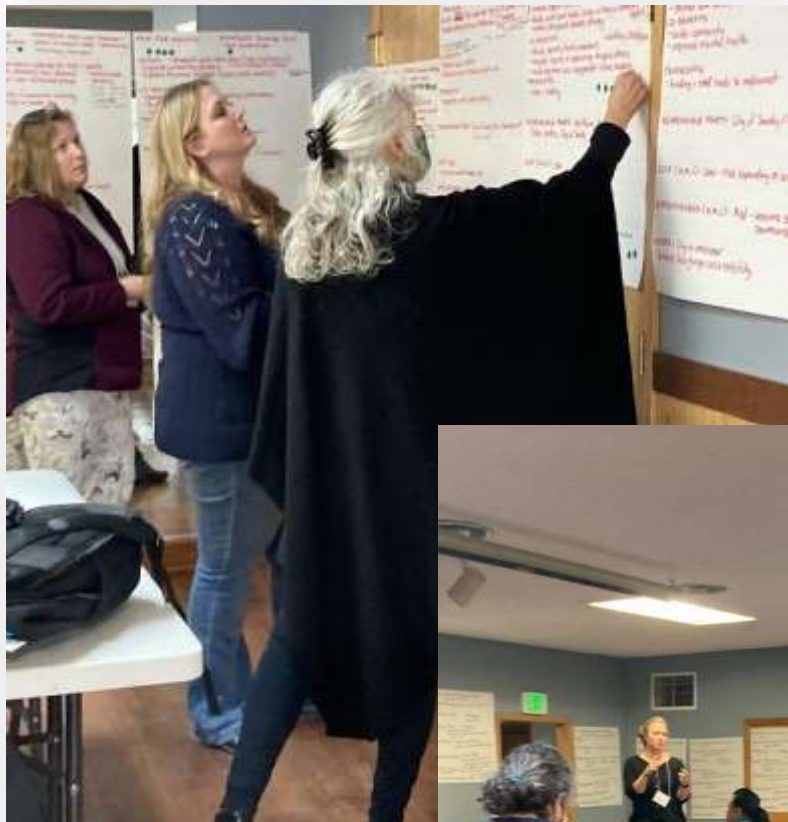
- Event strategies
- Communication system
- Prevention incentives, ideas, and code enforcement

## Parks, Trails, and Natural Resources

- Improve pedestrian and ADA safety
- Weatherized playgrounds and parks
- Continue to improve connectivity of trails and paths

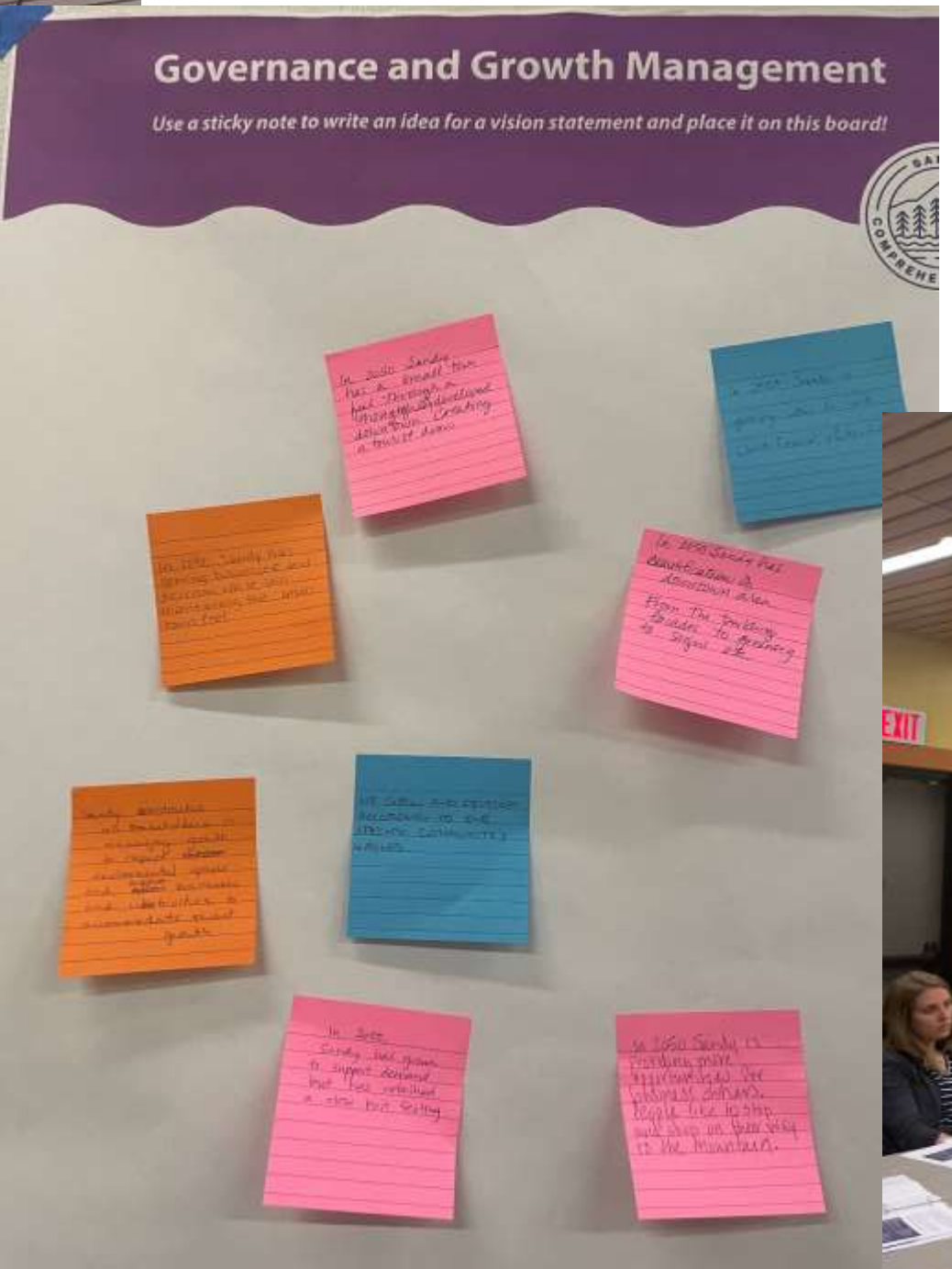


# Natural Hazards Stakeholder Workshops—*Developing priorities and strategies*





# Putting it all together: *the role of the Community Advisory Committee (CAC)*





# **NEW Sandy Comprehensive Plan (Final Document)**

# Organization of the new Sandy Comprehensive Plan

Vision Theme/Comprehensive Plan Chapter	Applicable Statewide Planning Goals
 <b>Community and Culture</b>	Goal 1: Citizen Involvement Goal 5: Cultural and Historic Resources
 <b>Transportation and Infrastructure</b>	Goal 12: Transportation Goal 11: Public Facilities and Services Goal 13: Energy Conservation
 <b>Parks, Trails and Natural Resources</b>	Goal 8: Recreational Needs Goal 5: Natural Resources and Open Space
 <b>Natural Hazards and Resiliency</b>	Goal 7: Natural Hazards Goal 6: Air, Water and Land Resource Quality Goal 13: Energy Conservation
 <b>Housing and Economy</b>	Goal 9 Economic Development Goal 10: Housing
 <b>Governance and Growth Management</b>	Goal 14: Urbanization Goal 2: Land Use Planning Goal 1: Citizen Involvement

6 Vision Themes

2-5 Goals per Vision Theme

4-10 Policies per Goal

*Implementation strategies for policies, as needed*



# Envision Sandy 2050 Comprehensive Plan

August 2024



## ENVISION SANDY 2050 | SANDY COMPREHENSIVE PLAN

1853

Sandy's first settlers, the Francis Revenue family, arrived in **1853** and soon opened a trading post on the Barlow Road which served thousands of pioneers who traveled through on their way to the Willamette Valley. John and Francis Revenue started building a log schoolhouse and in 1870 the Revenue School District, No. 6 was formed. In 1874 Francis Revenue built the Revenue Hotel. It was Sandy's first hotel.



1894

### SANDY'S ECONOMY

According to local historians, there is no question that Sandy's heritage was founded on logging and sawmilling. Early residents used to say, "there was a sawmill behind every stump". Sandy's rugged terrain did not attract farming, but it was blessed with a thick cover of beautiful old growth timber. The harvesting and processing sustained the area's economy for many years. At one time or another there were more than 60 sawmills in the area. In addition, there were many logging camps to support the industry. This industry not only brought money to the area but also employed many of the residents.



As more and more sawmills opened up, additional specialty shops and tradesmen were needed. Robert Jonsrud started a blacksmith shop in Sandy in **1894** when he was 21 years old. His shop was on the north side of present Pioneer Blvd. between Shelly and Straus Avenues. His specialty was horseshoeing and wagon-repair work.

The primary way logs would be "yarded" out of the woods was by a team of horses. One of the largest sawmills in the area was the Sandy Fir Lumber Company. The sawmill was located just outside of Sandy on Tickle Creek and was owned by John Straus and W.A. Proctor.

## ENVISION SANDY 2050 | SANDY COMPREHENSIVE PLAN

### TRANSPORTATION

#### Mobility & Connectivity

**GOAL 1: Provide a transportation system that prioritizes mobility and connectivity for all users.**

- Policy 1.1** Maintain the livability of Sandy through well connected transportation facilities.
- Policy 1.2** Improve the safety and accessibility of transit amenities.
- Policy 1.3** Improve the vehicular/pedestrian interface along all arterial and collector streets.
- Policy 1.4** Ensure sufficient capacity to accommodate future travel demand (auto, transit, bicycle, pedestrian, etc.) to, within, and through the City of Sandy.
- Policy 1.5** Emphasize local street connections and minimize access along the City's arterials to reduce reliance on US 26 and OR 211 for local trips.

#### Capital Investments and Funding

**GOAL 2: Promote cost effective investments in the transportation system.**

- Policy 2.1** Optimize the use, performance, and value of existing facilities while planning for future infrastructure.
- Policy 2.2** Seek opportunities to combine transportation, other infrastructure, and environmental mitigation projects.
- Policy 2.3** Maximize the use of state and federal funds for transportation capital, operating, and service improvements.
- Policy 2.4** Maintain a capital improvement plan that identifies construction priorities and funding.

## ENVISION SANDY 2050 | SANDY COMPREHENSIVE PLAN

### Low Density Residential and Single Family Residential

Low Density Residential (R-1) district is intended for 8 dwelling units per net acre. Intended uses include duplexes, manufactured homes, and single family detached residential dwellings. The Single Family Residential (SFR) district is intended for 8 dwelling units per net acre. Intended uses include single family detached dwellings. Low Density Residential and Single Family Residential are typically located outside of the commercial districts. Additional neighborhood design architectural styles and building materials are encouraged to ensure future residential development fully designed to integrate with

established neighborhoods in terms of density and house design. Street patterns in the LDR district are characterized by curvilinear alignments and cul-de-sacs because of the topography in Sandy. The public streetscape is a major defining element of an LDR district neighborhood. This land use designation relies on the car for most trips, and on the school bus for getting to and from school. This development pattern remains popular with families in Sandy for the generously sized private yards and quiet streets. The LDR Comprehensive Plan designation encompasses two zoning district designations.





# Key updates to the Final Comprehensive Plan Document

- Updated List of Acknowledgements
- Replaced updated Comprehensive Plan and Zoning maps (*note that no property rezoning or plan changes have occurred in this process*)
- Reorganized images in the Timeline section and clarified key dates
- Spelled out acronyms
- Clarified description of AntFarm
- Made grammar edits, including commas, periods and quotation marks
- Made layout edits, including removing extra paragraph spaces



## Key Considerations

- Does the Envision Sandy 2050 Comprehensive Plan accurately reflect your understanding of the priorities uncovered during the community visioning process?
- Do the goals and policies accurately reflect your understanding of the factual basis and trends from supporting reference documents, and capture revisions discussed in prior joint work sessions?
- Does City Council approve **Ordinance 24-040 CPA**, adopting the *Envision Sandy 2050* update to the Comprehensive Plan text?

# Looking Ahead

- Codify the new Comprehensive Plan in zoning and development code
- Review and adopt the Resiliency Action Plan
- Continue to build relationships with community members who participated in the process
- Track progress – celebrate the wins!

# Thank You!



# STAFF REPORT

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**Meeting Type:** City Council  
**Meeting Date:** October 7, 2024  
**From:** Jennifer Coker, Public Works Director  
**Subject:** Contract Approval: Engineering Services for Alder Creek Water Treatment Plant Upgrades

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## DECISION TO BE MADE:

Whether to authorize the City Manager to execute contracts for Engineering Design Services for the Alder Creek Water Treatment Plant.

## BACKGROUND / CONTEXT:

As part of the Water System Master Plan Update, which was approved by the Oregon Health Authority (OHA) and adopted by the City in November 2022, the City selected Stantec as the Program Manager for its Sandy Drinking Water Reinvestment Program (SDWRP) in the spring of 2023. After consulting with the City, it was determined that stabilizing the Alder Creek Water Treatment Plant (WTP) was an immediate and critical need to ensure reliability. To stabilize the plant's production reliability, necessary upgrades include upgrading the Raw Water Pump Station and constructing new building infrastructure containing new membrane filtration equipment, support facilities, and a new Finished Water Pump Station.

These upgrades to the Alder Creek WTP are occurring concurrently with the Portland to Sandy Water Filtration Plant Transmission System project, which will provide a secure connection to the Bull Run Supply at the Bull Run Filtration Facility. The connection to the Bull Run Filtration Facility and the upgrades to the Alder Creek WTP will provide the City with two reliable sources to secure supply for the near-term future (year 2040) expected treated water demand.

## KEY CONSIDERATIONS / ANALYSIS:

Two engineering firms, Keller and Black & Veatch, responded to a request for proposals for engineering services for the treatment plant upgrades. Proposals were evaluated and ranked by City staff and the program management team. It was determined that Keller Associates was the highest-ranked firm. Keller has a recent history of completing urgent repairs on the Sandercock Reservoir and is currently working on the Effluent Pump Station and W3 Improvements project as part of the Sandy Clean Waters Program (SCWP), contracted on February 9, 2024.



**BUDGET IMPACT:**

The Sandy Drinking Water Reinvestment Program Alder Creek WTP Upgrades project is identified in the water capital appropriations for the BN23\_25 budget and is financed from two funding sources; \$9.5 Million from the Special Public Works Fund and approximately \$6 Million from the Safe Drinking Water Revolving Loan Fund. Repayment will be made from water rate revenues and is included in the water rate model.

This contract is limited to a total maximum fee of \$1,911,200.

**RECOMMENDATION:**

Authorize the City Manager to execute the proposed contract with Keller Associates for engineering services. The not to exceed amount listed in the contract is \$1,911,200.

**SUGGESTED MOTION LANGUAGE:**

"I move to authorize the City Manager to execute a contract with Keller Associates for Engineering Services for Alder Creek Water Treatment Plant upgrades, as provided in the meeting packet."

**LIST OF ATTACHMENTS / EXHIBITS:**

- Contract Keller Associates
- Proposal from Keller Associates
- Notice of Intent to Award – Keller Associates

**CITY OF SANDY, OREGON  
PERSONAL SERVICES AGREEMENT**

THIS PERSONAL SERVICES AGREEMENT (“Agreement”), made and entered into this September 3, 2024, by and between the City of Sandy, an Oregon municipal corporation (“City”) and Keller Associates (“Contractor”).

**RECITALS**

**WHEREAS**, the City’s fiscal year 2023 – 2025 budget provides for investments in the City’s Alder Creek Treatment Plant; and

**WHEREAS**, the City released a request for proposals (RFP) for engineering services for the Alder Creek Water Treatment Plant Upgrades on March 18, 2024; proposals were received from two proposers on May 2, 2024; and selection was made after reviewing the selection committee’s scores based on the criteria listed in the RFP, with a total of 100 points possible.

**WHEREAS**, contract was awarded to Contractor by Sandy’s City Council at their meeting on ~~September 16, 2024~~ **October 7**, 2024; and

**WHEREAS**, City desires to retain Contractor to perform certain professional consulting services, as further identified in this Agreement. Contractor is willing to perform these services for and in connection with Alder Creek Water Treatment Plant Upgrades (the “Project”), subject to and in accordance with the terms and conditions contained in this Agreement.

**WHEREAS**, This project will be funded in part with a financial award from the Special Public Works Fund, funded by the Oregon State Lottery and administered by the Oregon Infrastructure Finance Authority. This project will also be funded with Safe Drinking Water financing and required clauses are included as part of Exhibit C.

**NOW THEREFORE**, in consideration of the promises and covenants contained herein, and for good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties agree as follows:

**AGREEMENT**

**1. Term.**

**8**

This Agreement shall run from October ~~1~~, 2024 through and including May 31, 2027 unless sooner terminated under the provisions of this Agreement, and may be extended for additional like periods. All Services under this Agreement shall be completed prior to the expiration of this Agreement.

## 2. Contractor's Service.

The scope of Contractor's services and time of performance under this Agreement are set forth in Exhibit A (the "Services"). All provisions and covenants contained in Exhibit A are incorporated by reference and are a part of this Agreement as if fully set forth. Any conflict between this Agreement and Exhibit A shall be resolved first in favor of this written Agreement. Contractor will, in the rendering of its services to City, use its best efforts and due diligence and provide such personnel as are necessary to successfully provide the services covered under this Agreement. The parties may only change the scope of services through an amendment. No information, news, or press releases related to the Project shall be made to representatives of newspapers, magazines, television and radio stations, or any other news medium without the prior written authorization of the City's Project Manager. Exhibit C details requirements

## 3. Compensation.

- A. Agreement Sum. As compensation for Contractor's timely performance of the Services in accordance with this Agreement, City shall pay Contractor a total sum not to exceed \$1,911,200 (the "Agreement Sum"), in accordance with the "Schedule of Rates" attached hereto as Exhibit B. Contractor will submit monthly invoices to City concerning the Services performed by Contractor during the immediately preceding month (each an "Invoice"). Each Invoice will contain the following information: (a) a summary of the Services performed by Contractor (and by whom); (b) the number of hours (or fraction thereof) each person spent to perform the Services; (c) the applicable fee(s) for performing the Services; and (d) all other information reasonably requested by City. City will pay the undisputed amount due under each Invoice within thirty (30) days after City has reviewed and approved the Invoice. No compensation will be paid by City for any portion of the Services not performed. Payment shall not be considered acceptance or approval of any Services or waiver of any defects therein. The Agreement Sum shall constitute full and complete payment for said Services and all expenditures which may be made and expenses incurred, except as otherwise expressly provided in this Agreement or agreed to by mutual written and duly signed agreement of City and Contractor. Notwithstanding the foregoing, the parties may not increase the Agreement Sum without prior written authorization of the City Manager. Failure of Contractor to secure authorization for extra work shall constitute a waiver of all right to adjustment in the Agreement Sum or Agreement time due to such unauthorized extra work and Contractor thereafter shall be entitled to no compensation whatsoever for the performance of such work.
- B. Contractor Identification. Contractor shall furnish to City Contractor's employer identification number, as designated by the Internal Revenue Service or, if the Internal Revenue Service has designated no employer identification number, Contractor's Social Security number.

## 4. Project Managers.

City's Project Manager is Adam Odell, PE. Contractor's Project Manager is Jason King, PE.

Page 2

Personal Services Agreement between  
Sandy, Oregon and Keller Associates



Each party shall give the other written notification of any change in their respective Project Manager.

**5. Duty to Inform.**

Contractor shall give prompt written notice to City's Project Manager if, at any time during the performance of this Agreement, Contractor becomes aware of actual or potential problems, faults or defects in the project, any nonconformity with the Agreement, or with any federal, state, or local law, rule or regulation, or has any objection to any decision or order made by City. Any delay or failure on the part of City to provide a written response to Contractor shall constitute neither agreement with nor acquiescence in Contractor's statement or claim and shall not constitute a waiver of any of City's rights.

**6. Contractor is Independent Contractor.**

Contractor is an independent contractor for all purposes and shall be entitled to no compensation other than the compensation expressly provided by this Agreement. Contractor hereby expressly acknowledges and agrees that as an independent contractor, Contractor is not entitled to indemnification by the City or the provision of a defense by the City under the terms of ORS 30.285. This acknowledgment by Contractor shall not affect his/her independent ability (or the ability of his/her insurer) to assert the monetary limitations found at ORS 30.270, the immunities listed at ORS 30.265, or other limitations affecting the assertion of any claim under the terms of the Oregon Tort Claims Act (ORS 30.260 to ORS30.300).

**7. Work; Intellectual Property; Records.**

- A. Work is Property of City. All documents, design documents, drawings, and specifications prepared by Contractor and furnished to the City as part of the Services, "deliverables," shall become the property of the City upon full payment for all Services, along with all underlying intellectual property rights, including but not limited to copyrights and patents of any type. Contractor shall retain its ownership rights in its design methods, drawing details, specifications, databases, computer software, processes, techniques, trade secrets, and other proprietary property used by Contractor to fully complete the Services (the "instruments of service"). The City agrees to obtain prior written agreement for any reuse or modifications of the instruments of service, and understands that any unauthorized use of the instruments of service shall be at the Owner's sole risk and without liability to the Consultant.
- B. Records. Contractor shall retain all books, documents, papers, and records that are directly pertinent to this Agreement for at least three (3) years after City makes final payment on this Agreement and all other pending matters are closed. Contractor shall allow City (or any of its authorized representatives) to audit, examine, copy, take excerpts from or transcribe any books, documents, papers, or records that are subject to the foregoing retention requirement.

**8. Errors.**

Contractor shall perform such additional work as may be necessary to correct errors in the work required under this without undue delays and without additional cost but only to the extent caused by Contractor's negligent acts, errors or omissions in the course of performing this Agreement.

**9. Extra or Changes in Work.**

Only the City Manager or Project Manager may authorize extra (and/or change) work. Failure of Contractor to secure authorization for extra work shall constitute a waiver of all right to adjustment in the Agreement Sum or project schedule due to such unauthorized extra work and Contractor thereafter shall be entitled to no compensation whatsoever for the performance of such work.

**10. Indemnity.**

Contractor acknowledges responsibility for any and all liability arising out of the negligent performance of this Agreement and shall hold City, its officers, employees, elected and appointed officials, volunteers, and agents harmless from and indemnify the City, its officers, employees and agents for any and all liability, settlements, loss, costs and expenses to the extent caused by (i) Contractor's negligent acts, errors or omissions in the course of performing this Agreement, including but not limited Contractor's negligent provision of professional services under this Agreement; (ii) Contractor's failure to pay any tax arising out of or resulting from performance of the Services; and/or (iii) an infringement of patent, trademark, and/or copyright for which Contractor is responsible. Contractor's indemnification obligations provided in this Section will survive the termination of this Agreement. If any aspect of this indemnity shall be found to be illegal or invalid for any reason whatsoever, such illegality or invalidity shall not affect the validity of the remainder of this indemnification.

**11. Insurance.**

A. Liability Insurance. Contractor shall maintain occurrence form commercial general liability and automobile liability insurance for the protection of Contractor, City, its Councilors, officers, agents and employees. Coverage shall include personal injury, bodily injury (including death) and broad form property damage, including loss of use of property, occurring in the course of or in any way related to Contractor's operations, in an amount not less than Two Million dollars (\$2,000,000.00) combined single limit per occurrence. Such insurance shall name City as an additional insured. Limits may be met with excess or umbrella policies.

B. Professional Liability. Contractor shall maintain a policy of Professional Liability Insurance in an amount not less than One Million dollars (\$1,000,000) per claim and Two Million dollars (\$2,000,000) aggregate.

C. Workers' Compensation Coverage. Contractor certifies that Contractor has qualified for State of Oregon Workers' Compensation coverage for all Contractor's employees who are subject to Oregon's Workers' Compensation statute, either as a carrier-insured employer as

provided by ORS 656.407, or as a self-insured employer. Contractor shall provide to City within ten (10) days after Agreement award a certificate of insurance evidencing coverage of all subject workers under Oregon's Workers' Compensation statutes insured by an insurance company satisfactory to City, if any. The certificate and policy shall indicate that the policy shall not be terminated by the insurance carrier without thirty (30) days' advance written notice to City. A copy of the certificate of self-insurance issued by the State shall be provided to City if the Contractor is self-insured.

- D. Certificates. Prior to commencing the Services, Contractor shall furnish to City certificates evidencing the date, amount, and type of insurance required by this Agreement. All policies will provide for not less than thirty (30) days' written notice to City before they may be canceled, except for non-payment.
- E. Primary Coverage. The coverage provided by insurance required under this Agreement shall be primary, and any other insurance carried by City shall be excess.

## 12. Breach of Agreement.

- A. Contractor shall remedy any breach of this Agreement within the shortest reasonable time after Contractor first has actual notice of the breach or City notifies Contractor of the breach, whichever is earlier. If Contractor fails to either remedy the breach or actively begin and maintain efforts satisfactory to the City to remedy the breach within ten (10) days of actual notice or the City's mailing, City may terminate that part of the Agreement affected thereby upon written notice to Contractor, may obtain substitute services in a reasonable manner, and recover from Contractor the amount by which the price for those substitute services exceeds the price for the same services under this Agreement.
- B. If the breach is material and Contractor fails to either remedy the breach or actively begin and maintain efforts satisfactory to the City to remedy the breach within five (5) days of the City's notice City may then treat Contractor as being in default and pursue any remedy available for such default at law or in equity.
- C. Pending a decision to terminate all or part of this Agreement, City unilaterally may order Contractor to suspend all or part of the Services under this Agreement. If City suspends terminates all or part of the Agreement pursuant to this Section, Contractor shall be entitled to compensation only for Services rendered prior to the date of termination or suspension, but not for any Services rendered after City ordered termination or suspension of those Services. If City suspends certain Services under this Agreement and later orders Contractor to resume those Services, Contractor shall be entitled to reasonable damages actually incurred, if any, as a result of the suspension.
- D. To recover amounts due under this Section, City may withhold from any amounts owed by City to Contractor, including but not limited to, amounts owed under this or any other Agreement between Contractor and City.



### **13. Mediation; Trial Without A Jury.**

If either party has a claim or dispute in connection with this Agreement, it shall first attempt to resolve the dispute through mediation. The parties shall mutually select an acceptable mediator, shall equally share the applicable mediation fees, and shall mutually select an applicable mediation venue. If either party fails to proceed in good faith with the mediation, or the parties otherwise fail to resolve the claim via the mediation process, the claiming party may proceed with litigation. Any litigation arising under or as a result of this Agreement shall be tried to the court without a jury. Each party agrees to be responsible for payment of its own professional fees, including attorneys' fees, in both mediation and litigation.

### **14. Termination for Convenience.**

The City may terminate all or part of this Agreement at any time for its own convenience by written notice to Contractor. Upon termination under this Section, Contractor shall be entitled to compensation for all Services rendered prior to actual notice of the termination or the receipt of the City's written notice of termination, whichever is earlier.

### **15. Payment of Claims by the City.**

If Contractor fails, neglects, or refuses to make prompt payment of any claim for labor or services furnished to Contractor or a subcontractor by any person in connection with this Agreement as the claim becomes due, the City may pay the claim to the person furnishing the labor or services and charge the amount of the payment against funds due or to become due to Contractor pursuant to this Agreement. The City's payment of a claim under this Section shall not relieve Contractor or Contractor's surety, if any, from responsibility for those claims.

### **16. Public Contracting Requirements.**

- A. Overtime. Any person employed on work under this Agreement, other than a person subject to being excluded from the payment of overtime pursuant to either ORS 653.010 to 653.261 or 29 USC §201 to 209, shall be paid at least time and a half for all overtime worked in excess of 40 hours in any one week.
- B. Payment for Labor or Material. Contractor shall make payment promptly, as due, to all persons supplying to Contract labor or material for the performance of the work provided for in this Agreement. (ORS 279B.220)
- C. Contributions to the Industrial Accident Fund. Contractor shall pay all contributions or amounts due the Industrial Accident Fund from Contractor incurred in the performance of this Agreement, and shall ensure that all subcontractors pay those amounts due from the subcontractors. (ORS 279B.220)
- D. Liens and Claims. Contractor shall not permit any lien or claim to be filed or prosecuted against the state or a county, school district, municipality, municipal corporation or subdivision thereof, on account of any labor or material furnished. (ORS 279B.220)

- E. Income Tax Withholding. Contractor shall pay to the Oregon Department of Revenue all sums withheld from employees pursuant to ORS 316.167. (ORS 279B.220)
- F. Hours of Labor. Contractor shall pay employees for overtime work performed under the terms of this Agreement in accordance with ORS 653.010 to ORS 653.261 and the Fair labor standards Act of 1938. (29 USC §§ 201 *et. seq.*)
- G. Workers' Compensation. Contractor is a subject employer that will comply with ORS 656.017. Contractor warrants that all persons engaged in contract work and subject to the Oregon Workers' Compensation law are covered by a workers' compensation plan or insurance policy that fully complies with Oregon law. Contractor shall indemnify City for any liability incurred by City as a result of Contractor's breach of the warranty under this Paragraph. (ORS 279B.230)
- H. Medical Care for Employees. Contractor shall promptly, as due, make payment of all sums to any person, co-partnership, association or corporation, furnishing medical, surgical and/or hospital care incident to the sickness or injury of Contractor's employee(s), all sums which Contractor agrees to pay for such services and all monies and sums which Contractor collected or deducted from the wages of employees pursuant to any law, contract or contract for the purpose of providing or paying for such service. (ORS 279B.230)
- I. Non-Discrimination. Contractor agrees to comply with all applicable requirements of federal and state civil rights and rehabilitation statues, rules, and regulations. Contractor also shall comply with the Americans with Disabilities Act of 1990, ORS 659A.142, and all regulations and administrative rules established pursuant to those laws.
- J. Lawn or Landscaping. If the Services or Project under this Agreement contemplate lawn or landscape maintenance, Contractor shall salvage, recycle, compost or mulch yard waste material at an approved site, if feasible and cost-effective. (ORS 278B.225)
- K. Foreign Contractor. If Contractor is not domiciled in or registered to do business in the state of Oregon, Contractor shall promptly provide to the Oregon Department of Revenue and the Secretary of State Corporation Division all information required by those agencies relative to this Agreement. Contractor shall demonstrate its legal capacity to perform these services in the state of Oregon prior to entering into this Agreement.
- L. Federal Environmental Laws. Contractor shall comply with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 U.S.C. 1857(h)), section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (40 CFR part 15).
- M. Tax Law Compliance. Contractor (to the best of Contractor knowledge, after due inquiry),

for a period of no fewer than six calendar years (or since the firm's inception if less than that) preceding the effective date of this Agreement, faithfully has complied with:

- 1) All tax laws of this state, including but not limited to ORS 305.620 and ORS chapters 316, 317, and 318;
  - 2) Any tax provisions imposed by a political subdivision of this state that applied to Contractor, to Contractor's property, operations, receipts, or income, or to Contractor's performance of or compensation for any work performed by Contractor;
  - 3) Any tax provisions imposed by a political subdivision of this state that applied to Contractor, or to goods, services, or property, whether tangible or intangible, provided by Contractor; and
  - 4) Any rules, regulations, charter provisions, or ordinances that implemented or enforced any of the foregoing tax laws or provisions.
- N. The City certifies that sufficient funds are available and authorized for expenditure to finance costs of this Agreement.

#### **17. Law of Oregon.**

The Agreement shall be governed by the laws of the State of Oregon. Venue shall be in Clackamas County, Oregon.

#### **18. Successors and Assignments.**

Both City and Contractor bind themselves and any partner, successor, executor, administrator, or assign to this Agreement. Neither City nor Contractor shall assign or transfer their interest or obligation hereunder in this Agreement without the written consent of the other party. Contractor must seek and obtain City's written consent before subcontracting any part of the work required of Contractor under this Agreement. Any assignment, transfer, or subcontract attempted in violation of this Section shall be void.

#### **19. Modification.**

Any modification of the provisions of this Agreement shall be reduced to writing and signed by authorized agents of City and Contractor.

#### **20. No Waiver of Legal Rights.**

A waiver by a party of any breach by the other shall not be deemed to be a waiver of any subsequent breach.

#### **21. Method and Place of Giving Notice, Submitting Bills and Making Payments.**

All notices, bills and payments shall be made in writing and may be given by personal delivery, mail, or by fax. Notice, bills, payments, and other information shall also be made via email to the parties listed in the address block below. Payments may be made by personal delivery,



mail, or electronic transfer. The following addresses shall be used to transmit notices, bills, payments, and other information:

**CITY OF SANDY**

**Jenny Coker**

Public Works Director

Email: [jcoker@ci.sandy.or.us](mailto:jcoker@ci.sandy.or.us)

CC: [portia.inman@stantec.com](mailto:portia.inman@stantec.com)

Phone: 503-668-6927

Fax: n/a

Address: 39250 Pioneer Boulevard  
Sandy, OR 97055

**KELLER ASSOCIATES, INC.**

**Larry Rupp**

President/CEO

Email: [lrupp@kellerassociates.com](mailto:lrupp@kellerassociates.com)

CC: [jking@kellerassociates.com](mailto:jking@kellerassociates.com)

Phone: 208-288-1992

Fax: 208-288-2999

Address: 100 East Bower Street, Suite  
110, Meridian, ID 83642

When notices are so mailed, they shall be deemed given upon deposit in the United States mail, postage prepaid, or when so faxed, shall be deemed given upon successful fax. In all other instances, notices, bills and payments shall be deemed given at the time of actual delivery. Changes may be made in the names and addresses of the person to whom notices, bills and payments are to be given by giving written notice pursuant to this Section.

**22. Conflict Between Terms.**

It is further expressly agreed by and between the parties hereto that should there be any conflict between the terms of this instrument in the proposal of the Agreement, this instrument shall control and nothing herein shall be considered as an acceptance of the said terms of said proposal conflicting herewith.

**23. Severability.**


If any provision or portion of this Agreement is held to be unenforceable or invalid by any court of competent jurisdiction, the validity of the remaining terms and provisions shall not be affected to the extent that it did not materially affect the intent of the parties when they entered into the Agreement.

**24. Integration; Counterparts; Electronic Signatures.**

This Agreement contains the entire agreement between the parties and supersedes all prior written or oral discussions or agreements regarding the same subject. The Agreement may be executed in any number of counterparts, each of which so executed shall be deemed to be an original and such counterparts shall together constitute but one and the same Agreement. Any party shall be entitled to sign and transmit electronic signatures to this Agreement (whether by facsimile, .pdf, or electronic mail transmission), and any such signature shall be binding on the party whose name is contained therein. Any party providing an electronic signature to this Agreement agrees to promptly execute and deliver to the other parties, upon request, an original signed Agreement.

*[Signatures are on the following page.]*

**IN WITNESS WHEREOF**, City has caused this Agreement to be executed by its duly authorized undersigned officer and Contractor has executed this Agreement on the date hereinabove first written.

<hr/> <p>City of Sandy Tyler Deems, City Manager</p>	 <p>Digitally signed by Larry S. Rupp Date: 2024.09.06 12:52:55-06'00'</p> <hr/> <p>Keller Associates, Inc. Larry Rupp, President/CEO</p>
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## Exhibit A

## City of Sandy

## Alder Creek Water Treatment Plant Upgrades SCOPE OF WORK

### PROJECT DESCRIPTION

**City of Sandy** (“Owner”) has contracted with **Keller Associates** (“Consultant”) to provide engineering, bidding, and construction services for upgrades to the Alder Creek Water Treatment Plant (WTP) and related facilities. The Owner has retained Stantec as the Owner’s Representative and Stantec will be supporting the Owner throughout the project.

As indicated in the Alder Creek Water Treatment Plant Conceptual Design Report, prepared by Stantec, the project is anticipated to replace the existing Trident filter units with two, Owner pre-purchased, Low Pressure Membrane Filtration (LPMF) units to achieve a firm treatment capacity of 3 MGD. Upgrades to the raw water pump station, membrane feed tank, chemical feed systems, finished water pump station, and new generator and automatic transfer switch are anticipated to support the new LPMF treatment units. The new WTP equipment will be installed outside on a concrete slab with a covered awning, a new enclosed building is not required.

The treated water from the WTP is conveyed to the Terra Fern Reservoir and Pump Station. Due to the increased capacity at the WTP, an evaluation of the existing pump station and distribution system is to be completed to understand the existing capacity and associated constraints. The first phase of the project will include a condition assessment, capacity analysis, and localized waterline modeling to identify the recommended distribution and pump station improvements. A management reserve budget (Task 7) has been included to support the design, bidding, and construction of the identified improvements at the Terra Fern site. Consultant will notify Owner if additional budget is required to complete the improvements.

Consultant’s services are limited to those services outlined in the following scope of work.

### SCOPE OF WORK

#### **TASK 1: PROJECT MANAGEMENT**

##### *Consultant Responsibilities:*

- 1.1. General Project Management. Provide general project administration services including contract administration, project accounting, invoicing, scheduling, bi-weekly project coordination meetings, monthly progress reports, and internal project administration.

Funding is provided via two sources: Special Public Works Fund and Safe Drinking Water Revolving Loan Fund. This project will invoice both funds. Work associated with the Alder Creek Water Treatment Plant treatment process will be invoiced to the Special Public Works Fund and work associated with Terra Fern, standby power, pumping, and conveyance will be invoiced to the Safe Drinking Water Revolving Loan fund. Based on the anticipated level of effort, it is assumed invoices will typically be split: 75 percent to the Special Public Works Fund and 25 percent to the Safe Drinking Water Revolving Loan Fund.\_

- 1.2. Kickoff Meeting. Participate in a project kickoff meeting. Prepare agenda and minutes. The purpose of this meeting will be to establish Owner’s design review team, review the overall project schedule including major milestones and meetings, review objectives of the design, discuss available data and published materials that will be made available by the Owner, and review process for deliverables including process for Owner review/approval and invoicing procedures.
- 1.3. Request for Information. Prepare initial request for information for data to be used in the design process.

##### *Owner Responsibilities:*

- Provide meeting space for project meetings.



*Assumptions:*

- Project management budget assumes a project schedule of up to 30 months for design, bidding, and construction.
- Project funding administration and associated reporting requirements are by Owner.
- Kickoff meeting will be in person and include a site visit to the WTP and Terra Fern Pump Station.
- Bi-weekly status meetings will be held virtually for the duration of the project. Each meeting will be 30 minutes in duration and include up to two staff.

*Deliverables:*

- Monthly invoices.
- Kickoff meeting agendas and minutes.
- Request for information.
- Bi-weekly coordination meeting agenda and minutes.

**TASK 2: BASIS OF DESIGN REPORT – TERRA FERN PUMP STATION AND DISTRIBUTION***Consultant Responsibilities:*

- 2.1. Site Visit and Field Testing. Consultant will complete a site tour with Owner's operation staff of the pump station to assess general conditions, and note known and observed problems and needs. Consultant will work with Owner to develop a procedure to complete a pump test on the existing booster pumps as the station does not have a flow meter and information on the existing pumps is not available. Consultant will perform pump tests with Owner's support to document existing capacity of the pump station.
- 2.2. Design Criteria. Document design criteria that will serve as basis for design. Consultant will review information provided by the Owner's Representative, field testing data, and the water master plan in developing recommended sizing, type, and number of pumps to meet the Owner's current and future needs.
- 2.3. Water Modeling. Update the existing water model with the increased capacity of the Terra Fern Pump Station. Exercise the computer model to check pressures, headlosses, pipe velocities to identify potential transmission bottlenecks and make recommendations for pressure reducing valves if needed.
- 2.4. Recommended Improvements. Develop concept design drawings showing recommended improvements to the booster station, onsite piping, and distribution system.
- 2.5. Cost Estimate. Provide an opinion of probable cost for the recommended improvements at the Terra Fern Pump Station and Distribution System.
- 2.6. Workshop Meeting. Virtual meeting with Owner to review concepts and alternatives and select preferred alternative for design.
- 2.7. Draft Basis of Design Report (BODR). Prepare draft BODR, following the Oregon Health Authority (OHA) guidelines, documenting the recommended improvements. In addition to the minimum regulatory requirements, BODR to include concept drawings showing conceptual mechanical layout with yard piping, distribution improvements, one-line diagram, and P&ID. Submit to Owner for review.
- 2.8. Final BODR. Incorporate Owner input and submit to OHA for review. Address agency comments into final BODR.

*Owner Responsibilities:*

- Conduct site tour with Consultant; provide access to facilities and records.
- Provide a functioning copy of the existing WaterCAD model of the distribution system. Provide additional demand data, record drawings, operational controls, and other data as requested.
- Review and comment on the Basis of Design Report.

*Assumptions:*

- Surveying, if required, will be completed by the Owner or provided as an additional service.
- Geotechnical field investigations are not anticipated to be required at the Terra Fern site. If improvements are identified that would require a geotechnical investigation, these can be provided as an additional service.
- Field testing of pump capacity is assumed to be completed by performing drawdown tests with the existing reservoir. If additional instrumentation (level sensors, clamp-on flow meters, pressure gauges, etc.) are required, they will be provided by the Owner.
- Recommended improvements are limited to upgrades to the existing pump station, onsite piping, and distribution system. Concept drawings of a new pump station or reservoir improvements can be provided as an additional service.
- Water modeling effort is limited from Alder Creek Finish Water pump station to the outlet of Sandercock Reservoir. Modeling is anticipated to include steady state modeling only.
- Troubleshooting the existing model is limited to one additional day in the field and up to 16 hours of additional modeling.
- Chlorine injection will not be needed at the Terra Fern Reservoir and Pump Station.
- Three phase power is readily available and located adjacent to the site. Existing transformers have sufficient capacity for upgrades at Terra Fern and the WTP.
- Land and easement acquisition, negotiations, and legal descriptions are not included.
- A Basis of Design Report is only needed for the Terra Fern Pump Station and distribution system. The Conceptual Design Report, prepared by Owner's Representation, can be used for documenting the basis of design for the Alder Creek Water Treatment Plant Upgrades. DEQ and OHA submission and approval is by the Owner. Therefore, an updated Basis of Design Report for Alder Creek Water Treatment Facility will not be prepared.
- Consultant can rely on the flow analysis and future flow projections provided by the Owner or as documented in the Water Master Plan.

*Deliverables:*

- Agenda and minutes for virtual online Meeting.
- Draft and Final BODR.

**TASK 3: FINAL DESIGN – ALDER CREEK WTP***Consultant Responsibilities:*

- 3.1. 30% Design Plans. Once Owner has provided the proposal documents for the pre-purchase of the LPMF system, Consultant will prepare and submit 30% design documents to the Owner including general, site, utility, mechanical, electrical, and P&ID. Coordinate location of treatment skids, chemical storage, pumps, piping layout, spacing, electrical equipment, generator, security, equipment access, and HVAC equipment, with the Owner. Develop electrical load list for new and existing equipment for use in evaluating capacity of existing transformer. If a new transformer is required, pre-purchase services can be provided as part of Task 7 – Management Reserve.
- 3.2. 60% Design Plans and Specifications. Consultant will prepare and submit 60% design documents to the Owner. Design drawings to include general, site civil, general structural and architectural, mechanical, electrical (one-line), and instrumentation and control (P&ID) sheets. In addition, address 30% design review comments in the 60% submittal.  
  
Prepare table of contents for technical specifications.  
  
Prepare list of long lead items for discussion with the Owner. If Owner elects to pre-purchase equipment/materials, pre-purchase services can be provided as part of Task 7 – Management Reserve.
- 3.3. 90% Design Plans and Specifications. Address 60% design review comments in the 90% submittal. Advance design to 90% and submit design review drawings and specifications to the Owner. Drawings to

include survey, site civil, structural, architectural, HVAC, mechanical, electrical, and instrumentation and control plan sheets.

Instrumentation and control plan sheets will generally include a network layout drawing, control panel layout drawings will be prepared following the City's SCADA Master Plan and standard equipment, piping and instrumentation diagrams (P&ID), wiring diagrams, input/output schedule, and the instrumentation schedule.

Technical specifications will be prepared to detail the materials, processes, and products that are to be used in the construction. Additionally, Consultant will assist to Owner in preparing Division 0 and Division 1 Specifications.

- 3.4. Review Workshop Meetings. Participate in 30%, 60%, and 90% design review workshop meetings.
- 3.5. Agency Submittal(s). Agency design checklists will be completed and submitted along with the 90% plans and specifications to Agency for review.
  - 3.5.1. Owner's Representative to lead land use permitting. Consultant will provide figures for Owner's use at 30% design.
  - 3.5.2. Submit to Building Department at 90%, address comments and resubmit at 100% (Trade permits will be obtained by Contractor).
  - 3.5.3. Submit to Oregon Health Authority at 90%, address comments and resubmit at 100%.
- 3.6. Final Documents. Upon Owner and Agency review, Consultant will incorporate appropriate revisions into a final set of stamped drawings and specifications that will be used for bidding. Respond to Agency comments and provide resubmittal to approving Agency(ies) if required.
- 3.7. Opinion of Probable Cost. Prepare an ACE Class 3/4 opinion of probable cost for the project at 60% and final design.

*Owner Responsibilities:*

- Review and provide one set of written consolidated comments on the 30%, 60%, and 90% design deliverables.
- Provide legal and risk reviews of the bid documents. Assist in identifying permits and approvals for which Contractor will be responsible.
- Provide written review comments from Owner's SCADA integrator.
- Owner to provide Front-End Construction Contract Documents and Division 1.
- Pay for any associated permitting fees not assigned to the Contractor.

*Assumptions:*

- Drafting will be completed on 22"x34" sheets.
- Approved pre-purchased submittals for the LPMF system will be available prior to starting 60% design.
- Owner is responsible for reviewing and approving the pre-purchased LPMF equipment submittal.
- Project funding requires construction materials to meet American Iron and Steel (AIS) requirements. BABA is not required as part of the project funding.
- Control design scope assumes that Owner's Representative will be performing the integration services.
- The project will be bid as a single project but will have two bid forms (one for conveyance and one for treatment) for separation of funding.
- Owner's Representative (Stantec) will provide front end documents that include standard bidding forms, contract forms, construction forms, and general conditions based on the 2018 edition of EJCDC and prepare draft Division 01 documents for Consultant review/comment.

- Terra Fern pump station and distribution design upgrades are not included in this task, but are anticipated to be included in the management reserve task (Task 7).
- Existing power service at Alder Creek has sufficient capacity.
- Project will not include irrigation or landscaping of the site. Services of a licensed landscape architect will not be required. Disturbed surfaces will be restored with grass seed, gravel, or similar to existing condition as appropriate.
- Owner is responsible for land use permitting.
- Meetings are virtual/online
- Extensive architectural features and architectural rendering are not included.
- Contractor will be required to prepare and implement a Storm Water Pollution Prevention Plan (SWPPP), prepare traffic control plans, and secure associated permits.
- Shoring and dewatering (if required) will be designed by the Contractor.
- Trade Permits will be obtained by the Contractor.
- Time for correspondence and meetings, due to an Owner or Contractor initiated change in the project design, preparing additional bidding-related documents (i.e. contract prequalification and alternative bids), participating in project peer reviews or value engineering, and/or project support above and beyond that described is considered an additional service.
- Equipment pre-purchase services, if required, will be provided as part of Task 7 – Management Reserve.
- Since Consultant has no control over the cost of labor, materials, equipment, or services furnished by others, or over the Contractor’s methods of determining prices, or over competitive bidding or market conditions, the Consultant does not guarantee that proposals, bids, or actual construction cost will not vary from opinions of probable construction cost prepared by the Consultant.
- AutoCAD is to be used to prepare drawings and AutoCAD Civil 3D or Revit may be used for the site and building design. Spreadsheets will be prepared in Microsoft Excel and text documents in Microsoft Word.
- Permitting services are limited to drawing and figure preparation for submitting the Land Use Application. All other permitting services, including preparation of the Land Use Application, are by Others.
- Public involvement is not included.
- Reviews will be completed in Bluebeam thus no hard copies of the deliverables will be provided.

*Deliverables:*

- Land use permitting figures for Owner’s use.
- 30% design drawings, including one PDF submittal (prepared in 22”x34”).
- 60% design drawings and specifications, including one PDF submittal (prepared in 22”x34” reviewed in 11”x17”).
- 90% design drawings and specifications, including one PDF submittal (prepared in 22”x34”).
- 100% stamped design package, including one PDF submittal (prepared in 22”x34” reviewed in 11”x17”).
- Opinion of probable cost.
- Building permit submittal.

**TASK 4: SERVICES DURING BIDDING**

*Consultant Responsibilities:*

- 4.1. Pre-Bid. By Owner’s Representative.
- 4.2. Addenda. If required, respond to bidder questions, and prepare up to three addenda during the bidding process to clarify, correct, or change the issued documents.
- 4.3. Bid Opening. By Owner’s Representative.



#### 4.4. Bid Evaluation. By Owner's Representative.

##### *Owner Responsibilities:*

- Prepare Advertisement and publish. Make arrangements and pay for the advertisement of the project.
- Distribute bidding documents including addenda to bidders.
- Attend and chair the pre-bid meeting.
- Attend and chair the bid opening meeting.
- Provide legal services if required.
- Award the bid.

##### *Assumptions:*

- One bid package and one bidding process is assumed. If rebidding or addressing bid protests is required, these services will be provided as an additional service.
- Consultant's efforts are limited to responding to questions and preparing addenda as requested by Owner.
- Terra Fern pump station and distribution design upgrades are not included in this task, but are anticipated to be included in the management reserve task (Task 7).

##### *Deliverables:*

- Prepare addenda for Owner's use.

### **TASK 5: CONSTRUCTION PHASE SERVICES**

##### *Consultant Responsibilities:*

This task includes the professional services to support the Owner and Owner's Representative during the construction of the project by one prime Contractor. Consultant's level of effort during construction is often affected by the selected Contractor. The fee estimate, level-of-effort projections, and schedule assumptions represent Consultant's professional judgement. As activities progress, it may become apparent some modifications to this scope are necessary due to changes in the Contractor's schedule and work. Consultant will advise the Owner's Representative of such issues and any fee and/or schedule impact prior to implementing revised activities. This task will include the following:

- 5.1. Construction Contract Administration. By Owner's Representative.
- 5.2. Contract Documents. Incorporate addenda and prepare construction documents for distribution to Owner and Contractor.
- 5.3. Pre-Construction Meeting. A pre-construction conference will be chaired by the Owner's Representation and attended by the Owner, Consultant, the Contractor, major suppliers, and subcontractors. The purpose of this meeting will be to establish lines of communication as well as procedures and timelines for the job. Owner's Representative will prepare meeting agenda and meeting notes to be distributed to attendees.
- 5.4. Construction Meetings. Attend monthly construction meetings (virtually) as requested by the Owner's Representative.
- 5.5. Contractor Schedule. By Owner's Representative.
- 5.6. Submittals. Review Contractor's submittals for general conformance to the specified materials and methods noted in the design plans and specifications. Reviews will not specify Contractor techniques, sequencing, procedures, means or methods of construction or to safety precautions.
- 5.7. Test Results. By Owner's Representative.
- 5.8. Requests for Information (RFIs). Respond to RFIs from Contractor or Owner's Representative and provide clarification of Contract Documents.
- 5.9. Pay Requests. By Owner's Representative.
- 5.10. Change Orders. Review change order and work directive requests.

- 5.11. Field Orders. Prepare and issue field orders requiring minor changes in the work.
- 5.12. Site Visits. As requested by Owner's Representative, Consultant will participate in up to ten (10) site visits during periods of active construction.
- 5.13. Substantial and Final Completion Inspections. Hold a Substantial Completion inspection with Owner Staff for the purpose of issuing a Notice of Substantial Completion to the Contractor. This Substantial Completion inspection will include the development of a "punch-list" for the Owner to use as the Contractor's final work to be completed. A final walkthrough will be held at the site to check that punch list items have been completed.

*Owner Responsibilities:*

- Review and process Contractor pay requests, change orders and other construction related documents.
- Provide Construction Contract Administration throughout the duration of construction.
- Provide day-to-day construction observation. Seek interpretation of the Contract Documents as required. Alert Consultant of any concerns observed.

*Assumptions:*

- One member of the Consultants team will attend the pre-construction meeting in person.
- Work will be performed by one General Contractor.
- If required, Material testing services such as soil compaction, concrete, asphalt, steel, pipe pressure, and bacteria will be provided by the Owner and reviewed by the Consultant. Owner shall also be responsible for specialty inspection services as outlined in the contract documents.
- Budget assumes 14 months of active construction.
- Substantive design and other technical services in connection with work change directives, change proposals, and change orders requested by Owner will be completed as an additional service. Similarly, use the of the additional services budget will apply to extended services arising from (a) the presence at the site of any constituent of concern or items of historical or cultural significance, (b) emergencies or acts of God endangering the work, (c) damage to the work by fire or other causes during construction, (d) a significant amount of defective, neglected, or delayed work, (e) acceleration of the progress schedule involving services beyond normal working hours, or (f) default by Contractor.
- Claims or legal support services, if required, will be provided as an additional service.
- Consultant shall not be responsible for any decision made regarding the Contract Documents, or any application, interpretation, clarification, or modification of the Construction Contract Documents, other than those made by Consultant.
- Budget also assumes 180 submittals reviews, 90 resubmittal reviews, 60 RFIs, 10 field orders, and 5 change orders. Consultant will notify the Owner that the Consultant is commencing an additional service when any of these levels have been reached.
- Terra Fern pump station and distribution design upgrades are not included in this task, but are anticipated to be included in the management reserve task (Task 7).

*Deliverables:*

- One full size (22" x 24") electronic copy in PDF format of the Contract documents and drawings and will be delivered to Owner.
- Submittal and RFI reviews.
- Substantial completion checklists.

**TASK 6: PROJECT CLOSEOUT***Consultant Responsibilities:*

- 6.1. O&M Manual. Consultant will receive from the Contractor an operation and maintenance manual (O&M) that includes all major equipment and an O&M from the LPMF supplier. Consultant to provide brief supplement outlining the purpose, design criteria, operations/controls (including normal operations, theory of operation, pump isolation), and a summary of recommended preventative maintenance activities. Consultant will submit a draft to the Owner. Upon receiving comments, Consultant will address comments and submit final O&M.
- 6.2. Record Drawings. The Record Drawings will be developed using the Contractor maintained set of "Red-line" drawings and will show locations of installed components of the Project as identified by the Contractor. These Record Drawings will show significant changes made during construction. Contractor drawings will be reviewed, noted and submitted to Owner. Record drawings will be provided to Owner as updated electronic CAD files and a PDF of Construction Drawings.

*Owner Responsibilities:*

- Provide information for O&M manual as requested by Consultant.
- Provide written comments on draft O&M manual provided.
- Provide written comments on red-lined drawings from Contractor.

*Assumptions:*

- The Contractor will prepare operation and maintenance manual information for the equipment and submit it to the Consultant.
- The operation and maintenance manual for the LPMF will be prepared by others.
- Because Record Drawings are based on unverified information provided by other parties, the Consultant does not warrant their accuracy.
- Project services are assumed to end at the final completion date for construction. Ongoing support services and 11-month warranty service, if requested by the Owner, will be provided separately as an additional service.
- Terra Fern pump station, reservoir and distribution design upgrades are not included in this task, but are anticipated to be included in the management reserve task (Task 7).

*Deliverables:*

- One electronic copy in PDF format of the Operations and Maintenance Manual provided to the Owner.
- One electronic (PDF) copy of construction plans marked "Record Drawings" and electronic CAD files, if requested.

**TASK 7: MANAGEMENT RESERVE (ADDITIONAL SERVICES)**

From time to time the Owner may have additional tasks related to the project, or additional tasks may be encountered that are not identified in this scope of work or that may be dependent on decisions not yet made ("Additional Services"). Such additional services may include equipment pre-purchase, design/bidding/construction of recommended Terra Fern Pump Station improvements, and Energy Trust incentives. This task establishes a management reserve for Additional Services. Consultant shall not perform any Additional Services unless authorized in writing by Owner staff (Owner's Project Manager). Compensation for Additional Services may be based on Consultant's time and material or a lump sum amount as agreed by Owner and Consultant.

**ADDITIONAL SERVICES (not included in scope of work)**

- Special use permits, public hearings, environmental information, or public meetings beyond those described in the scope of work
- Public outreach or stakeholder outreach support
- Power utility rebate support
- Field investigations, including subsurface investigations to check available record drawings
- Environmental investigations and permitting services
- Detailed quantity surveys of materials, equipment, and labor
- Funding administration
- Construction staking, pot holing/ profiling
- Project site tours
- Easements and right-of-way acquisition support
- Completion of the warranty walkthrough 11-months after the issuance of Substantial Completion to the Contractor

**SCHEDULE**

Consultant anticipates the following project schedule to allow the City to advertise for bidding in September of 2025. The number of days associated with each of the tasks are approximate and assume timely delivery of requested information. Actual schedule may vary:

Task	Schedule	Comments*
Task 2 – Terra Fern Pump Station Basis of Design Report (BODR)	60 days	A draft BODR Report will be submitted to Owner 60 days from completing site visit, field testing, and existing water model. The final BODR will be submitted within three weeks of receipt of review comments.
Task 3 – Alder Creek WTP 30% Design Complete	60 days	30% Design Plans will be completed within 60 days after kickoff meeting and receiving LPMF proposal documents .
Task 3 – Alder Creek WTP 60% Design Complete	60 days	60% Design Plans will be completed within 60 days after receiving Owner comments from the 30% review design meeting and approved LPMF submittal.
Task 3 – Alder Creek WTP 90% Design Complete, Permit Submission to Agency	75 days	90% Design Plans will be completed within 60 days after receiving Owner comments from the 60% review design meeting. A 90% permit set will also be provided to reviewing Agencies.
Task 3 – Alder Creek WTP 100% Design, Final Submission to Agency	45 days	100% Design Plans and Specifications will be completed and submitted to Agency within 45 days after receiving Owner comments from the 90% review design meeting.

\*Schedule assumes Owner and Owner’s Representative reviews are no greater than 10 working days after receipt of submittal from Consultant.



**COMPENSATION**

As compensation for services to be performed by Consultant, the Owner will pay Consultant as described in the following table. Funding is provided via two sources and tasks will be invoiced accordingly as described in Task 1 above. While individual task may exceed their amount, the total authorized budget amount shall not be exceeded without written authorization from the Owner. For time and materials tasks, compensation will be according to the Consultant's billing rates following the requirements of Exhibit C – City of Sandy Professional Services Commercial Terms, Hourly Labor Rates and Direct Charges.

Task	Type	Amount
Task 1 – Project Management	T&M	\$77,700
Task 2 – Basis of Design (Terra Fern Pump Station)	T&M	\$71,500
Task 3.1 – Final Design (30% plans and workshop)	T&M	\$160,800
Task 3.2 – Final Design (60% plans, cost estimate, and workshop)	T&M	\$267,200
Task 3.3 – Final Design (90% plans, specifications, and workshop)	T&M	\$462,600
<del>Task 3.2</del> – Final Design (100% plans, agency submittals, specifications, cost estimate, and workshop)	T&M	\$252,300
Task 4 – Services During Bidding	T&M	\$44,100
Task 5 – Construction Phase Services	T&M	\$391,400
Task 6 – Project Closeout	T&M	\$53,600
Task 7 – Management Reserve	T&M	\$130,000
<b>Total Cost</b>		<b>\$ 1,911,200</b>

T&M = Time and Materials

## EXHIBIT B – City of Sandy Professional Services Commercial Terms Hourly Labor Rates and Direct Charges

### A. LABOR RATES

- 1) City will pay Consultant on a time and materials basis.
- 2) Labor costs for all Consultant's staff will be billed using a 3.15 multiplier times the direct labor rate.
- 3) The maximum labor rate for any labor category will be capped at \$300 per hour.

### B. EXPENSES

Expense Type	Rate
General and Administrative Fee (G&A)	7.5%
Mileage	Current IRS Rate
Travel, Lodging, and Subsistence (a)	At Cost plus G&A
Subconsultant and Direct Purchase (b)	At Cost plus G&A
All Other Expenses Directly Attributable to the Project (c)	Included in direct labor multiplier and G&A Fee

(a) Charged only when round trip mileage exceeds 50 miles.

(b) Direct purchase for equipment, supplies, or materials requested by the City.

(c) Includes, hardware, software, health, safety and equipment, PPE, and employee expenses.

### C. BILLING FOR TRAVEL

Consultant may charge labor costs as described in Section A for travel from its offices to work sites and meetings during normal business hours. Consultant will not bill for a mobilization, trip charge, or minimum charge for meetings or site visits.

### D. Stand-by Time Policy

Consultant will not charge for stand-by-time.

### E. OVERHEAD, SUPPORT, AND ADMINISTRATIVE CHARGES

Consultant may charge administrative and clerical labor costs as described in Section A for direct project-related work including word processing, document preparation, printing and binding, project filing, billing preparation and processing or other project-related accounting functions, documentation per funding agency requirements and related work.

### F. RATE CAP ADJUSTMENT

The rate cap establishing in Section A maybe adjusted annually for the CPI-W US City Average Percent Change per year (previous 12-month) for each period of contract (Jan 1 to Dec 31).

[https://www.bls.gov/regions/west/news-release/consumerpriceindex\\_west.htm](https://www.bls.gov/regions/west/news-release/consumerpriceindex_west.htm)

**Exhibit C****Contract Clauses for contracts with  
Professional Services Contractors (i.e. Consultants)  
for projects funded by Safe Drinking Water financing****Contract Clause Language****1. SAM Registration**

All entities that enter into contracts with a Safe Drinking Water Revolving Loan Fund recipient (i.e. contractors) must have a SAM Registration. The links below can be provided to contractors if they have not already addressed this requirement.

**SAM Registration:** <https://www.sam.gov/SAM/>

NOTE: The SAM registration expires annually and must be kept active until the SDWRLF project is closed

**2. Source of Funds**

Work under this contract is funded by the federal Safe Drinking Water Revolving Loan Fund through Business Oregon and a partnership of Local and/or Private Funds.

**3. Whistleblower**

Contractor receiving SDWRLF funds shall under or through this contract to, post notice of the rights and remedies provided to whistleblowers under No Fear Act Pub. L. 107-174. 29 CFR § 1614.703 (d).

**4. Non Discrimination**

The contractor shall not discriminate on the basis of race, color, national origin or sex in the performance of this contract. The contractor shall carry out applicable requirements of 40 CFR part 33 in the award and administration of contracts awarded under EPA financial assistance agreements. Failure by the contractor to carry out these requirements is a material breach of this contract which may result in the termination of this contract or other legally available remedies.

**5. Termination for Cause and for Convenience & Breach of Contract**

Contractor shall address termination for cause and for convenience, including the manner by which it will be effected and the basis for settlement. In addition, contractor shall address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

**6. Intellectual Property**

Contractor hereby grants to the U.S. E.P.A. a royalty-free, nonexclusive, and irrevocable license to reproduce, publish or otherwise use, and to authorize others to use, for federal government purposes, any intellectual property developed under this contract. Contractor shall secure from third parties the

same license in the name of the U.S. E.P.A. regarding any intellectual property developed by third parties as subcontractors to perform this project, or developed under contract with the Contractor specifically to enable Contractor's obligations related to this project.

**7. Inspections; Information** (language to be included in all contracts and subcontracts:)

Contractor shall permit, and cause its subcontractors to allow City of Sandy, the State of Oregon, the federal government and any party designated by them to:

- (1) Inspect and make copies of any accounts, books and records, including, without limitation, its records regarding receipts, disbursement, contracts, and any other matters relating to the Project, and to its financial standing, and shall supply such reports and information as reasonably requested.
- (2) Interview any officer or employee of the Contractor, or its subcontractors, regarding the Project.

Contractor shall retain all records related to the Project for three years after final payments are made and any pending matters are closed.

**8. American Iron Steel**

The Contractor acknowledges to and for the benefit of the Alder Creek Water Treatment Plant ("Water System") and the State of Oregon (the "State") that subsequent construction activities funded under this agreement are being funded with monies made available by the Drinking Water State Revolving Fund that have statutory requirements commonly known as "American Iron and Steel;" that requires all of the iron and steel products used in the project to be produced in the United States ("American Iron and Steel Requirement"). The Contractor hereby represents and warrants to and for the benefit of the Water System and the State that (a) the Contractor has reviewed and understands the American Iron and Steel Requirement, and (b) all engineering design, plans and specifications, and cost estimates shall facilitate compliance with the American Iron and Steel Requirement. While the Contractor has no direct contractual privity with the State, as a lender to the Purchaser for the funding of its project, the Purchaser and the Contractor agree that the State is a third-party beneficiary and neither this paragraph (nor any other provision of this Agreement necessary to give this paragraph force or effect) shall be amended or waived without the prior written consent of the State.

**9. Build America Buy America Act (BABA)**

The Contractor acknowledges to and for the benefit of the City of Sandy ("Owner") and the State of Oregon (the "State") that it understands the goods and services under this Agreement are being funded with federal monies and have statutory requirements commonly known as "Build America, Buy America;" that requires all of the iron and steel, manufactured products, and construction materials used in the project to be produced in the United States ("Build America, Buy America Requirements") including iron and steel, manufactured products, and construction materials provided by the Contractor pursuant to this Agreement. The Contractor hereby represents and warrants to and for the benefit of the Owner and the State (a) the Contractor has reviewed and understands the Build America, Buy America Requirements, (b) all of the iron and steel, manufactured products, and construction materials used in the project will be and/or have been produced in the United States in a manner that complies with the Build America, Buy America Requirements, unless a waiver of the requirements is approved, and (c) the Contractor will provide any further verified information, certification or assurance of



compliance with this paragraph, or information necessary to support a waiver of the Build America, Buy America Requirements, as may be requested by the Owner or the State. Notwithstanding any other provision of this Agreement, any failure to comply with this paragraph by the Contractor shall permit the Owner or the State to recover as damages against the Contractor any loss, expense, or cost (including without limitation attorney's fees) incurred by the Owner or the State resulting from any such failure (including without limitation any impairment or loss of funding, whether in whole or in part, any damages owed to the State by the Owner). If the Contractor has no direct contractual privity with the State, as a lender or awardee to the Owner for the funding of its project, the Owner and the Contractor agree that the State is a third-party beneficiary and neither this paragraph (nor any other provision of this Agreement necessary to give this paragraph force or effect) shall be amended or waived without the prior written consent of the State.

**10. Prohibition on the Use of Federal Funds for Lobbying** (Certification Regarding Lobbying form follows, for any contracts in excess of \$100,000)

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(form follows)

**CERTIFICATION REGARDING LOBBYING**

(Awards to Contractors and Subcontractors in excess of \$100,000)


The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

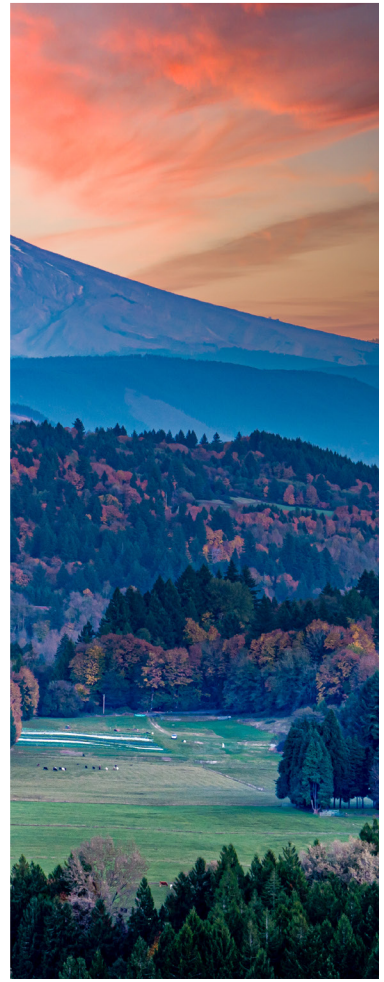
(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Signed	 <div style="display: inline-block; vertical-align: middle; border-left: 1px solid black; padding-left: 5px; margin-left: 10px;">       Digitally signed by Larry S.        Rupp        Date: 2024.09.06        12:56:12-06'00'     </div>
Title	President/CEO
Date	9/6/2024



# CITY OF SANDY



RFP SDWRP 03-24  
Engineering  
Services for the  
Alder Creek  
Water Treatment  
Plant Upgrades

May 2, 2024





May 2, 2024

City of Sandy  
Jennifer Coker, PE  
Public Works Director  
39250 Pioneer Boulevard  
Sandy, OR 97055

Re: **RFP SDWRP 03-24 Engineering Services for the Alder Creek Water Treatment Plant Upgrades**

Dear Ms. Coker and Selection Committee,

The City of Sandy (City) has established the Sandy Drinking Water Reinvestment Program (SDWRP) to provide a reliable water supply at an affordable price to its residents. The upgrades to the Alder Creek Water Treatment Plant (WTP) are critical to allow the City to fully utilize their own source water. The Keller Associates (Keller) team is committed to helping the City realize your goals and delivering a project that adheres to your budget and planned implementation timeline of January 2027.

Advantages of the Keller team:

- **Local Capability:** With offices in Beaverton and Salem, Oregon, we offer a local presence and team members who can regularly commute to the City. We can draw on the strengths and resources of over 190 team members located in 10 offices in Oregon, Idaho, Washington, Nevada, and Utah to deliver this project on time and on budget.
- **Demonstrated Experience with Critical Water Facilities:** Keller is known for our water resources and utility engineering practice—it is where we started. Our experience includes numerous projects involving pump stations, pipelines, and treatment plants across the Northwest. We also know the regulatory community in Oregon, including the Oregon Health Authority (OHA), and will use our experience to help the City be proactive in the permitting process to prevent unforeseen delays.
- **Capacity to Meet Schedule:** With the completion of Sandercock Reservoir, we bring proven experience delivering quality designs, that are on schedule, to the City. We advanced from concept to final design and remained engaged and flexible throughout construction. Our team understands the design constraints and will coordinate with the membrane supplier and the City’s Program Management staff (Program Team) to make this project a success.

**KELLER ASSOCIATES, INC.**

4800 SW Griffith Dr, Suite 128  
Beaverton, OR 97005  
Office: (971) 405-6331

**PRINCIPAL/AUTHORIZED REPRESENTATIVE**

Larry Rupp, PE  
President/CEO  
Office: (208) 288-1992

**SINGLE POINT OF CONTACT/ PROJECT MANAGER**

Jason King, PE  
Office: (208) 288-1992  
Cell: (208) 407-1052  
jking@kellerassociates.com



- **Project Familiarity that Leads to Efficiencies and Value:** Keller brings the same team members who delivered your Sandercock Reservoir rehabilitation project, led by Project Manager, Jason King. We know your design preferences, processes, safety measures, public focus, and your staff. Keller will deliver seamless integration and unique insights as we work through the Alder Creek WTP upgrades.

This proposal is valid for a period of 90 days. Keller is licensed to perform engineering services in the State of Oregon and is not disbarred, suspended, or otherwise prohibited from professional practice by any federal, state, or local agency. Larry Rupp will be involved in any negotiations and is legally authorized to sign any contract (Title: President/CEO; Phone: (208) 288-1992).

Our team understands your project goals and is committed to helping the City realize your vision of delivering the best water, service, and value. We look forward to working with you on this project.

Sincerely,

**KELLER ASSOCIATES, INC.**



Larry Rupp, PE  
President/CEO



Jason King, PE  
Project Manager/Design Lead

# 1. FIRM PROFILE

Keller is a regional, full-service, and multi-disciplinary civil engineering firm with 10 offices across the Northwest, **including local offices in Beaverton and Salem, Oregon**. We provide all facets of utility, civil, and water resources engineering and construction management services to support cities like Sandy. Keller has been licensed to do business in Oregon since 2007, and we have been providing services in the Portland Metro area for almost two decades. More importantly, we have experience bringing quality services to the City.

We started over 30 years ago delivering water and wastewater system planning and design. Since then, we have provided quality municipal engineering services to public agencies. Our experience includes numerous projects involving pump stations, pipelines, and treatment plants throughout the Northwest. Collectively, Keller's team members have over 100 years of experience in water infrastructure design and construction; we have seen it all. Our water treatment, pump station, and technical experts have designed facilities with similar complexity and challenges. Section 3 highlights examples of our successful project performance.

Our staff members have completed **over \$200M in water and wastewater infrastructure upgrades over the last five years**. These same technical experts are committed to your project and have worked together over the last five+ years. This allows us to efficiently work with the City to deliver the project within schedule and on budget. Additional team member experience can be found in Section 2.



## AVAILABLE FIRM RESOURCES

**IN-HOUSE EXPERTS:** With over 190 problem solvers across the Northwest—including **25 staff in Salem and Beaverton**—Keller offers a one-stop engineering firm staffed with in-house civil, mechanical, hydraulic, treatment, planning, transportation, electrical, structural, HVAC, and SCADA engineers. We provide multi-disciplinary approaches and solutions for your most common or challenging projects.

**ADMINISTRATIVE AND TECHNICAL SUPPORT:** Keller has sufficient support staff—including designers, technical editors, project assistants, and graphic designers—to provide top-notch deliverables. Our project assistants are integral to our project management approach, helping project managers with meeting summaries, budget and schedule management, and successful project delivery.

**COMPATIBLE COMPUTER EQUIPMENT AND SOFTWARE:** Keller knows that our greatest resource is our staff. We ensure they receive the most current equipment and relevant training to keep them at the top of their fields. This allows us to provide high-quality services efficiently. We will provide deliverables to match your standards. Keller uses the following tools in our projects:

- Windows-based PCs with MS Office
- Hydraulics and hydrology design software
- AutoCAD Civil 3D 2022
- ESRI formats and ArcGIS version 10 or better
- Bluebeam
- 3D visualization software, REVIT

Our in-house team members routinely assist clients with:

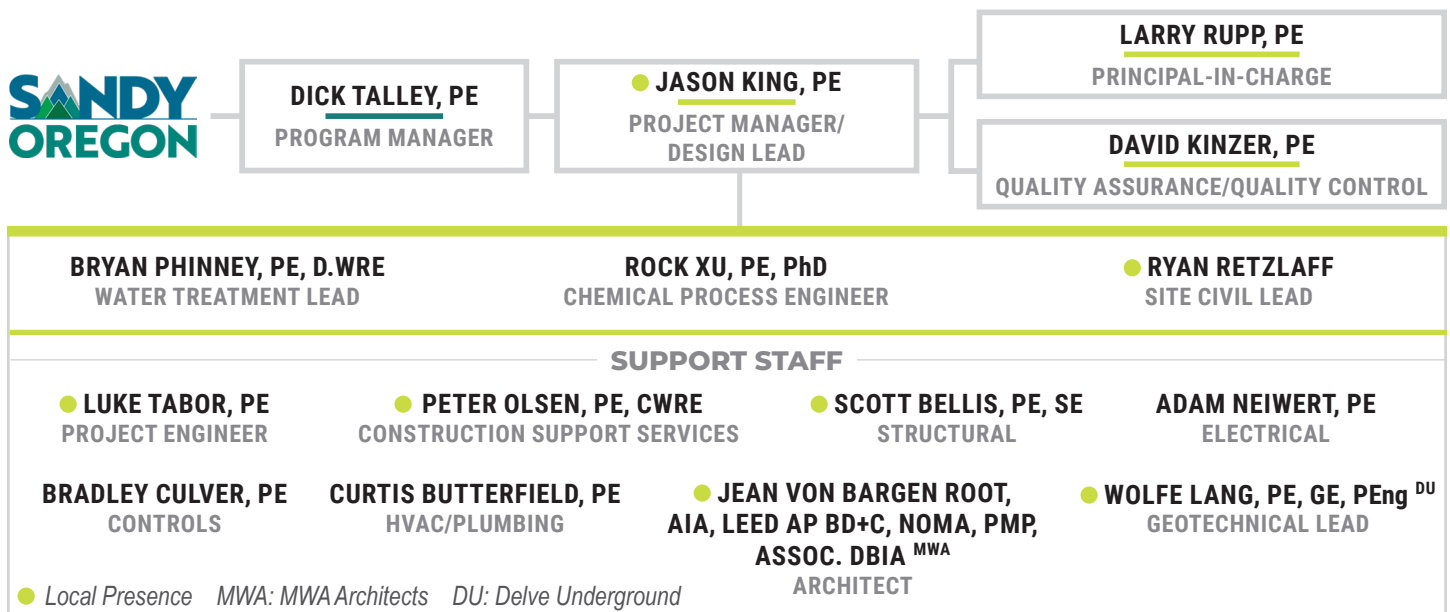
- WTP design, upgrades, and optimization
- Pump station design
- Water transmission main design
- Site access and security improvements
- Control system design
- Backup power generation equipment for treatment plants

## 2. PROJECT TEAM

Keller brings a large firm’s deep bench of technical experts with the nimble approach and low overhead of a smaller local firm. With offices in Beaverton and Salem, our staff members can be in Sandy in approximately one hour. The proposed Keller team has a record of delivering multi-disciplinary water resource projects according to schedule.

For this project, we are teaming with MWA Architects (MWA), a sustainable architecture firm, and Delve Underground, who will provide geotechnical services. MWA worked on the Bull Run Filtration Facility (BRFF) and brings local knowledge and key design strengths, such as energy efficiency and site design. Delve Underground completed the geotechnical investigation for this project. We will combine our strengths and function effectively as an integrated design team to meet the City’s objectives.

Our organization chart is below, followed by brief team member biographies. Resumes are in the Appendix.



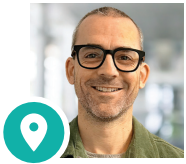
### JASON KING, PE | PROJECT MANAGER/DESIGN LEAD | OR 92481PE



Jason will be your Project Manager and Design Lead. Jason’s hands-on project management approach includes coordinating efforts with all team members. He will communicate project objectives, develop appropriate design criteria with City input, and track critical decisions to allow the project to progress efficiently. His approach focuses on quality and efficiency, resulting in high-quality projects and service at a great value.

In the last five years, Jason has managed the design and construction of over \$100M in water and wastewater treatment improvements. Project experience includes three recently completed water filtration projects for the City of Meridian, Idaho. These projects involved managing a fast-paced, multi-discipline team to design and construct 2,000 gallon per minute (gpm) pressure filtration systems in three of the City’s five pressure zones, significantly improving the City’s water quality. Jason oversaw the early procurement of the treatment equipment and coordinated with internal and external team members to finish the projects on time and under budget.

Jason brings a balance of management and technical experience and partners with his clients to deliver successful projects. He has worked with the City on previous projects, and will employ the same approach to deliver this project.



### **RYAN RETZLAFF** **SITE CIVIL LEAD**

Ryan will work closely with Jason and the project team as the Site Civil Lead to deliver design and construction

support services. Ryan has 26 years of experience leading complex projects throughout the Northwest. His diverse work experience ranges from permitting to construction of water distribution systems. Ryan is leading the construction management for the Tualatin Valley Water District (TVWD) Farmington Fluoridation and Booster Pump Facility, which is nearing completion and will become operational this year. He is also assisting the City of Vancouver with facility improvements on two pump stations: the Industrial Pump Station, which is nearing completion and anticipated to finish this year, and the SEH Lift Station awaiting bids following its completed design.



### **LARRY RUPP, PE** **PRINCIPAL-IN-CHARGE** OR 79040PE

As Principal-in-Charge and previous leader of Keller's water treatment

practice, Larry will work closely with Jason King, Bryan Phinney, Rock Xu, and others in the technical decision process. He will ensure the project has the necessary committed resources and provide input and direction on key issues. Larry has a record of delivering projects on time, under budget, and with minimal change orders. He excels as an advisor for complex design and construction projects. Larry combines a passion for treatment with a thorough understanding of water treatment fundamentals. He has experience with treatment projects ranging in budget from \$1M to \$40M and in size from 0.5 to 200 million gallons per day (MGD), including expansion of several facilities in Oregon and California. In addition to water treatment, Larry has designed and managed water storage and pumping projects with concrete and steel storage tanks and various pumping systems.



### **PETER OLSEN, PE, CWRE** **CONSTRUCTION SUPPORT SERVICES** | OR 83510PE

Peter brings extensive technical experience working with Oregon

communities on their water infrastructure projects and will provide construction support services for the City. Peter's technical understanding of capital improvement projects for municipal clients includes extensive water

treatment, pump station, and pipeline design involving hydraulics and computer modeling software. Peter's design experience is complemented by his planning and construction management experience, including construction engineering and inspection for capital projects on behalf of Oregon cities such as Wood Village, Ashland, Wilsonville, and Amity.



### **BRYAN PHINNEY, PE, D.WRE** **WATER TREATMENT LEAD** OR 73236PE

Bryan is a civil and environmental engineer with 26 years of engineering

experience, preceded by four years of treatment plant operations experience, giving him a unique perspective on municipal water infrastructure planning, design, and operation. He has worked on all aspects of municipal water systems, including water treatment (traditional processes; enhanced coagulation; membranes; disinfection with gas, liquid, solid chlorine, UV, and chlorine dioxide). Bryan has also worked on unique chemical feed systems to address water stabilization for lead and copper reduction; taste and odor (hydrogen sulfide, organics); and metals oxidation and sequestering (iron, manganese, arsenic). He has developed water supplies for several municipal and industrial clients, including springs, wells, and surface water intake structures.



### **ROCK XU, PE, PhD** **CHEMICAL PROCESS ENGINEER** OR 103990PE

Rock is a process and chemical engineer with experience planning,

designing, and testing municipal water treatment processes for clients. His expertise includes treatment feasibility evaluation, process modeling, and innovative system design and testing. He was a Quality Control Manager for bench and pilot process design and testing, including coagulation/flocculation (dissolved air), flotation (microsands), filtration (granular media filtration), reverse osmosis (biofiltration), ion exchange, disinfection systems (chemical oxidation), UV advanced oxidation process and ozone, and distribution system corrosion studies. He has insight into disinfection by-products (trihalomethanes, HAA-5 and HAA-9) formation chemistry, modeling, and prevention. Rock will provide water chemistry and treatment direction for your project.





**LUKE TABOR, PE**  
**PROJECT ENGINEER**  
 OR 100223PE

Luke's experience as a Project Engineer includes various municipal projects in water, wastewater, and stormwater utilities. He has completed facility evaluations and assisted with master planning, hydraulic modeling, and design projects. Luke is currently wrapping up a Water System Improvement project for the City of Willamina, which includes booster station improvements, a new surface water intake with new straining equipment, approximately 3,400 feet of raw water transmission line, and 3,500 feet of distribution main line. He recently completed a raw water line installation project for the City of Silverton, which included a complicated fish screen mechanical design and approximately 1,500 feet of pipeline replacement. Luke is currently working on a 1.2 million-gallon prestressed concrete tank, a four-pump booster station, approximately 2,000 feet of distribution main, and the new Well No. 6 for the City of Aurora.



**ADAM NEIWERT, PE**  
**ELECTRICAL | OR 87153PE**

Adam serves as a Lead Electrical Engineer at Keller. He has extensive experience working on new and existing electrical systems for municipal water systems. He is the Electrical Engineer of Record on several projects, including the TVWD Grabhorn Reservoir, Valve House, and Pipelines project. Adam is involved in all project stages, including scoping, budgeting, preliminary design, site evaluation, final design, and construction. His municipal engineering design expertise includes electrical service evaluation, standby power generation, pump station controls, motor control center design, variable frequency drives (VFD), harmonic filtering, developing controls strategies, future fiber infrastructure, cost estimation, and on-site troubleshooting. Adam has served as the Lead Electrical Engineer on recent water projects, including in-ground and above-grade water storage tanks and new and existing pump stations and well house components.



**BRADLEY CULVER, PE**  
**CONTROLS | OR 97265PE**

Bradley brings varied industry electrical and controls experience to the team, from conceptual design and detailed

engineering to construction, commissioning, start-up, and on-site troubleshooting. His experience has included power system distribution, medium and low voltage equipment specifications and configuration, overcurrent protective device coordination, arc-flash calculations, control system design, instrument specifications, and process control programmable logic controller programming. Bradley is responsible for the execution of work and the quality of deliverables from the electrical and controls team. He has extensive knowledge of industry best practices and various electrical design code requirements, including the National Fire Protection Association, UL Standards, Institute of Electrical and Electronics Engineers standards, and the International Energy Conservation Code.



**CURTIS BUTTERFIELD, PE**  
**HVAC/PLUMBING | OR 101193PE**

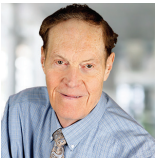
Curtis brings 7 years of engineering experience and 15 years of contracting experience to the project team.

His contracting experience includes mechanical diagnostics, design, and installation of a variety of mechanical systems. He provided mechanical services to the U.S. Military as a defense contractor and owned and operated a mechanical plumbing business for many years. Curtis provides planning, design, and construction support for HVAC and plumbing systems. His experience in these areas is augmented by his work with heat load evaluations, hydraulic analysis, piping, and mechanical design. Relevant work includes HVAC and plumbing systems designs for pump stations, electrical rooms, process facilities, warehouses, workshops, office space, laboratory, aeration systems, and more.



**SCOTT BELLIS, PE, SE**  
**STRUCTURAL | OR 93333PE, SE**

Scott is a licensed Structural Engineer in the State of Oregon with 11 years of structural engineering experience, including more than four years of experience in water and wastewater treatment and drinking water infrastructure. His experience includes the design of several water and wastewater treatment facilities including new plant buildings and hydraulic structures, retrofits to existing plant buildings and hydraulic structures, and equipment replacement and rehabilitation projects across the western U.S., including both high and medium seismic regions.



### DAVID KINZER, PE | QUALITY ASSURANCE/QUALITY CONTROL | OR 83080PE

David has more than 40 years of experience on all types of water engineering projects, with extensive experience providing quality assurance/quality control (QA/QC) oversight. In 2018, he was recognized as the American Society of Civil Engineers Southern Idaho Engineer of the Year.

## SUBCONSULTANTS

### MWA ARCHITECTS

Founded in 1988, MWA is a West Coast-based firm dedicated to creating sustainable architecture. Their projects reflect site context and serve as a foundation for community growth. MWA has successfully written, performed, and reported on Community Renewable Energy Grant Program renewable and resilience planning and construction grants through the Oregon Department of Energy. MWA is also supporting the City's transit client with these funding opportunities as they consider campus expansion. MWA conducts internal energy studies to support their client's efforts to provide higher resilience in service to their ratepayers. The studies cover predicted energy consumption and operational carbon emissions, both of which are needed to achieve a resilient WTP for the City.

### REFERENCES

#### City of Pendleton

Bob Patterson, Public Works Director  
bob.patterson@ci.pendleton.or.us  
(541) 966-0241

#### Portland Water Bureau

David Peters, PE, Engineering Manager, Special Projects  
david.peters@portlandoregon.gov  
(503) 823-2003



### JEAN VON BARGEN ROOT, AIA, LEED AP BD+C, NOMA, PMP, ASSOC. DBIA ARCHITECT

Jean has been practicing architecture in the Northwest for over 20 years. As Principal and Director of Sustainability, she leads MWA's efforts in resilient design with a focus on materials, energy, water, and social justice. She has successfully designed and managed four LEED certified projects including wastewater facilities and mixed-use housing. Jean actively advocates for the owner while collaborating with stakeholders, the project team, and the contractor.

### DELVE UNDERGROUND

Delve Underground is a leader in heavy civil engineering and specializes in underground design. Their technical expertise includes tunnel design, shaft design, excavation support, deep foundations, dewatering, slope stabilization, foundation design, and geotechnical characterization. Delve Underground completed the Alder Creek WTP Improvement Preliminary Study. They also have extensive project experience within the City and surrounding area, including the BRFF, Bull Run Filtration Program Raw Water Pipeline, City of Sandy Wastewater Treatment Plant Improvements, and the BRFF-Sandy Transmission Main and Pump Station.

### REFERENCES

#### Stantec

Aaron Eder, PE, Principal  
aaron.eder@stantec.com  
(503) 220-5415

Adam Odell, PE, Lead Civil Engineer  
adam.odell@stantec.com  
(503) 220-5409



### WOLFE LANG, PE, GE, PENG | GEOTECHNICAL LEAD | OR 78866

Wolfe has 30 years of geotechnical engineering experience with a focus on water, wastewater, and conveyance projects. He has a strong background in analyzing and designing various foundations, deep excavations, and tunnels. Wolfe has expertise in seismic ground motion characterization analysis, liquefaction analyses, and seismic soil-structure and soil-pipe design.

Project experience includes new treatment facilities and reservoirs, seismic rehabilitation of existing facilities, deep pump stations, pipelines, and trenchless crossings. Wolfe has provided senior geotechnical review for field exploration, subsurface condition interpretation, seismic hazards evaluation, dewatering, and pipe/trench construction considerations.

## 3. RELATED EXPERIENCE AND REFERENCES

### EXPERIENCE WITH CRITICAL WATER FACILITIES

Our team has significant experience with pipelines, valve vaults/structures, well buildings, pump stations, and treatment plants across the Northwest.

The project examples on the following pages were completed by members of the proposed project team in the last 10 years and highlight our successful past performance. Many of our projects have included HVAC systems, mechanical piping, electrical and controls, backup power generation, and chemical feed/injection. Our staff understands how to design and construct these elements, how they work, and how they fit into an overall water system. We have the experience to tackle the challenges your project may face, such as pump station rebuild, system reconfiguration, pipe hydraulics, and facility system integration. This depth and breadth of experience equates to real value for the City.

Our team works with owners and operators to identify and solve challenges during design and construction. During construction, we work proactively with clients to identify innovative ways to isolate systems while tie-ins are performed. Our staff is highly skilled and experienced working in “live systems” and conscious of the risks and hazards of this type of work. We are committed to providing construction crews with the right skillset for a particular work item. We are known for developing detailed activity-specific work/sequencing plans before implementation.



**RESILIENT WATER TREATMENT DESIGN.** From siting and security to construction sequencing and phasing, identifying innovative solutions is where we excel. We demonstrated this with the City of Meridian’s Water Filtration Facility, where we integrated concepts essential to the design while optimizing the facility’s operation, maintenance, and energy efficiency to meet existing and future demands. Jason served as the Project Manager and Design Lead on this project. He led the prepurchase of the treatment equipment and successfully coordinated with our multi-disciplinary team to efficiently complete the design.



#### WTP IMPROVEMENTS | CITY OF AMITY, OR

**REFERENCE:** Nathan Frarck, City Administrator | (503) 835-3711  
nfrarck@ci.amity.or.us

**CHALLENGES:** The project challenges included a failing infiltration gallery system, treatment reliability, and performance deficiencies during high-turbidity events.

**SOLUTIONS:** Our team worked closely with operations staff to design facility improvements, including a new finish water reservoir and pump station, emergency filter improvements, new preliminary treatment, filter media replacement, a new generator, and upgrades to the backwash pond, as well as storage reservoir site circulation improvements.

**SCOPE:** The City sought to complete water intake, treatment plant, and storage reservoir improvements identified as Priority One improvements in the Water Master Plan. Elements include the addition of standby power at the treatment plant, a redundant backwash pond, new clearwell and associated pumps, and other miscellaneous treatment plant improvements. Keller provided permitting, environmental approval support, and design for the project. We are currently providing construction phase support services. The project is nearing the end of construction and startup.





**TEAM MEMBER INVOLVEMENT:** Peter Olsen (Project Manager), Jason King (Technical Advisor), Bryan Phinney (Water Treatment Lead), Adam Neiwert (Electrical Lead), Scott Bellis (Structural Support), David Kinzer (QA/QC), Bradley Culver (Controls Lead), Larry Rupp (Principal), Curtis Butterfield (HVAC/Plumbing Lead)

**INTERESTING FACT:** *The electrical and controls gear and generator for the new intake are located on an 8-foot-tall concrete platform to protect the equipment from potential flood waters on this project site that regularly experiences flooding.*



## FARMINGTON FLUORIDATION AND BOOSTER PUMP FACILITY | TVWD, BEAVERTON, OR

**REFERENCE:** Nicholas Augustus, PE, Engineering Manager (971) 327-6292 | [nick.augustus@tvwd.org](mailto:nick.augustus@tvwd.org)

**CHALLENGES:** This project presented challenging operating scenarios, including complex site topography and footprint constraints. Access to both levels of the pump station and fluoridation facility was needed for mechanical equipment, which presented an additional design challenge.

**SOLUTIONS:** We worked within the existing footprint and designed a lower-level walk out on one side of the building with a ground level match for the second floor on the opposite side, resulting in ease of use and accessibility for City staff.

**SCOPE:** Keller designed a combined booster station and fluoridation facility with the associated risk of designing for challenging operating scenarios. Transmission main routing was finalized as part of the initial

planning efforts and included 10,500 feet of 18-inch ductile iron pipe. The designed pump station has a 7.5 MGD peak, 4 MGD firm, 17 MGD fluoridation treatment and hydraulic flow-through capacity. The design included fluoridation delivery and sizing, pump selection, site evaluation/grading, pipeline route evaluation and selection, mechanical and structural building information modeling, initial electrical evaluation, and coordination with permitting agencies. After 100% design completion, the project was downsized to a smaller building with a pressure reducing valve (PRV) within a fluoridation facility. This alternative delivery project is currently nearing completion. The final design incorporates fluoridation infrastructure with space on the site for a future pump station and additional stormwater infrastructure.

**TEAM MEMBER INVOLVEMENT:** Peter Olsen (Project Manager), Larry Rupp (Principal/Technical Advisor), Jason King (Mechanical QA/QC), Bryan Phinney (Water Treatment Lead), Adam Neiwert (Electrical), Bradley Culver (Controls), Ryan Retzlaff (Construction Support Services)

**INTERESTING FACT:** *The Keller team delivered 100% plans and obtained land use approval within 12 months. Value engineering provided in a short time frame kept the project moving forward.*

We know the regulatory community in Oregon, from the OHA, Oregon Department of Environmental Quality, and Oregon Water Resources Department to the Oregon Department of State Lands, National Marine Fisheries Service, and the U.S. Army Corps of Engineers. Our contacts and knowledge mean that we can help navigate the common pitfalls of regulatory red tape. The Farmington project recently received approval from OHA in April 2024.





## WATER FILTRATION TREATMENT UPGRADES CITY OF MERIDIAN, ID

**REFERENCE:** Kyle Radek, Assistant City Engineer | (208) 898-5500  
kradek@meridiancity.org

**CHALLENGES:** Testing indicated that water quality concerns at Well 27 originated from elevated levels of manganese, ammonia, and hydrogen sulfide, while Wells 18 and 10B also suffered from high concentrations of iron, manganese, and ammonia.

**SOLUTIONS:** After conducting a pilot study using three types of filter media, Keller recommended oxidation and pressure filtration with pyrolusite (green sand). Sodium hypochlorite at 12.5% concentration was used to oxidize the manganese and other undesirable compounds. In addition to the water treatment process, we designed a new concrete masonry unit well house and treatment building including pre-purchased filter equipment and a 2,400 gpm vertical turbine well pump.

**SCOPE:** To address aesthetic water quality concerns at Wells 27, 18, and 10B, the City commissioned Keller to oversee a pilot study of various treatment options and complete predesign of the selected solution. The project included coordination with treatment suppliers, preliminary sizing of a treatment system and associated components, standby power, review of existing assets and supporting utilities, and an evaluation of available land and setback requirements. The project also included equipment pre-selection and purchase, final design, bidding, and construction support.

**TEAM MEMBER INVOLVEMENT:** Jason King (Project Manager), Bryan Phinney (Water Treatment Lead), Adam Neiwert (Electrical Lead), Rock Xu (Chemical Process Engineer), Scott Bellis (Structural Lead), David Kinzer (QA/QC), Bradley Culver (Controls Lead), Curtis Butterfield (HVAC/Plumbing Lead), Larry Rupp (Principal)

**INTERESTING FACT:** *As part of the pilot study, we involved several community members in a “blind” taste test of the treated water to further support the selection of equipment and filter media.*

## TERRACE STREET RAW WATER PUMP STATION | CITY OF ASHLAND, OR

**REFERENCE:** Kevin Caldwell, Senior Engineer | (541) 552-2414 | kevin.caldwell@ashland.or.us

**CHALLENGES:** The project challenges included site constraints and land use permitting associated with building a new raw water pump station in the right-of-way of a residential neighborhood to convey raw water to the WTP.

**SOLUTIONS:** We proactively coordinated with agencies to understand local permitting constraints (noise, lighting, building aesthetics, etc.) and developed a concept layout that provided adequate access in a 16-by-16-foot footprint along with a rendering at 30% design.

**SCOPE:** The Keller team designed the Terrace Street Raw Water Pump Station to provide a major upgrade to the City’s backup raw water supply for the surface WTP. The three high-efficiency vertical turbine pump system can deliver 3.5 MGD, with the largest pump out of service. Project features include construction within a tight footprint, intake screening, VFDs, structural upgrades, conversion of dry pit to wet well with a separate settling chamber, and electrical/controls improvements to allow for continued gravity flow delivery to a portion of the City. The design also incorporated provisions for standby power and chemical feed (for pretreatment using sodium permanganate to oxidize iron and manganese and reduce overall chlorine demand).

**TEAM MEMBER INVOLVEMENT:** Jason King (Project Manager/Design Lead), Bryan Phinney (Water Treatment Lead), Adam Neiwert (Electrical), Peter Olsen (Field Support)

**INTERESTING FACT:** *Construction for this complex project was completed on schedule, with less than 1% change orders. The project won the Pacific Northwest Section of the American Water Works Association 2020 Excellence in Engineering Award for Best Small Engineering Works Project.*



**DISC DRIVE BOOSTER STATION**  
TRUCKEE MEADOWS WATER AUTHORITY (TMWA), RENO, NV

**REFERENCE:** Jason Barnes, PE, Senior Design Engineer  
(775) 834-8080 | jlbarnes@tmwa.com

**CHALLENGES:** The project challenges included corrosive soils, a busy utility corridor, site constraints, conditional use permitting, and maintaining system operation during construction.

**SOLUTIONS:** Tackling the challenges started with proactive coordination with our geotechnical partner, local utilities, and permitting agencies. We used soil testing to develop corrosion protection recommendations, integrated survey and mapping to identify the preferred alignment, submitted site and building renderings to help expedite agency approvals, and developed a phasing plan to ensure water supply was not interrupted throughout construction.

**SCOPE:** TMWA contracted with Keller to design a new booster station to address low-pressure issues in the northern portions of the Sparks Gravity System. The project includes a new booster station building with a capacity of over 16,000 gpm, 1,300 feet of 24-inch diameter piping, 750 feet of 30-inch diameter piping, 200 feet of 20-inch diameter piping, 620 feet of 14-inch diameter piping, and three-valve vaults. Keller provided civil, mechanical, electrical, controls, and structural design.

The piping portion of the project within Sparks and Vista Boulevards required traffic control considerations and coordination with multiple stakeholders, including NV Energy, Washoe County District Health, and the City of Sparks. The installation within this corridor was completed as marathon (24/7) work to minimize the impact on critical arterials. Keller coordinated with the City of Sparks throughout design to incorporate the proper work constraints in the bid documents. The project was completed on schedule with less than 1% change orders.

**TEAM MEMBER INVOLVEMENT:** Jason King (Design Manager), Larry Rupp (Principal), Curtis Butterfield (Plumbing/HVAC), Brandon Keller (Structural), Adam Neiwert (Electrical)

**INTERESTING FACT:** TMWA's water demands exceed 1 billion gallons a week in the summer. Since completing this project in 2020, TMWA has hired Keller to design four additional booster and well facilities.

TREATMENT, PUMP STATION, AND PIPELINE EXPERIENCE <i>(not all inclusive)</i>	Planning / Modeling	Treatment / Permitting	Distribution / Pump Stations	Storage Tanks	Intakes / Wells	Buildings	Tanks	Concrete Vaults	Retaining Walls / Beautification	Controls / Integration	Lighting / Assessments	Electrical for Facilities
	WATER ENGINEERING					STRUCTURAL ENG.				ELECTRICAL ENG.		
CLIENT	WATER ENGINEERING					STRUCTURAL ENG.				ELECTRICAL ENG.		
Amity, OR	●	●	●	●	●	●	●	●		●	●	●
Ashland, OR		●		●		●	●	●	●	●	●	●
Aumsville, OR	●		●	●	●	●	●			●		●
Gates, OR	●	●	●	●	●	●	●		●	●	●	●
Ontario, OR	●	●	●	●	●	●	●	●		●	●	●
Silverton, OR	●	●	●	●	●	●	●		●	●		●
Stayton, OR	●	●	●		●	●			●	●	●	●
TVWD, OR		●	●	●		●	●		●	●	●	●
Wilsonville, OR	●	●	●	●	●	●	●			●	●	●
Willamina, OR	●	●	●	●	●		●		●	●		●
Wood Village, OR	●	●	●	●	●	●	●			●	●	●
Meridian, ID	●	●	●		●	●		●		●	●	●

## 4. PROJECT APPROACH

### PROJECT UNDERSTANDING

As the City executes the SDWRP, the Alder Creek WTP improvements are a key priority. The Alder Creek WTP will provide the City with 1.8 MGD of potable water and be the primary water source for the City, with the BRFF providing supplemental supply when needed.

Improvements at the Alder Creek WTP include designing infrastructure to support the containerized membrane treatment systems which will be purchased by the City. Improvements also include rehabilitation of the raw water supply pump station, yard piping, finished water pump station, and associated infrastructure. The treatment facility will be covered with an open-air canopy with some provisions for security. Design considerations will include potential improvements to address periods of high turbidity in the raw water supply.

**Our team is committed to meeting the City's goal of having the new WTP online by January 2027.**

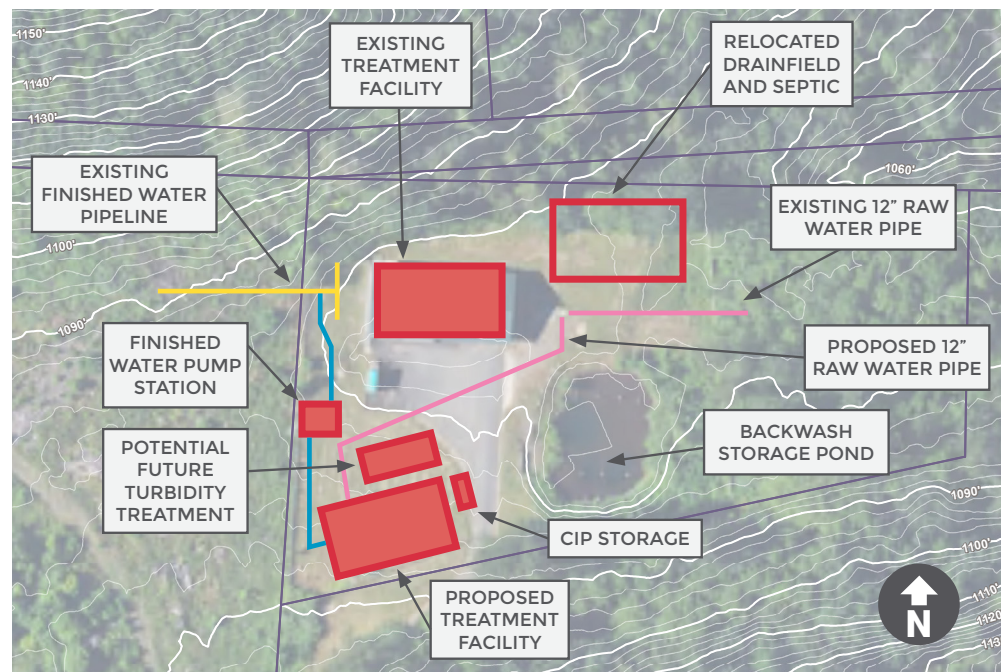
The existing raw water pipeline and finished water pipeline are considered to be in good condition. No improvements are needed. The existing treatment facility must be operational throughout construction.

### PROJECT APPROACH

The Keller project team will leverage the work already completed and compiled by the Program Team in the Conceptual Design Report to deliver the water treatment design in an efficient and timely manner. Coordination and collaboration with the City, Program Team, and membrane supplier are essential for project success. Challenges include coordinating with the membrane supplier, the security of the new equipment, optimizing the equipment layout within the existing lot, and providing design and rehabilitation of the existing raw water pump station while keeping the current WTP online. With Keller's in-house disciplines, we are positioned to efficiently coordinate between all team members from pre-purchase to project completion.

Providing some level of security when an enclosed facility is not desired creates some challenges. We will work with our teaming partner, MWA, to develop concepts that provide security without enclosure and are sensitive to cost.

Site layout may be challenging due to the existing grade of the site, limited square footage, and maintaining the existing structure for future use. The eastern half of the site is forested and may be challenging to permit new infrastructure. Improvements have been proposed in the western half of the site. The proposed layout is included in the Conceptual Design Report and summarized in the figure to the right. The location of turbidity treatment equipment has been included if the City determines this is needed in the future.





The existing raw water pump station requires rehabilitation to create a more reliable and accessible pump station. As outlined in the Conceptual Design Report, excessive moisture and a leaky structure must be fully repaired, which is likely to include a new lid to improve maintenance access. Other equipment requiring replacement or rehabilitation includes the two 25 horsepower pumps, VFDs, electrical equipment, a sump pump, increased venting, and vent fans. The pump station will need to stay in operation during rehabilitation or some bypass pumping will be required.

Our team will approach additional challenges that may arise—following a site visit, discussions with the operator, or once design has been initiated—by considering the proposed solutions’ effect on timelines, budgets, feasibility, and the City’s goals.

## DESIGNING YOUR PROJECT

Design will begin by holding a kickoff meeting with City staff, the Program Team, and Keller team members. At this meeting we will review team responsibilities, project constraints, and our approach to successfully meeting your goals. The design process will typically move through the following phases:

**RESEARCH AND DATA COLLECTION:** We will collect pertinent project data such as model data, as-built documents, survey and preliminary design reports, and other available data to guide the development of a preliminary engineering report.

**CONCEPT DESIGN:** Verifying and confirming the project’s design criteria based on the Conceptual Design Report are critical to project success. This will be the foundation of the design process and requires full consensus of the design team. We will focus on confirming and establishing any additional design criteria as needed, obtaining preliminary design information, evaluating alternatives, and confirming the approach is within the project budget.

**PRELIMINARY AND FINAL DESIGN:** Once concept design is complete, the Keller team will begin the final design phases, which include refining concepts, cost estimates, and plans. Additionally, during this phase we will proactively coordinate with the membrane supplier and Program Team to ensure final documents are clear and well defined.

## BID PLANS, ADVERTISEMENT, AND

**CONSTRUCTION:** We will assist the City in advertising, issuing addenda, bid evaluation, and providing services during construction.

## PROJECT MANAGEMENT

Jason King will serve as the Project Manager and lead the design team. Consistent communication, hands-on management, and responsiveness are key to your project’s success. Jason’s project management approach is centered around quality and efficiency and includes regular communication with our design team about schedule, project risks, and quality control, resulting in high-quality projects and service delivered at a great value.

Jason’s responsive and hands-on approach leads to results! His ability to continuously complete projects on time with less than 1% change orders illustrates his commitment to clients and maintaining quality throughout design and construction. Examples include:

Client	Construction Cost	Completion Dates	Change Orders
City of Lewiston	\$34M	05/2023	0.65%
City of Jerome	\$25M	09/2019	0.75%
Star Sewer & Water District	\$23M	03/2023	-0.54%

Jason will be supported by Site Civil Lead, Ryan Retzlaff. Recently, Jason and Ryan completed the critical Sandercock Reservoir rehabilitation project for the City—they have successfully worked with the City before and will continue to work collaboratively to achieve your goals and objectives.

## COORDINATION WITH THE CITY AND

**PROGRAM TEAM:** Our carefully selected project team will work with the City and Program Team to determine project needs and scope throughout development and make staffing changes with the teams’ input to fulfill project design needs. Each team member has been selected for their expertise and is fully committed to delivering this project.



We will meet frequently in person, holding bi-weekly coordination meetings and including supplemental staff as needed.

**Our transparent, collaborative approach brings task clarity; you will always know who will complete tasks and when they will be completed.** We will use MS Teams to allow access to screen sharing, presentations, and video conferencing to efficiently

transfer information and keep the project on track. Agendas, meeting notes, risk registries, and decision logs will be provided for all meetings to document decisions and increase the effectiveness of meetings.

We will provide deliverables to the City and Program Team to review ahead of progress meetings so that participants can prepare for the discussion. We will also work with the City and Program Team to develop project construction scheduling and workflow. **Our team is committed to meeting the City’s goal of having the new WTP online by January 2027.** The schedule and workflow will be used to plan for pre-purchase of any needed materials and equipment based on the timing of bid packages and construction.

Collaboration with the project team, City staff, Program Team, and regulatory agencies will be fundamental to the project’s success and meeting operational goals. Our approach includes:

- Defining consultant/City/Program Team responsibilities
- Bi-weekly meetings with City/Program Team
- Identifying challenges and recommending solutions, while seeking City/Program Team input
- Collaborating with regulators
- Keeping web-based file sharing current
- Incorporating City design preferences
- Communicating with operations during design, construction, and startup

**SCHEDULE CONTROL:** Keller has a successful record of completing projects ahead of schedule and under budget. Jason and the project team will review progress and develop a critical path schedule. Periodic reviews will allow for schedule updates, procedural changes, staff adjustments, and quality control reviews, ensuring the integrity of the product and continued on-time delivery.

**COST CONTROL:** Cost control is an essential component of any project for both engineering and construction. In addition to supporting your overall implementation, Jason will closely monitor engineering and construction budgets. Every month an earned value graph will be developed that shows the difference between planned and actual costs, showing if the project is on, over, or under budget and behind or ahead of schedule. If corrections are needed, we will establish a plan to address the issue before it becomes overwhelming. If these corrections involve the City or Program Team, we will proactively communicate them.

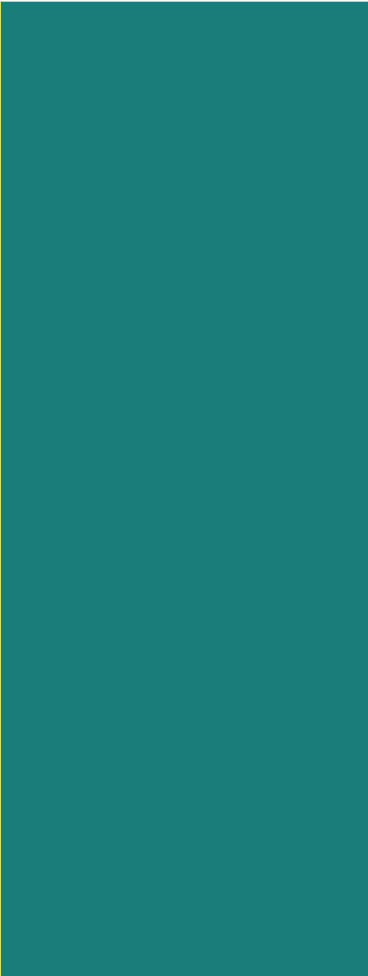
**QUALITY CONTROL:** Our team has an established process to help control costs and deliver the project on time and within budget. We have developed a Total Quality Management approach that embeds quality into all our services and deliverables and those of our subconsultant partners. Our approach begins with staffing the project with the right mix of junior and

**Keller’s Chief Engineer, David Kinzer, has over 40 years of multi-disciplinary engineering experience and will manage QA/QC.** senior technical specialists and subconsultants, including independent reviewers. Next,

we confirm that the team understands relevant design criteria, applicable standards, and background information and that, collectively, we are prepared to deliver the scope as described in the contract. With this approach, we will manage the budget to meet the agreed upon milestones and deliver a quality project to the City.



As a local firm, with staff you know, we are ready to deliver a successful project to the City.



**APPENDIX:**  
**Resumes**



# JASON KING, PE

Project Manager/Design Lead

Item # 5.

YEARS OF  
EXPERIENCE | 14



Jason King will serve as Project Manager for the City of Sandy's Alder Creek Water Treatment Plant (WTP) Upgrades project. He has extensive experience designing and managing water infrastructure projects. In the last five years, Jason has managed the design and construction of over \$100M in water and wastewater treatment improvements.

Jason has led the development of plans, specifications, and bidding documents for new and existing booster stations, well houses, water treatment facilities, and water distribution and control systems. He has extensive experience evaluating existing project constraints to meet his client's goals and priorities. Jason's experience and educational background has allowed him to efficiently analyze existing conditions, develop detailed recommendations, and communicate results with clients.

## EDUCATION

B.S., Civil  
Engineering  
University of Idaho

## PROFESSIONAL REGISTRATIONS

Oregon: 92481PE  
Idaho: 16695  
Nevada: 026871  
Utah: 13614243-2202  
Washington: 57287

In addition to design, Jason has managed construction services on multiple projects ranging from \$200,000 to \$35M. Jason understands the importance of communication and responsiveness throughout the construction phase, allowing him to oversee multiple successful construction projects.

## RELEVANT PROJECTS

**WTP Improvements / Amity, OR:** Quality Control and Technical Advisor for WTP improvements including water intake, treatment plant, and finished water clearwell. Treatment improvements included flocculation and inclined plate settlers, filter upgrades, backwash system, and other miscellaneous improvements.

**Farmington Fluoridation and Booster Pump Facility / Tualatin Valley Water District (TVWD), Beaverton, OR:** Provided pump selection support and evaluation for the 7.5 million gallons per day (MGD) booster pump station. Developed graphs to optimize pump performance and system efficiency.

**Water System Improvements / Emmett, ID:** Project Engineer and Construction Manager for water system improvements that included a 1.5 million-gallon (MG) storage reservoir, a 3,000 gallons per minute (gpm) booster pump station, a 3,000 gpm pressurized filtration system for hydrogen sulfide and manganese removal, over one mile of pressure pipe, and miscellaneous improvements for backup power to the distribution system.

**Water Supply and Treatment / Adrian, OR:** Design Lead for the design of a well facility, force main, and treatment facility. The project included an evaluation and pilot study for a new well and treatment to remove arsenic.

**Water System Improvements / Meridian, ID:** Design Manager for major upgrades at Well 16B, 16C, 17, and 32. Project Manager for water treatment upgrades and concept design support for Well 10B, 18, and 27. Projects included pressure filtration to remove iron/manganese from well water.

**7th Street Booster Pump Station / Truckee Meadows Water Authority (TMWA), Reno, NV:** Design Manager for a new 6,000 gpm booster pump station intended to replace two existing booster pump stations. This project included three pressure regulating stations and approximately 2,000 feet of 16-inch and 12-inch pipelines.

**Southshore Booster Pump Station / Lewiston, ID:** 17.3 MGD Southshore Booster Pump Station design included an evaluation to eliminate ragging issues, pump upgrades, piping improvements, and electrical upgrades to the City's main booster pump station.

**Terrace Street Raw Water Pump Station / Ashland, OR:** Project Manager/Design Lead for a new raw water pump station. Developed the mechanical layout for the 3.5 MGD booster station that allowed sufficient access for operation and maintenance in a 16-foot square building footprint.

**Park Estates Booster Station / Ashland, OR:** Design Manager for replacing an existing buried potable water pump station with a new five-pump system capable of delivering fire flows to structures bordering the City's forested boundary. Completed an in-depth pump selection to optimize the system that saw demands from 5 to 2,000 gpm. Included standby power, variable frequency drive (VFD) controls, a concrete masonry unit structure, and electrical/controls improvements. The design was completed in eight months to allow construction to occur during times of low demand.

**Water System Improvements / Washoe County, NV:** Provided technical design support for reuse water system improvements, including 18-inch diameter, 200+ psi pressure transmission pipeline, corrosion protection provisions, and surge evaluation.

**Tapteal 1 Booster Pump Station and Kennedy Water Main Improvements / Richland, WA:** Led technical design to upgrade additional pumping capacity, increasing total pumping capacity to 12,200 gpm. This project included evaluating several pump types and configurations due to net positive suction head available concerns. Ultimately a new booster pump station was designed to accommodate total capacity, and the existing booster pump station was converted into onsite sodium hypochlorite generation storage and delivery.

**Bel Mar Booster Station / Veolia, Boise, ID:** Design lead for the new 5,000 gpm facility. Included a phased approach to meet current and future demands, a wide range of flows and pressures, stand-by power, and a small footprint to fit within the site and permitting constraints.

**Disc Drive Booster Station / Reno, NV:** Design Manager for a new 16,000 gpm booster pump station intended to supplement system pressure during summer months when demands are nearly 1 billion gallons a week. This project included the design of 3,000 feet of 24-inch and 30-inch distribution mains.

**Blackwell Booster Pump Station / Coeur d'Alene, ID:** Technical Advisor for a new 1,200 gpm booster pump station. Duties included system optimization to effectively deliver demands ranging from 30 to 1,200 gpm.

**Water System Improvements / Cabinet Mountains Water District, Bonners Ferry, ID:** Technical Design Lead and provided quality assurance/quality control for three new booster stations with varying demands (100 to over 2,000 gpm). Included three water storage facilities varying from buried and above grade to elevated, ranging from 200,000 to 300,000 gallons of storage.

**Pilot Booster Pump Station / Mountain Home, ID:** Project Engineer for Pilot Booster Pump Station rehabilitation, including pumps to two pressure zones, three pumps, and 2,500 gpm combined capacity.

**Water System Pressure Zone Improvements / Twin Falls, ID:** Project Manager on recent water system improvements, creating a new pressure zone, and expanding water service and fire protection to industrial development. The project includes approximately 20,000 feet of 10- to 18-inch diameter transmission main and four pressure-reducing stations.



# LARRY RUPP, PE

Principal-in-Charge

YEARS OF  
EXPERIENCE | 25



As Principal-in-Charge, Larry Rupp will provide senior technical expertise so that the City's project is completed on time and with well-vetted solutions. He will see that Keller's high standard of care is maintained and that the project has the necessary company resources to be successful.

Larry is a Professional Engineer with 25 years of experience designing and constructing municipal water treatment systems. Larry manages complex water tanks, pumping, and treatment facility projects. His attention to detail has resulted in minimal change orders.

## EDUCATION

M.S.,  
Civil/Environmental  
Engineering  
Brigham Young  
University

## PROFESSIONAL REGISTRATIONS

Oregon: 79040PE  
California: 85072  
Idaho: 11629  
Montana: 60078  
Nevada: 19320  
Washington: 44983  
Wyoming: 16114

## RELEVANT PROJECTS

**Water Treatment Plant (WTP) Improvements / Amity, OR:** Principal and Technical Advisor for WTP improvements including water intake, treatment plant, and finished water clearwell. Treatment improvements included flocculation and inclined plate settlers, filter upgrades, backwash system, and other miscellaneous improvements.

**Point of the Mountain WTP / Salt Lake City/Sandy, UT:** Assisted in design of 70 million gallons per day (MGD) WTP for the Metropolitan Water District. Services included process selection involving conventional pretreatment, followed by ozonation, biologically active filters, and UV disinfection. Design support for chemical feed system, hydraulic analysis, and equipment selection.

**Central Treatment Facility and Booster Station / Victor Valley Water District, Victorville, CA:** Managed the centralized arsenic removal facility with vertical pressure vessel filters and 3,000 gallons per minute (gpm) booster station.

**Willamette River WTP / Wilsonville, OR:** Capacity analysis for unit operations, including river intake, ballasted clarification, ozone, granular media filters, chlorine disinfection, chemical facilities, raw water, and finished water pumps with recommendations to meet current and future demands.

**Water System Improvements / Emmett, ID:** Managed water system improvements that included a 1.5 million-gallon storage reservoir, 3,000 gpm booster pump station, a 3,000 gpm pressurized filtration system for hydrogen sulfide and manganese removal, over one mile of pressure pipe, and miscellaneous improvements for backup power to the distribution system.

**Farmington Fluoridation and Booster Pump Facility / Tualatin Valley Water District, Beaverton, OR:** Principal/Technical Advisor for a 7.5 MGD booster pump station, 4 MGD firm, 17 MGD fluoridation treatment, and a hydraulic flow-through capacity. The design included pump selection, site evaluation/grading, pipeline route evaluation and selection, mechanical and structural building information modeling, initial electrical evaluation, fluoridation evaluation, and coordination with permitting agencies.

**Water Supply and Treatment / Adrian, OR:** Principal/Technical Advisor for the design of a well facility, force main, and treatment facility. The project included an evaluation and pilot study for a new well and treatment to remove arsenic.

**WTP Evaluation / Silverton, OR:** Performance and condition evaluation of treatment facilities. Developed an implementation plan for completing needed upgrades. Plan included operational recommendations, as well as phasing of capital improvements.



**EDUCATION**  
M.S.,  
Civil/Environmental  
Engineering  
Portland State  
University

With 26 years of experience leading complex projects throughout the Northwest, Ryan Retzlaff’s diverse work background ranges from permitting to construction support for water distribution systems. He is well-known in the Pacific Northwest for his planning and hydraulic modeling expertise and has managed or led in-depth studies for cities, counties, and flood control districts of all sizes. Ryan’s experience includes construction management for treatment facilities, hydrologic and hydraulic studies for bridges and structures, stormwater quality facility design using low impact development, and stormwater management design for large transportation projects. He has extensive experience designing stormwater facilities across Oregon, meeting Clean Water Services’ standards for storage, treatment, and conveyance.

## RELEVANT PROJECTS

**Storm Planning and Design / Washington County, OR:** Lead Designer for over 100 projects throughout Washington County. Past experience includes water quality treatment, flow control, and conveyance design for a wide range of land uses such as commercial, retail, residential, and transportation. Each project required detailed investigation to meet Clean Water Services’ and the local jurisdictions’ standards.

**Olsen Creek Storm and Sanitary Realignment / Newport, OR:** Project Manager and decommissioning design of a sanitary pump station, realigning storm and sanitary gravity lines, permitting wetland disturbance, and trenchless construction of a 250-foot, 30-inch conduit to house both storm and sanitary pipes.

**Dundee Bypass Storm Design / Newberg, OR:** Designed infrastructure to address all stormwater conveyance, detention, and treatment facilities associated with nearly 5 miles of new highway and 1.5 miles of existing roadway improvements. Coordination of project elements to ensure regulatory compliance, feasibility, and constructability.

**Mill Plain Stormwater Analysis and Design / Vancouver, WA:** Project Manager directing the evaluation and subsequent design. Developed a hydrologic/hydraulic model to evaluate and validate flooding along Mill Plain Boulevard. The validated model evaluated flood mitigation alternatives and developed a plan to reduce or eliminate flooding. Worked with City staff and private developers to identify locations where flood storage or mitigation facilities could be placed (the primary solution was an infiltration gallery). The City purchased all materials, and the private developer agreed to construct the facility.

**Sandy Drainage Improvement Company (SDIC) Drainage Master Plan / Troutdale, OR:** Oversaw the drainage study, incorporating the needs and objectives of SDIC and the City of Troutdale. The study provided an updated hydrologic and hydraulic model, problem area identification, and an assessment of the Blue Lake area and the Salmon Creek weir structure.

Evaluated the Blue Lake storage area, its influence on the water surface elevations at the SDIC pump station, and the implications on the existing gate tower and levee culvert to determine how the storage impacted overall water surface elevations during a large flood event.

The study provided an overall assessment of conveyance infrastructure and guidance for existing and future pump station capacity improvements. Completed a water quality assessment to advance water quality treatment throughout the City and address regulatory requirements.

# PETER OLSEN, PE, CWRE

Construction Support Services



## EDUCATION

M.S., Civil  
Engineering  
Brigham Young  
University

## PROFESSIONAL REGISTRATIONS

Oregon: 83510PE  
Idaho: 13824  
Washington: 46680

Peter Olsen brings extensive technical experience working with Oregon communities on their water infrastructure projects and will provide construction support services for the City of Sandy. Peter's technical understanding of capital improvement projects for municipal clients includes extensive pump station and pipeline design involving hydraulics and computer modeling software. Peter has also provided design, environmental document preparation, public meeting support, construction management, and inspection on utility pipeline projects and complex treatment facilities. Peter's design experience is complemented by his planning and construction management experience, including construction engineering and inspection for all the capital projects he has been involved in and water master planning and modeling for communities throughout Oregon.

He has worked on numerous reservoirs, pump stations, and pipeline projects, including Wood Village, Ashland, Wilsonville, and Amity, Oregon—projects with similar permitting, design, and schedule challenges.

## RELEVANT PROJECTS

**Grabhorn Reservoir, Valve House, and Pipelines and Farmington Fluoridation and Pump Facility / Tualatin Valley Water District, Beaverton, OR:** Construction Phase Project Manager for Grabhorn Reservoir project, including civil/storm design and permitting support during design. Project Manager for Farmington Fluoridation and Pump Facility project for the 7 million gallons per day (MGD) pump station, 17 MGD fluoridation facility, and 10,000 feet of 18-inch discharge main.

**Water Treatment Plant (WTP) Improvements / Amity, OR:** Project Manager for new surface water intake, WTP upgrades, pipeline improvements, and reservoir upgrades. Coordinating construction phase services.

**Pump Stations and Pipelines / Ashland, OR:** Coordinated design and construction phase service activities for two major water pumping facilities and associated pipelines.

**Crestview Waterline / Salem, OR:** Project Manager for the Crestview Waterline project (ongoing), including 2,000 feet of 18-inch ductile water line and 500 feet of 8-inch ductile water line.

**Water System Improvements / Silverton, OR:** Managed design and construction phase services for multiple pipeline rehabilitation projects, a new pressure reducing valve (PRV) station, Lincoln Street roadway improvements, and pump station upgrades.

**Water System Improvements / Wood Village, OR:** Project Manager for Wood Village Boulevard water/sewer pipelines, a new PRV near Well 4, Wood Village Green pipeline replacement for fire flow improvements, and new pressure zone modifications.

**Water Master Planning / St. Helens, OR:** Project Manager for the water management and conservation plan and water master planning.

**Water System Improvements / Willamina, OR:** Project Manager for the water master plan, concept design and support, and City Engineer plan reviews. Supporting Project Engineer for the new water intake water system improvements project, raw water pipeline, booster pump station and distribution pipeline.

# BRYAN PHINNEY, PE, D.WRE

Water Treatment Lead

YEARS OF  
EXPERIENCE | 26



Bryan Phinney is a civil and environmental engineer with 26 years of engineering experience, preceded by four years of water treatment plant (WTP) operations experience. He has analyzed and designed many elements of municipal water systems, including advanced treatment, enhanced coagulation, membranes, disinfection (gas chlorine, sodium and calcium hypochlorite, UV, and chlorine dioxide), unique chemical feed systems to address water stabilization (lead and copper reduction), taste and odor (hydrogen sulfide, organics), and metals oxidation and sequestering (iron, manganese, arsenic). Bryan has also developed water supplies including springs, wells, and surface water intake structures.

## EDUCATION

M.S., Civil  
Engineering  
University of  
Wyoming

Bryan has led the master planning and design of water treatment system improvements with complex hydraulic challenges. This effort has included systems that meet challenging demand scenarios (50 to 4,500 gallons per minute (gpm)) and pressure challenges (up to 300 psi transmission).

## PROFESSIONAL REGISTRATIONS

Oregon: 73236PE  
Idaho: 10394  
Nevada: 028664  
Utah: 12234177-2202  
Washington: 56762  
Wyoming: 9515

Bryan recently served as the Intermountain Section Director for the American Water Works Association and can tap into resources at the national, regional, and local levels. His industry involvement spans two and a half decades, giving him access to industry experts and current water industry trends. This involvement provides Keller's clients with finished products that meet future growth needs and account for regulatory changes in the drinking water industry.

## RELEVANT PROJECTS

**Water System Improvements / Ashland, OR:** Senior Water Treatment Discipline Lead for a 600 gpm surface WTP expansion, including solids contact clarification, dual media filtration, disinfection, pumping, and controls integration with existing processes.

**Water System Improvements / Amador Water Agency, Amador County, CA:** Senior Project Manager overseeing the master planning for four treatment plants, a treatment plant capacity study for two treatment plants, tanner filter improvements, and a disinfection by-products study including evaluation of PG&E's Tiger Creek Power Plant Water Treatment Facility.

**Farmington Fluoridation and Booster Pump Facility / Tualatin Valley Water District, Beaverton, OR:** Senior Process Engineer for 17.0 million gallons per day (MGD) finished water fluoridation facility appurtenant to a new water booster station.

**WTP Improvements / Amity, OR:** Senior Water Treatment Discipline Lead for 600 gpm surface WTP expansion, including solids contact clarification, dual media filtration, disinfection, pumping, and controls integration with existing processes.

**Iron and Manganese Study / Carson City, NV:** Senior Water Treatment Discipline Lead evaluating six groundwater wells producing iron and manganese above the secondary maximum contaminant level and recommending local and regional treatment options and best management practices.

**WTP / Ontario, OR:** Design for the 4 MGD (expandable to 6 MGD) expansion of the City's water treatment facility, including 14 MGD onsite sodium hypochlorite generation facility.

**Silver Creek Raw Water Intake and Pipeline / Silverton, OR:** Senior Process Engineer for the design to replace the existing river intake structure and pump station—which is expandable to a triplex system—a new fish screen and backwash system, nearly 1,500 feet of pipeline, and trenchless rehabilitation of approximately 300 feet of pipeline.



# ROCK XU, PE, PhD

Chemical Process Engineer

Item # 5.

YEARS OF  
EXPERIENCE | 12



Rock Xu is a process and chemical engineer with a wealth of experience strategically planning, designing, and testing water treatment processes. His proficiency extends to conducting feasibility evaluations, process modeling, and developing and testing innovative system designs.

Rock possesses considerable expertise in system design, on-site technical support, and the meticulous analysis of data. With a robust background in chemistry, he has served as a Quality Control Manager overseeing process design and testing across various domains, encompassing coagulation/flocculation (jar test, dissolved air flotation, microsand), filtration (greensand, granular media, reverse osmosis, biofiltration), ion exchange, and oxidation (involving chemical oxidation, UV advanced oxidation process, ozone).

Rock has spearheaded numerous pilot testing initiatives for wastewater treatment in South Carolina, Georgia, and North Carolina, successfully removing heavy metals and metalloids. His extensive involvement in these projects has equipped him with profound insights into technology screening and process optimization.

## EDUCATION

PhD, Chemical Engineering,  
University of Chinese Academy of Sciences

M.S., Chemical Engineering,  
Tianjin University

## PROFESSIONAL REGISTRATIONS

Oregon: 103990PE  
Idaho: 20844  
Texas: 130466

## RELEVANT PROJECTS

**Water Treatment Plant (WTP) Disinfection By-Products Removal / Amador Water Agency, Amador County, CA:** Water Treatment Technical Lead performing a comprehensive evaluation of the treatment processes. Conducted process optimization for the Lone, Tanner, Buckhorn, and Tiger Creek WTPs.

**WTP Analysis / Tampa Bay, FL:** Water Treatment Technical Lead and Quality Control Manager completing comprehensive treatment process testing, modeling, and process optimization.

**WTP Chemistry Evaluation / Salem, OR:** Water Treatment Technical Lead and Quality Control Manager evaluating algal toxin removal and disinfection by-products formation, including a thorough examination of coagulation/flocculation, ozone, biofiltration, and polyaluminium chloride.

**Advanced Process Design / Sacramento, CA:** Water Treatment Technical Lead and Quality Control Manager engaged in treatment method screening and process design for disinfection by-products control.

**Water Corrosion and Color Control / Tamarack Resort, Tamarack, ID:** Water Treatment Technical Lead developing a facility plan. Conducted data analysis to optimize corrosion control and enhance iron and manganese removal.

**Lucky Friday Silver Mining Water Treatment / Mullin, ID:** Water Quality Pilot Study Lead, assisting in developing a facility plan to optimize conventional and membrane treatment options for removing four targeted metals from mine water.

# LUKE TABOR, PE

Project Engineer

Item # 5.

YEARS OF  
EXPERIENCE | 5



Luke Tabor has a diverse background in both the public and private sectors, providing him with a comprehensive understanding of design and planning. His expertise lies in municipal projects, particularly in stormwater, wastewater, and water utilities. Luke has been involved in various aspects of projects, including facility evaluations, master planning, hydraulic modeling, design, bidding administration, and construction observation and management.

## EDUCATION

B.S.,  
Environmental  
Engineering  
San Diego State  
University

Recently, Luke has focused on pipeline projects, notably leading the Willamina Water System Improvements project. As a Project Engineer, he oversaw the design, bid administration, and construction management of approximately 7,000 feet of water pipeline, booster station upgrades, raw water intake replacement, and more. Additionally, Luke was the Project Engineer for the Silver Creek Water Intake project, which involved 1,500 feet of replacement pipeline and a new 3.84 million gallons per day (MGD) raw water pump station with a sophisticated mechanical spray bar cleaning system for the water intake screen.

## PROFESSIONAL REGISTRATIONS

Oregon: 100223PE

## RELEVANT PROJECTS

**Water System Improvements Project / Aurora, OR:** Project Manager for the Aurora Water System Improvements project. The improvements include a new 1.2 million-gallon prestressed concrete reservoir, a four pump booster station, a new well, 2,000 feet of offsite piping located within existing easements or right-of-way, onsite overflow pond, yard piping, level sensing, intrusion alarms, a water meter, a Tideflex mixing system, and SCADA improvements. This project is currently in design.

**Water System Improvements Project / Willamina, OR:** Project Engineer for the Willamina Water System Improvements project which consisted of completing a Water Management and Conservation Plan and replacement or improvements to the intake structure in Willamina Creek, the sediment removal system, 3,400 feet of raw water pipeline, the stormwater outfall, the 6th Street booster pump station, and 3,500 feet of distribution main line. Luke also provided final modeling and design of a subsurface gravel wetland.

**Silver Creek Water Intake Project / Silverton, OR:** Project Engineer for the design, bidding, and construction of a new raw water pump station with an active fish screen and 1,500 feet of replacement pipeline.

**Aquifer Storage and Recovery (ASR) Planning Study/ Silverton, OR:** Project Engineer for the Silverton ASR Study. Identified volumes and rates of water available for ASR storage and potential areas that may be favorable for an ASR system. Completed all water modeling during evaluation.

**Reservoir Siting Study / Aurora, OR:** Project Engineer for the Aurora Reservoir Siting Study. Performed life-cycle analysis on mixing, material, and roof alternatives. Developed 10% concept design showing site civil layout and tank orientation.

**City Engineering / Aurora, OR:** Support City Engineering tasks by reviewing development applications and construction documents, participating in pre-application meetings, and miscellaneous public utility engineering support.

# ADAM NEIWERT, PE

Electrical

Item # 5.

YEARS OF  
EXPERIENCE | 18



Adam Neiwert serves as a Lead Electrical Engineer at Keller and will provide electrical support on this project. He has extensive experience working on new and existing electrical systems for municipal water systems. Adam is involved in all project stages, including scoping, budgeting, preliminary design, site evaluation, final design, and construction. His municipal engineering design expertise includes electrical service evaluation, standby power generation, pump station controls, motor control center design, variable frequency drives (VFD), harmonic filtering, developing controls strategies, cost estimation, and on-site troubleshooting. Recent water projects include in-ground and above-grade water storage tanks and new and existing booster stations and well house components.

## EDUCATION

B.S., Electrical  
Engineering  
Boise State  
University

## PROFESSIONAL REGISTRATIONS

Oregon: 87153PE  
California: 20747  
Idaho: 15164  
Nevada: 024399  
Utah: 10519940-  
2202  
Washington: 50858  
Wyoming: 15332

## RELEVANT PROJECTS

**Water Treatment Plant (WTP) Improvements / Amity, OR:** Electrical service and distribution, lighting, motors and controls, emergency power evaluation, and generator sizing analysis for new raw water intake facility and WTP upgrades.

**Terrace Street and Park Estates Pump Stations / Ashland, OR:** Led new pump station electrical service, standby generator, motor control center, manual transfer switch, and active harmonic filter design.

**Farmington Fluoridation and Booster Pump Facility / Tualatin Valley Water District (TVWD), Beaverton, OR:** Electrical Engineer of Record for 7 million gallons per day (MGD) pump station, 17 MGD fluoridation facility, and 10,000 feet of 18-inch discharge main.

**Grabhorn Reservoir, Valve House, and Pipelines / TVWD, Beaverton, OR:** Led valve building, electrical, instrumentation, and controls design.

**Spring Creek Booster Pump Station / Washoe County, NV:** Led electrical design, including a new 50 HP booster pump with a soft start, exterior building lighting, piping modifications with valving modifications, pressure transmitters, new pump and instrumentation, electrical and control wiring, and adding a generator connection box in a readily accessible location. Led existing conditions assessment, circuit coordination study, arc flash study, and updated arc flash labels to reflect final conditions.

**Well 6 Booster Station / Chubbuck, ID:** Led electrical team's design, including new 800-amp electrical service and standby generator, new 100 HP well pump on VFD control, and three 125 HP booster pumps. Coordinated the design for the programmable logic controller control panels and instrumentation.

**Hiline Booster Pump Station / Chubbuck, ID:** Led the electrical design for the booster pump station, including VFD controls for four initial pumps, provisions for two additional 100 HP pumps, new 1200-amp electrical service, and standby power system with 500 kW generator.

**Bel Mar Booster Station / Veolia, Boise, ID:** Electrical and Controls Design Lead for PRVs, high- and low-pressure ranges connectivity to the existing transmission line, and valve vault.

**Water Project Electrical Systems / Star, ID:** Led electrical design to repurpose the existing standby power generator at the water well and booster station building. Electrical design components included pump VFDs; SCADA communication compatible with the client's existing SCADA system; site lighting; harmonic filtration; an extension of fiber optic to the well, booster station, and tank site; and a new tower and radio meter reading system.

# BRADLEY CULVER, PE

Item # 5.

Controls

YEARS OF  
EXPERIENCE | 14



Bradley Culver brings varied industry experience in electrical and controls to the team, from conceptual design and detailed engineering to construction, commissioning, start-up, and on-site troubleshooting. His experience has included power system distribution, medium and low voltage equipment specifications and configuration, overcurrent protective device coordination, arc-flash calculations, control system design, instrument specifications, and process control programmable logic controller programming.

## EDUCATION

M.S., Electrical  
Engineering  
Kansas State  
University

Bradley is responsible for the execution of work and the quality of deliverables from the electrical and controls team. He has extensive knowledge of industry best practices and various electrical design code requirements, including the National Fire Protection Association, UL Standards, Institute of Electrical and Electronics Engineers standards, and the International Energy Conservation Code.

## PROFESSIONAL REGISTRATIONS

Oregon: 97265PE  
Delaware: 23275  
Florida: 91537  
Idaho: 19242  
Montana: 73235  
Texas: 138648  
Washington:  
20103376

## RELEVANT PROJECTS

### **Tapteal 1 Booster Pump Station and Kennedy Water Main**

**Improvements / Richland, WA:** Completed new pump station electrical and controls design. Led the electrical and controls design for replacement booster station with added pumping capacity.

**Blackwell Booster Station / Coeur d'Alene, ID:** Completed new facility design for a booster station to meet forecasted community needs for added water capacity. Electrical power and controls design, including specification of a backup generator, utility coordination for extending medium voltage distribution and service entrance, and power distribution within a new building.

### **Water System Improvements / Cabinet Mountains Water District, Bonners Ferry, ID:**

Electrical and Controls Design Lead for two retrofits, one selective demolition, and four new facilities. Utility coordination and power system design for each facility. Controls specification and network interconnection for communication to new District SCADA system.

**Falls Irrigation District Pump Station / American Falls, ID:** Provided design of medium voltage power distribution and motor controls. Specification of substation switchyard transformer, medium-voltage switchgear, and variable frequency drives. Low voltage power distribution to ancillary equipment. Facility controls and sequence of operations via new SCADA connection.

**Silverton Dewatering / Silverton, OR:** Electrical and controls design for new building and dewatering screw press. Integration to existing facility via feed and communication to existing infrastructure. Responsible for construction coordination and submittal reviews.



# CURTIS BUTTERFIELD, PE

HVAC/Plumbing

Item # 5.

YEARS OF  
EXPERIENCE | 7



Curtis Butterfield provides planning, design, and construction support for HVAC, plumbing, and process mechanical. His experience in these areas is augmented by his work with heat load evaluations, hydraulic analysis, piping, and mechanical design. Through the years, he has acquired extensive practical experience as a plumbing mechanical designer, installer, and contractor. He brings over seven years of engineering experience and 15 years of plumbing mechanical experience to our project team.

## EDUCATION

B.S., Civil  
Engineering  
Boise State  
University

## PROFESSIONAL REGISTRATIONS

Oregon: 101193PE  
Idaho: 21179  
Washington:  
22018424

Throughout his time with Keller, Curtis has worked on various types of projects, including booster stations, lift stations, water and wastewater treatment, warehouses, workshops, office space, laboratory, and more. Curtis has performed a range of tasks to support these projects, including interdisciplinary project coordination, technical calculations, site work, facility and equipment layouts, design, technical reports, assembling construction documents, bid services and evaluations, project cost estimating, and serving as owner's representative during construction. With his unique skill set, Curtis can provide a broad perspective and design approach that results in functional and cost-effective solutions.

## RELEVANT PROJECTS

**Water Treatment Plant (WTP) Improvements / Amity, OR:** Provided HVAC and plumbing systems design, which included a process room, electrical room, lab, and bathroom. Improved system components included air conditioning, ventilation, heating, exhaust, HVAC controls, emergency shower, fume hoods, water heating, area drains, etc.

**Well 18 and Treatment Facility / Meridian, ID:** The Well 18 facility included treatment for manganese and iron. Curtis provided the HVAC and plumbing designs and inspections during construction. The design was installed by the contractor without any HVAC/plumbing related change orders.

**North Booster Station / Nampa, ID:** HVAC and Plumbing Mechanical Lead, provided mechanical design services in support of booster station design.

**Disc Drive and 7th Street Booster Stations / Truckee Meadows Water Authority, Reno, NV:** HVAC and Plumbing Mechanical Lead, provided mechanical design services in support of booster station design.

**Wastewater Treatment Plant (WWTP) Lab / Caldwell, ID:** Provided the HVAC and plumbing designs and construction observation for Caldwell's WWTP lab building. The system included bathrooms, a bacteria handling room, office, and laboratory space. The HVAC system was designed as a dual zone system to prevent the recirculation of contaminated air. The plumbing system included domestic and chemical drains.

**Water Improvements / Pomeroy, WA:** Design Team Lead, coordinated with design team in planning and design of a 1,200 gallons per minute (gpm) booster station.

**Tapteal 1 Booster Pump Station and Kennedy Water Main Improvements / Richland, WA:** Led the Keller design team and coordinated with City staff to design a 12,200 gpm booster station and 100 pounds-per-day on-site sodium hypochlorite generation system. This project is currently under construction and Curtis is providing construction support services to the City.



Scott Bellis is a licensed Structural Engineer in the State of Oregon with 11 years of structural engineering experience, including more than four years of experience in the water treatment, wastewater treatment, and drinking water infrastructure sector. His experience includes the design of several water and wastewater treatment facilities including new plant buildings and hydraulic structures, retrofits to existing plant buildings and hydraulic structures, and equipment replacement and rehabilitation projects across the western United States, including both high and medium seismic regions.

### EDUCATION

M.S., Structural  
Engineering  
Northwestern  
University

### PROFESSIONAL REGISTRATIONS

Oregon:  
93333PE/SE  
California: 86949  
Colorado: 58598  
Idaho: 22489  
Nevada: 031615  
Washington:  
23026265

### RELEVANT PROJECTS

**Water Reservoir and Booster Pump Station / Rigby, ID:** Structural Lead for a new 1.5 million-gallon prestressed concrete tank with a booster pump station installed on the roof. The pump station building consists of concrete masonry unit walls and wood truss roof.

**LeChee Water Treatment Plant (WTP) / LeChee, AZ:** Structural Lead for a new WTP building servicing Navajo Nation. Project included a new treatment building housing filter vessels, chemical storage, administration space, and electrical room. Building used concrete masonry unit walls with an open web steel joist framed roof.

**Brighton WTP / Brighton, CO:** Structural Lead for a major expansion to the Brighton WTP. Project included a finished water pump station building constructed over a disinfection contact basin, a large combined building housing granular activated carbon and greensand filtration, denitrification, pellet softening, electrical and administration building and chemical storage, a raw water blend tank, a backwash storage tank constructed on drilled piers, and modifications to existing hydraulic structures. Buildings had precast concrete walls and precast concrete double tee roofs, with basins made from reinforced concrete.

**Durham Wastewater Treatment Plant (WWTP) / Tigard, OR:** Project Manager and Structural Lead for grit system rehabilitation project at the headworks facility. Project included replacing blowers and diffusers and rehabilitation work on grit piping and pipe supports and concrete elements.

**WWTP / Gresham, OR:** Structural Lead on fats, oils, and grease (FOG) improvements project at the WWTP which included replacing FOG pumps and adding a new strain press and other miscellaneous equipment.

**Willow Lake WWTP / Salem, OR:** Acted as Structural Lead for multiple projects at the Willow Lake WWTP, including expansion of the existing biosolids storage facility, new access stairs and platforms at trickling filters, and condition assessment of the North Secondary Clarifier as part of replacement of the central rotating mechanism. Project also included a condition assessment of the existing walkways at several other primary clarifiers on-site.

**Central Valley WWTP / Salt Lake City, UT:** Designed several hydraulic structures including multiple connector boxes and channels, large diameter aeration pipe supports, mixer access walkways at aeration basins, and concrete infill of an existing aeration basin as part of the tertiary treatment/nutrient removal plantwide upgrade project.

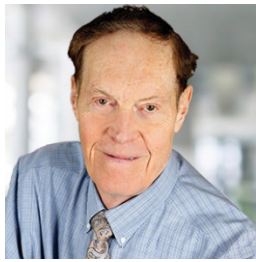
# DAVID KINZER, PE

Quality Assurance/Quality Control

Item # 5.

YEARS OF  
EXPERIENCE

40+



David Kinzer has more than 40 years of experience on all types of water engineering projects. In 2018, he was recognized as the American Society of Civil Engineers Southern Idaho Engineer of the Year. He offers extensive experience designing and evaluating site civil work, piping, pumping facilities, valve stations, and structures. He completes mechanical and structural work for Keller including inspection, evaluation, and design of water facilities. David's pipeline experience includes design of hundreds of miles of pipelines using a variety of pipeline materials (steel, HDPE, ductile iron (DI), PVC), high pressure conveyance, rock excavation, and corrosion protection measures.

## EDUCATION

B.S., Civil  
Engineering  
University of Idaho

## PROFESSIONAL REGISTRATIONS

Oregon: 83080PE  
Colorado: 11764  
Idaho: 2659  
Washington: 33989

Throughout his career, he has acquired expertise in all phases of project development. His extensive and varied experience allows him to effectively complete quality control on all water project components. David understands construction practices and can seamlessly integrate multiple disciplines to deliver high-quality, comprehensive projects.

## RELEVANT PROJECTS

**Water System Improvements / Ashland, OR:** Completed analysis for Talent Irrigation District pipeline conditions evaluation, including several material tests to assess pipe characteristics and material strength, and pressure tests (200+ psi) to identify leaks and operating conditions. Also provided raw water and finish water pump station and pipeline design support.

**Effluent Pipeline / Ontario, OR:** Involved in the design of more than 15 miles of pipelines and multiple pump station and storage facility upgrades. One high-pressure pipeline project included over 4 miles of transmission pipelines conveying water to an irrigation storage lagoon at the Snake River Correctional Institution.

**Langley Gulch Water Supply / Idaho Power Company, New Plymouth, ID:** Design of 9-mile transmission pipeline, with sections experiencing 350 psi. Completed an energy recovery analysis, oversaw the surge analysis, and completed a life-cycle analysis evaluating alternative pipeline materials and pipe sizes.

**Water System Improvements / Nampa, ID:** Quality control for potable water and pressure irrigation designs including multiple pressure reducing valve station, waterway crossing (aerial, bored, and open cut) well, and booster station projects.

**Spaulding Booster Station / Pocatello, ID:** Technical Advisor and provided quality control reviews of Spaulding Booster Station and transmission pipeline mechanical components.

**Water System Improvements / Mountain Home, ID:** Technical Advisor for 12- to 28-inch high pressure water transmission pipelines that included HDPE, DI, and PVC pipe materials.

**Seamans Gulch Pump Station and Pipeline / Garden City, ID:** Construction of a high-pressure (125+ psi) water pump station to pump water from a reservoir in Seamans Gulch to a water storage reservoir located in United Water's Hidden Springs water system. Ultimately a new booster pump station was designed to accommodate total capacity, and the existing booster pump station was converted into on-site sodium hypochlorite generation storage and delivery.

**Water Intake Valve Vault Diversion / Weiser, ID:** Structural Engineer for reconstruction of the intake pump station valve vault facilities on Weiser River which included extensive shoring, helical piles as a foundation for the valve vault, and river channel evaluations to assess siltation potential.



Jean von Barga Root has been practicing architecture in the Pacific Northwest for 30 years. As Principal and Director of Sustainability, she leads MWA's efforts in resilient design, focusing on materials, energy, water, and social justice. She has successfully designed and managed four LEED-certified projects, including wastewater facilities and mixed-use housing. Understanding sustainable design as an integrated process, Jean advocates for the owner while collaborating with stakeholders, the project team, and the contractor.

**EDUCATION**

Master of  
Architecture  
University of  
Oregon

B.A., Architecture  
University of  
Washington

**LICENSES**

Registered  
Architect: Oregon:  
4830

National Council of  
Architectural  
Registration  
Boards: 90374

LEED Accredited  
Professional  
Building Design +  
Construction:  
10056836

Project  
Management  
Professional:  
2039391

Associate DBIA

**AFFILIATIONS**

American Water  
Works Association

American Council  
of Engineering  
Companies

**RELEVANT PROJECTS**

**Bull Run Filtration Project (Net Zero) / Portland, OR:** New construction of 90-acre filtration campus, estimated construction cost of \$820M, estimated completion in 2027.

**Pendleton Bus Barn (Net Zero) / Pendleton, OR:** New construction of 7,750 square-foot (SF) administration facility, transportation bus facility, and bus shelter facility funded by Federal Transportation Administration Grant, estimated completion in 2024.

**King County Jameson/ArcWeld Buildings Replacement Project (Net Positive/Living Building) / Seattle, WA:** New construction of 62,000 SF campus, estimated construction cost of \$32M, estimated completion in 2024.

**Portland Water Bureau Interstate Operations and Maintenance (O&M) Campus (LEED Gold) / Portland, OR:** Renovation of 78,000 SF facility, construction cost of \$36M, completed 2016.

**Clean Water Services O&M Building Master Plan / Tigard, OR:** Renovation and addition to 35,000 SF facility, construction cost of \$10M, completed in 2019.

**Oak Harbor Clean Water Facility / Oak Harbor, WA:** New construction of 3-acre facility, construction cost of \$119M, completed in 2018.

**Chambers Creek Water Treatment Plant Headworks Replacement / University Place, WA:** Renovation of 89-acre campus, construction cost of \$350M, completed in 2017.

**City of Portland Emergency Coordination Center (LEED Gold) / Portland, OR:** New construction of 30,000 SF LEED Gold facility, construction cost of \$12.3M, completed in 2014.

**Spokane International Airport Administrative Building (LEED Gold) / Spokane, WA:** New construction of 25,000 SF of office space and 20,000 SF of parking garage, estimated construction cost of \$15.6M, estimated completion in 2025.





# Yuxin (Wolfe) Lang, PE, GE, PEng

## Principal Engineer



### Education

- MS, Civil Engineering, University of Waterloo, Ontario, 2002
- BS, Geological Engineering, Hebei Institute of Civil Engineering, China, 1993

### Registrations/Certifications

- Professional Civil Engineer (Geotechnical): OR, #78866, 2007
- Professional Civil Engineer: WA, #44381, 2008; Ontario, Canada, #100049788, 2004; British Columbia, Canada, #32134, 2008
- Geotechnical Engineer: OR, #78866, 2009

### Expertise

- Foundations
- Ground improvement systems
- Soil retaining structures.
- Shoring design
- Groundwater control
- Slope stabilization
- Landslide remediation
- Soil improvement
- Construction consultation

Wolfe Lang has 30 years of geotechnical engineering experience, and his focus is on water, wastewater, and conveyance projects. He has a strong background in analyzing and designing various foundations, deep excavations and tunnels. He has expertise in seismic ground motion characterization analysis, liquefaction analyses, and seismic soil-structure and soil-pipe design. His water, wastewater, and conveyance projects include new treatment facilities and reservoirs, seismic rehab of existing facilities, deep pump stations, pipelines, and trenchless crossings. Wolfe has provided senior geotechnical review for field exploration, subsurface condition interpretation, seismic hazards evaluation, dewatering, and pipe/trench construction considerations.

### Relevant Experience

#### Alder Creek WTP Improvement Preliminary Design, Clackamas County, OR (2023)

Wolfe was the geotechnical lead for the proposed improvements at Alder Creek Water Treatment Plant. Delve Underground conducted geotechnical exploration at the proposed improvement site and developed preliminary geotechnical recommendations.

#### Bull Run Filtration Facility to Sandy Pipeline and Pump Station, Clackamas County, OR (2023-Present)

Wolfe is the geotechnical lead for the pipeline and pump station project between Bull Run Filtration Facility and the City of Sandy. Delve Underground conducted geotechnical explorations along the proposed pipeline alignment and developed preliminary geotechnical recommendations. Currently, Wolfe is working on the detailed design stage and will develop detailed geotechnical recommendations for the pipeline, creek crossing, pump station and treatment facilities.

#### Bull Run Filtration Facility, City of Portland Water Bureau, Multnomah and Clackamas Counties, OR (2020-Present)

Wolfe is the geotechnical and seismic mitigation design lead for the new 135 MGD Bull Run Filtration Facility. The geotechnical challenges included shallow slope stability issues, seismic

ground deformation hazard, shallow groundwater, and deep excavations. The investigation and evaluation included field exploration of more than 20 borings and other instruments; cyclic shear testing on soil samples, seismic liquefaction and ground deformation modeling, site response and amplification analysis, foundation options evaluation (deep foundation vs shallow foundation), mat foundation design recommendations, pavement design, groundwater control and excavation slope recommendations, preparation of geotechnical reports; and review and preparation of plans and specifications.

#### Bull Run Filtration Pipelines Project, City of Portland Water Bureau, Multnomah and Clackamas Counties, OR (2020-Present)

Wolfe is the geotechnical and seismic design lead for the Raw Water Pipeline of this project. The project includes designing two large diameter (72-inch conduit) pipelines with a deep tunnel section and shaft, connecting interties, and associated appurtenances and structures that will supply water to the Bull Run Filtration Facility. Geotechnical evaluations include seismic evaluation, excavation support system evaluation for the deep shaft, tunnel evaluation and design, groundwater control and rock excavation assessment, and preparation of plans and specifications.



4800 SW Griffith Drive, Suite 128  
Beaverton, OR 97005  
(971) 405-6331  
kellerassociates.com

Date: 24 May 2024

Subject: RFP # SDWRP 03-24, Engineering Services for the Alder Creek Water Treatment Plant Upgrades

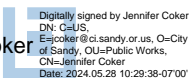
**NOTICE IS HEREBY GIVEN**, based on a review of proposals and the two proposers pursuant to the above referenced Request for Proposals and based on the scoring results from the City’s evaluation committee, the City of Sandy intends to award the contract for this procurement to **Keller Associates**. A summary of scores for submitted proposals and conducted interviews are included below:

Proposer	Proposal Score (out of 100 Points)
Keller Associates	87
Black & Veatch/Windsor	73.25

A proposer may submit a formal written protest of this Intent to Award within seven (7) calendar days of the date of this notice. The written protest must specify the grounds upon which the protest is based. For the protest to be considered valid, it must show that the protesting party is an adversely affected or aggrieved bidder as described in OAR 137-048-0240. Such protest must be submitted to the Deputy City Manager, Jeff Aprati, 39250 Pioneer Blvd., Sandy, OR 97055. Any protest received after this deadline will not be considered.

The City would like to extend its gratitude to both consultants that responded to RFP # SDWRP 03-24, demonstrating their qualifications and interest in working with the City to design this project. If you have any questions, pertaining to this notice, please feel free to contact us.

Respectfully,

Jennifer Coker   
Digitally signed by Jennifer Coker  
DN: cn=US,  
E=jcoker@ci.sandy.or.us, O=City  
of Sandy, OU=Public Works,  
CN=Jennifer Coker  
Date: 2024.05.28 10:29:38-07'00'

Jennifer Coker, PE  
Public Works Director  
City of Sandy

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**Meeting Type:** City Council  
**Meeting Date:** October 7, 2024  
**From:** Jeff Aprati, Deputy City Manager  
**Subject:** Review of Applications for Appointment to Vacant City Council Seat #5

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### DECISION TO BE MADE:

Review applications for appointment to vacant City Council Seat #5; determine which applicants to interview on October 21, 2024.

### BACKGROUND / CONTEXT:

The City Council declared Seat #5 vacant at the [September 3, 2024 meeting](#), and [adopted a process](#) to fill the seat. Pursuant to the City Charter all registered voters who have resided within city limits for at least a year were eligible to apply for the position, which will be filled by majority vote of the City Council.

The vacancy was advertised widely on the City's website, on social media, and in the City's e-newsletter. Five applications were received before the deadline of September 25<sup>th</sup>. Staff have verified that all five applicants meet the eligibility requirements. The applicants are (in alphabetical order):

- Patrick Bernards
- David Brems
- Lindy Hanley
- Michael Thompson
- Brandon Zawaski

### KEY CONSIDERATIONS / ANALYSIS:

Per the adopted process, City Council interviews of selected applicants will take place at the October 21, 2024 council meeting. The Council may choose to advance all five applicants to the interview stage, or the Council may choose to advance only certain applicants.

Application materials from all five individuals are attached for the Council's review. Applicants were asked to answer the following questions:

- INTEREST STATEMENT: Why are you interested in serving on the City Council?
- SKILLS: What skills, interest, or experience do you possess that you believe would bring value to the City Council?



- **EMPLOYMENT:** Please describe your employment history, especially as it may relate to serving in this position.
- **PREVIOUS GOVERNMENT EXPERIENCE:** Please list all previous experience relating to local, regional, or state government advisory boards, committees, or commissions.
- **VISION:** Please describe your vision for Sandy over the next 10, 20, 30 years. What are the most important opportunities our city needs to take advantage of?
- **CHALLENGES:** What are the biggest challenges facing Sandy over the next few decades, and what are some of your ideas on how to address those challenges?
- **COMMITMENT:** Can you commit to attending all regular City Council meetings and special meetings (including Budget Committee) during your appointment (at least 2-3 evening meetings a month) or providing timely notice in the event of an occasional absence?

### Evaluation Criteria

The adopted vacancy process included evaluation criteria for the Council's use in reviewing applications. The evaluation criteria are:

- Amount of prior local government experience/service
- Relevant skills and experience
- Knowledge and understanding of current City projects and initiatives
- Alignment with City needs, goals, and priorities
- Availability and time commitment

A formal point scoring or similar system has not been provided. The Council retains discretion in making this decision, and can apply the evaluation criteria as the Council deems appropriate.

### **RECOMMENDATION:**

Review the application materials per the adopted evaluation criteria, and determine which applicants will be invited to interview before the City Council on October 21<sup>st</sup>.

### **SUGGESTED MOTION LANGUAGE:**

"I move to advance (Applicant 1, Applicant 2, Applicant 3...) to the interview stage of the City Council vacancy process, to take place on October 21, 2024."

### **LIST OF ATTACHMENTS / EXHIBITS:**

- Application materials

**Application for Appointment to the Sandy City Council**

Applications due: 4:00 p.m. September 25, 2024 at Sandy City Hall

Date: 9/24/2024

Name: Patrick Bernards

Home Address: ~~11041~~ Hood Court, Sandy, OR 97055 17124 Hood Ct

Mailing Address (if different): \_\_\_\_\_

Phone: [REDACTED]

Email: [REDACTED]



1. Are you a registered voter in the State of Oregon? Yes  No

2. How long have you been a resident of Sandy?  
(Applicant must have resided within Sandy city limits continuously for at least 12 months preceding the appointment; since at least October 21, 2023)  
Month May Year 2018

3. Please list 3 personal or professional references who are not current City Council Members:

Name	Phone	Address
a. <u>Brett Hyland</u>	<u>[REDACTED]</u>	<u>Portland, OR</u>
b. <u>Jim Griffin</u>	<u>[REDACTED]</u>	<u>Sandy, OR</u>
c. <u>Ben Jones</u>	<u>[REDACTED]</u>	<u>Beaverton, OR</u>

4. INTEREST STATEMENT: Why are you interested in serving on the City Council?  
My wife and I moved to Sandy just over 6 years ago after spending most of our lives (separate and together) living on the westside of Portland. Both my wife and I have fond memories of our drives through Sandy on our way to Mt. Hood for Skiing. In our minds Sandy was always this quaint, mountain community so when we looked to move it was high on our list of options for our new life together. As luck would have it, we found the perfect home in Sandy and made it our home maybe our forever home. Now, 6 years later, I find that, while there are many things we love about Sandy, there are many things we wish were different. Instead of sitting on the sidelines and complaining about these things I thought I should get involved in helping find solutions. While not the only way, becoming a member of the Sandy City Council seemed the best way for me to make a difference in our small community. In my mind, that difference comes in two main ways. First, being an agent for change for those things the community would like to improve. Second, being an agent for preservation; preservation of those things we as community hold dear.

5. SKILLS: What skills, interest, or experience do you possess that you believe would bring value to the City Council?

- Goals, objectives and strategy setting
- Brand development and marketing
- Product Development (a product can be a city)
- Project Management
- Sales/Business Development (keeping in mind that sometimes all you need to sell is an idea)

**6. EMPLOYMENT:** Please describe your employment history, especially as it may relate to serving in this position.

- Director of Operations, Five x Five Solutions, Denver, CO (2021 to 2023)
- VP, Product Development & Director of Business Development, Mirth Provisions, Inc., Longview, WA (2016 to 2021)
- Director, Sales & Marketing, Bull Run Distilling Company, Portland, OR (2010 to 2016)
- Director, Business Development & Multi-Channel Marketing, Vertis Communications (acquired by Quad/Graphics), Baltimore, MD (2008 to 2009)

**7. PREVIOUS GOVERNMENT EXPERIENCE:** Please list all previous experience relating to local, regional, or state government advisory boards, committees, or commissions.

- As the President of the Oregon Distillers Guild, I actively lobbied in Salem to change rules and regulations that responsibly spurred growth for our industry.
- As a founding member of the American Craft Spirits Association, I worked on a national level to help change rules and regulations that responsibly spurred growth for our industry.

**8. VISION:** Please describe your vision for Sandy over the next 10, 20, 30 years. What are the most important opportunities our city needs to take advantage of?

- My vision for Sandy, based on what I know today, would be fairly consistent over the next 30 years, and it focuses on 4 areas. Specifically:
  - o Optimizing what we have. For example, there are far too many vacant building in Sandy and our mix of shops and restaurants is lacking. I believe Optimizing what we already have before growing is essential to our city's long-term success.
  - o Controlled growth. I believe if you don't grow you stagnate and eventually die. Sandy needs to grow, but that growth needs to be measured and it needs to come after we've optimized what we already have.
  - o Building the brand Sandy, Oregon. In simple terms, this equates to creation of a destination mountain community, not unlike Sisters, Oregon.
  - o Traffic Management. This is closely tied to the 3 previous points. I believe we have a serious traffic issue in Sandy and it's only going to get worse if we don't address it. Admittedly I don't know all of the ins and outs of traffic management, but I have to believe there are some relatively simple things we can start doing almost immediately. I at least believe we should try.

**9. CHALLENGES:** What are the biggest challenges facing Sandy over the next few decades, and what are some of your ideas on how to address those challenges?

If we want Sandy to be all it can be, at a minimum I believe the following areas must be addressed.

1. Downtown corridor vacancies and business mix
2. Growth management
3. The Sandy brand/image
4. Traffic



10. COMMITMENT: Can you commit to attending all regular City Council meetings and special meetings (including Budget Committee) during your appointment (at least 2-3 evening meetings a month) or providing timely notice in the event of an occasional absence?

- This is the one area that gives me pause in joining the city council. I am recently retired so I have lots of free time on my hand to attend meetings and work on assigned projects. This noted, my wife, Katy, works for the airline industry and travel is high on our priority list. We (the Sandy City Council and I) would need to discuss this point in greater detail to ensure I can meet the demands. If not, I will look to support the community in other ways.

---

**ACKNOWLEDGEMENT**

I acknowledge that no compensation will be paid by the City in connection with the services described herein. But if appointed I may receive reimbursement for eligible expenses.

I authorize the City to contact the listed references and any other contacts as may be necessary through those contacts, I release from liability my references for anything they may say about me.

I affirm that I am a registered voter in the State of Oregon, and that I have lived within Sandy city limits continuously since at least October 21, 2023. I understand that should either of the above points be demonstrated to be untrue, my application will be rejected by the City.

I understand that I may be required to verify any information provided in this application and I specifically declare that the information provided herein is true and accurate and I have not withheld or misstated any information relative to this application.

I understand that any misrepresentation or omission, as well as any misleading statements or omissions in this application, and in any related attachments, may result in my being considered ineligible for the position to which I have applied.

By signing this application voluntarily, I hereby acknowledge that I have read, understand, and agree to the terms and requirements as listed herein. I also understand that upon signing, this document will become a public record, will be reviewed by the City Council, and provided to the general public as part of a regular City Council Agenda packet. I agree to make myself available to be interviewed by the City Council at the regular City Council meeting to be held on October 21, 2024.

  
Applicant Signature

7/22/2024  
Date

**Return this application to the City Recorder by 4:00 p.m. on September 25, 2024 via hand delivery to Sandy City Hall, 39250 Pioneer Blvd. Sandy OR, 97055. When you submit your application, please bring your state-issued photo ID.**



**Application for Appointment to the Sandy City Council**

Applications due: 4:00 p.m. September 25, 2024 at Sandy City Hall

Date: 09/06/2024

Name: David E Breames

Home Address: 18734 Van Fleet Ave Sandy OR 97055

Mailing Address (if different): \_\_\_\_\_

Phone: [REDACTED]

Email: [REDACTED]

**RECEIVED**  
SEP 24 2024  
City of Sandy

1. Are you a registered voter in the State of Oregon? Yes  No

2. How long have you been a resident of Sandy?  
(Applicant must have resided within Sandy city limits continuously for at least 12 months preceding the appointment; since at least October 21, 2023)  
Month 06 Year 2008

3. Please list 3 personal or professional references who are not current City Council Members:

Name	Phone	Address
a. <u>Timothy Chesnut</u>	<u>[REDACTED]</u>	<u>Sandy OR</u>
b. <u>Khrys Jones</u>	<u>[REDACTED]</u>	<u>Sandy OR</u>
c. <u>Machel Heldstab</u>	<u>[REDACTED]</u>	<u>Sandy OR</u>

4. INTEREST STATEMENT: Why are you interested in serving on the City Council?

I have lived in this city since childhood and returned as an adult in 2008. I have raised both of my children here since birth and have actively served on the Parks and Recreation Committee. The decisions made in our city impact every aspect of my family's life, and I would like to have a voice in shaping those decisions. I own and operate my own company, and I have provided security for the beer garden at the Sandy Mountain Festival for four consecutive years. Currently, I employ four other residents of Sandy.

5. SKILLS: What skills, interest, or experience do you possess that you believe would bring value to the City Council?

I own a successful small business, where I have had to make difficult decisions to ensure its sustainability, particularly during the challenges of COVID-19. This experience has taught me the importance of respectful communication, even with those whose opinions differ from my own, as well as the value of advocating for my ideas with respect and professionalism. I currently serve on the Sandy Parks and Recreation Committee.

**6. EMPLOYMENT:** Please describe your employment history, especially as it may relate to serving in this position.

I have owned my own security company since 2007, and we recently underwent significant expansion by adding a Private Investigations branch, as well as establishing operations in Washington State. I also hold an associate degree in Business Administration from Mt. Hood Community College.

**7. PREVIOUS GOVERNMENT EXPERIENCE:** Please list all previous experience relating to local, regional, or state government advisory boards, committees, or commissions.

I have been an active member of the Sandy Parks and Recreation Committee.

**8. VISION:** Please describe your vision for Sandy over the next 10, 20, 30 years. What are the most important opportunities our city needs to take advantage of?

Sandy is experiencing rapid growth, and while sustainable development is essential, it's equally important to preserve our neighborhood charm and small-town atmosphere. We must ensure that our infrastructure can effectively accommodate this growth at every stage. Additionally, maintaining a diverse mix of business and leisure activities for all ages should remain a top priority.

**9. CHALLENGES:** What are the biggest challenges facing Sandy over the next few decades, and what are some of your ideas on how to address those challenges?

Addressing traffic control and congestion in conjunction with a sports complex not governed by the school district is essential for maintaining the safety and livability of our neighborhoods. Additionally, it is crucial to ensure that our emergency services are adequately funded to keep pace with our community's growth.

10. COMMITMENT: Can you commit to attending all regular City Council meetings and special meetings (including Budget Committee) during your appointment (at least 2-3 evening meetings a month) or providing timely notice in the event of an occasional absence?

Having control over my own schedule provides me with the flexibility and autonomy to make myself available as needed.

---

## ACKNOWLEDGEMENT

I acknowledge that no compensation will be paid by the City in connection with the services described herein. But if appointed I may receive reimbursement for eligible expenses.

I authorize the City to contact the listed references and any other contacts as may be necessary through those contacts, I release from liability my references for anything they may say about me.

I affirm that I am a registered voter in the State of Oregon, and that I have lived within Sandy city limits continuously since at least October 21, 2023. I understand that should either of the above points be demonstrated to be untrue, my application will be rejected by the City.

I understand that I may be required to verify any information provided in this application and I specifically declare that the information provided herein is true and accurate and I have not withheld or misstated any information relative to this application.

I understand that any misrepresentation or omission, as well as any misleading statements or omissions in this application, and in any related attachments, may result in my being considered ineligible for the position to which I have applied.

By signing this application voluntarily, I hereby acknowledge that I have read, understand, and agree to the terms and requirements as listed herein. I also understand that upon signing, this document will become a public record, will be reviewed by the City Council, and provided to the general public as part of a regular City Council Agenda packet. I agree to make myself available to be interviewed by the City Council at the regular City Council meeting to be held on October 21, 2024.

David Breames  
Applicant Signature

09/06/2024  
Date

**Return this application to the City Recorder by 4:00 p.m. on September 25, 2024 via hand delivery to Sandy City Hall, 39250 Pioneer Blvd. Sandy OR, 97055. When you submit your application, please bring your state-issued photo ID.**

**Application for Appointment to the Sandy City Council**

Applications due: 4:00 p.m. September 25, 2024 at Sandy City Hall

Date: 9/24/2024

Name: Lindy Call Hanley

Home Address: 39224 Pleasant Street, Sandy, OR 97055

Mailing Address (if different): \_\_\_\_\_

Phone: [REDACTED]

Email: [REDACTED]



1. Are you a registered voter in the State of Oregon? Yes  No

2. How long have you been a resident of Sandy?  
(Applicant must have resided within Sandy city limits continuously for at least 12 months preceding the appointment; since at least October 21, 2023)

Month 7 Year 2018 (2010-2014)

3. Please list 3 personal or professional references who are not current City Council Members:

Name	Phone	Address
a. <u>Dennis Lane</u>	<u>[REDACTED]</u>	<u>[REDACTED] Sandy, OR 97055</u>
b. <u>Amanda Mason</u>	<u>[REDACTED]</u>	<u>[REDACTED] Sandy, OR 97055</u>
c. <u>Rae Patterson</u>	<u>[REDACTED]</u>	<u>[REDACTED] Yavaka, New Zealand 9305</u>

4. INTEREST STATEMENT: Why are you interested in serving on the City Council?

Please see attached.

5. SKILLS: What skills, interest, or experience do you possess that you believe would bring value to the City Council?

Please see attached.



6. **EMPLOYMENT:** Please describe your employment history, especially as it may relate to serving in this position.

Please see attached.

7. **PREVIOUS GOVERNMENT EXPERIENCE:** Please list all previous experience relating to local, regional, or state government advisory boards, committees, or commissions.

Please see attached.

8. **VISION:** Please describe your vision for Sandy over the next 10, 20, 30 years. What are the most important opportunities our city needs to take advantage of?

Please see attached.

9. **CHALLENGES:** What are the biggest challenges facing Sandy over the next few decades, and what are some of your ideas on how to address those challenges?

Please see attached.

10. COMMITMENT: Can you commit to attending all regular City Council meetings and special meetings (including Budget Committee) during your appointment (at least 2-3 evening meetings a month) or providing timely notice in the event of an occasional absence?

Absolutely.

---

**ACKNOWLEDGEMENT**

I acknowledge that no compensation will be paid by the City in connection with the services described herein. But if appointed I may receive reimbursement for eligible expenses.

I authorize the City to contact the listed references and any other contacts as may be necessary through those contacts, I release from liability my references for anything they may say about me.

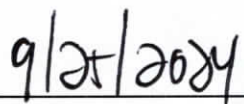
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Applicant Signature

  
Date

**Return this application to the City Recorder by 4:00 p.m. on September 25, 2024 via hand delivery to Sandy City Hall, 39250 Pioneer Blvd. Sandy OR, 97055. When you submit your application, please bring your state-issued photo ID.**

#### 4. INTEREST STATEMENT: *Why are you interested in serving on the City Council?*

Growth and change lead to shifting priorities. Preserving Sandy's extensive history, promoting community engagement, increasing community literacy, boosting safety and tourism, and having a clear plan for the future are at the forefront of my concerns. Fiscal responsibility is key. Losing the pool was tough on everyone, that's where my now Sandy High varsity swimmer and her little sister learned to swim, but sometimes the tough decisions must be made. Prioritizing the new wastewater and water treatment projects isn't glamorous, but planning for and providing for our city's future is necessary. Nobody throws a parade for city counselors, it is definitely a thankless position, but it is too important to leave to the casually involved, or to those only informed by rumors or Facebook.

In 2009 my husband, 2-week-old daughter, and I moved to the mountain for an employment opportunity. After finding a spider on my toothbrush, we made the move to the sunny side of the street, Sandy. In 2010 we built our first home in the Timberline Trails neighborhood, and we welcomed our youngest daughter in 2011. While I was volunteering extensively, helping to run my church's youth program and at Sandy Grade, my husband was traveling extensively. The community was a refuge for a young mother with two small kids. The parks, the library, the Christmas tree farms, the community programming and events, the connection to its pioneering past, and the proximity to year-round skiing and surfing, provided an ideal place to raise our girls.

After a 3-year stint in New Zealand, filled with incredible experience and yes, volunteering, we chose to return to Sandy. We could not believe the growth Sandy had experienced in those short years. Though it was built before we left, the beautiful new high school now felt relevant to our growing girls, there were food trucks and a wider selection of restaurants; Sandy style had officially taken hold, and the downtown area seemed fresh and inviting. The decision to move back was easy to make. After renting for a year, we bought a historic home in the heart of Sandy's urban renewal district, and I spent 2 years restoring and preserving its details. We were once again embraced by this community and I found myself volunteering at the grade school, within the school district, at my local church in the women's program, and eventually running my church's female youth program. Most recently I've served on OTSD's Leadership Council, OTSD's Budget Committee and now work in the libraries at Boring Middle and Cedar Ridge Middle.

The challenges facing our city are matched only by the passion of those tasked with making its decisions. Each time I sit in a city council meeting, or read the minutes of a committee meeting, I'm impressed by the breadth of knowledge of Sandy's mayor and city counselors and am reminded that each decision affects Sandy's citizens. Delving into complex issues has been a mainstay of my volunteer and employment experience and I welcome the opportunity to learn, process, and apply. As someone who has chosen this city twice, I would love the chance to continue the legacy of great counselors to ensure Sandy remains a place where my girls would like to raise their families. I would be honored to serve the people of Sandy as one of its city counselors.

5. SKILLS: *What skills, interest, or experience do you possess that you believe would bring value to the City Council?*

I have the ability to listen, work, and disagree without being disagreeable. I am a quick learner, able to ask questions and help build a consensus. I have the time and am willing to utilize it to read, research, ask questions, and ultimately understand the city department programs, projects, funding strategies, and needs. I have a knack for engaging community members and enlisting volunteers and I am able to consider the needs of our diverse community when considering policy.

I have a Bachelor of Arts in History from the University of Utah and have a passion for sharing and preserving history. In 2021 I spearheaded Sandy Grade's 90 Years Celebration, collaborating with Sandy's Historical Society, former students and administrators, and other volunteers. Some of Sandy's historic buildings are on the verge of falling victim to disrepair. I know first-hand the time, energy, and money it takes to preserve these treasures and would love to explore ways to enlist county, state, and national funding to protect these and other physical reminders of Sandy's history.

As a current middle school librarian, library and community literacy is another interest that is close to my heart. Creative solutions, such as the Sandy Library's bookmobile project, create access for our most vulnerable citizens. More collaboration between the Sandy and Hoodland libraries and local school libraries could go a long way to increase information fluency and literacy engagement throughout our community.



6. EMPLOYMENT: *Please describe your employment history, especially as it may relate to serving in this position.*

2022-current: Oregon Trail School District, Sandy, Oregon - Library Tech: Collaborate with students, teachers, media specialists, and other techs to promote community literacy through oral presentations, displays, contests, and reading challenges. This experience helps me understand the importance of our Sandy/Boring and Hoodland Libraries to the community as well as the needs of our community youth.

2019-2020, 2022: Oregon Trail School District, Sandy Oregon - Classified Substitute: Filled-in for absent grade school support staff in the office, common spaces, and classrooms during Covid-fueled staffing shortages. This experience helped me excel at thinking on my feet in uncharted waters.

2017: Wanaka Playgroup, Wanaka, New Zealand (council-supported community playgroup) - Playgroup Coordinator: Planned and shared bi-weekly songs, art, stories, and snacks for parents and toddlers while adhering to Māori language/cultural requirements. I learned the importance of respecting the historic cultures of our city's residents, that inclusivity matters, and to balance expectations with deliverables.

2007-2008: Terry Hurt Interior Design, Truckee, California (interior design firm) - Design Administrator and Office Manager: Designed for residential clients in tourist communities. Billing, accounting, marketing, and vendor/product research. I gained insights into tourist-based economies, balancing the needs of our city's residents vs. the need of visitors.

2006-2007: Cefn Hengoed Community School, Swansea, Wales, U.K. (11-16 comprehensive school) - Examination Invigilator or proctor: Oversaw and supervised national examinations while adhering to and enforcing exacting processes. I learned the importance of implementing government policy to an exacting standard, the needs for reliable and affordable public transportation (3-bus commute to work), and being mindful of vulnerable populations.

7. PREVIOUS GOVERNMENT EXPERIENCE: *Please list all previous experience relating to local, regional, or state government advisory boards, committees, or commissions.*

2019-2022 OTSD Superintendent's Leadership Council, Sandy, Oregon: In monthly meetings with the superintendent, provided opinions, perspectives, clarified information, and liaised with school administration. This experience gave me an ability to consider policies and programs at a strategic level and will allow me to provide insights to our City Council and City Manager.

2020-2021 OTSD Budget Committee, Sandy, Oregon: Attended trainings and meetings, researched and asked enough questions to understand and have an informed opinion on complicated spreadsheets and budgeting procedures. This experience helped me understand the complexity of different departments providing services, city tax revenue, grants, partnerships, intergovernmental agreements, and other funding strategies that Sandy has, to ensure we can deliver city services effectively and efficiently.

2020-2022 Sandy Grade School Volunteer Coordinator, Sandy, Oregon: Created, collaborated with Sandy's Historical Society, and gathered volunteers for Sandy Grade's 90 Years celebration; solicited donations, organized volunteers and logistics for jog-a-thon fundraisers (including a Covid-constrained virtual jog-a-thon); solicited sponsors and donations, and organized logistics and volunteers for field days and other end-of-year celebrations. These experiences helped me understand the importance of partnerships, logistics, and flexibility when organizing, fundraising and staging community events, especially during an unprecedented pandemic.

2016-2018 Aspiring Gymsports Committee Member, Wanaka, New Zealand (non-profit competitive gymnastics club): Participated in quarterly committee meetings and yearly budget meetings; assisted in grant-writing process for equipment and new premises; created and organized volunteers, judges, and athletes for a multi-club gymnastics competition fundraiser; solicited donations for equipment and uniforms, acquired sponsorships for tracksuits; ordered specialized equipment and organized international delivery, created and organized volunteers for movie night fundraisers and various sausage sizzles; provided administration for 100+ members of the gymnastics club. This experience gave me insights into grants and other funding processes, complicated bureaucracy, exacting procedures and filing deadlines, and the importance of community involvement.

8. VISION: *Please describe your vision for Sandy over the next 10, 20, 30 years. What are the most important opportunities our city needs to take advantage of?*

The City of Sandy offers residents of all ages the ability to grow up in Sandy, find employment in or near Sandy, raise a family, retire, and enjoy all the amenities Sandy can offer over those life stages. All cities offer water, sewer, and roads. Our city should ensure that our staff and other service partners provide recreational amenities, neighborhood safety, a vibrant business sector, and lively opportunities for community to gather and become involved. I look forward to working with city council, city staff, and engaging my fellow community members to develop and refine those opportunities to enhance Sandy's future.

I hope I can help bring Sandy's storied history to our walkable, safe downtown, our trail systems, and our community events. By utilizing more public art, more historic markers, and partnering with Sandy's Historical Society and Parks and Recreation Department, Sandy's indigenous and pioneer heritage and history can become even more of a centerpiece and economic driver of our town. Cities like Silverton and Oregon City have capitalized on their history, improving their community identity, and increased tourism as a result.

9. CHALLENGES: *What are the biggest challenges facing Sandy over the next few decades, and what are some of your ideas on how to address those challenges?*

The biggest challenge to our city over the next few decades is obviously infrastructure. Finding ways to pay for our infrastructure needs without passing the bulk of the costs onto Sandy's citizens should be at the forefront of every discussion. Controlled, self-sustaining, intentional growth is the only option to ensure our infrastructure keeps up with our growth.

Messaging is another serious challenge. Rumors in community Facebook groups and other op-eds are not appropriate places to get facts about issues facing our city, but they are the most prolific. Creating easier to access, easier to understand informational graphics or one-pagers with links to the more significant information that could be shared on social media could have an impact on untrue storylines being passed around our community.

Losing our historic sites and buildings is another significant challenge. Connecting Sandy's history to the indigenous, pioneer and Mt. Hood National Forest history that surrounds us, would help highlight educational, economic and tourism opportunities. Exploring opportunities for county, state, and national grants could help protect aging buildings and help focus community members and tourists to these distinctive assets.



**Application for Appointment to the Sandy City Council**  
Applications due: 4:00 p.m. September 25, 2024 at Sandy City Hall

Date: 11 September, 2024

Name: Michael Denis Thompson

Home Address: 19393 Oak Ave Sandy, Oregon 97055

Mailing Address (if different): \_\_\_\_\_

Phone: [REDACTED]

Email: [REDACTED]

RECEIVED  
SEP 21 2024

RECEIVED  
SEP 12 2024  
*Djyme*

City of Sandy

1. Are you a registered voter in the State of Oregon? Yes XX No \_\_\_\_\_

2. How long have you been a resident of Sandy?  
(Applicant must have resided within Sandy city limits continuously for at least 12 months preceding the appointment; since at least October 21, 2023)  
Month 10 Year 2017

3. Please list 3 personal or professional references who are not current City Council Members:

Name	Phone	Address
a. <u>Ross Smith</u>	<u>[REDACTED]</u>	<u>[REDACTED] Sandy, Oregon</u>
b. <u>Marlene Rattray</u>	<u>[REDACTED]</u>	<u>[REDACTED] Sandy, Oregon</u>
c. <u>Russell Hokanson</u>	<u>[REDACTED]</u>	<u>[REDACTED] Sandy, Oregon</u>

4. INTEREST STATEMENT: Why are you interested in serving on the City Council?  
Since moving to Sandy in 2017 my wife and I have appreciated and enjoyed Sandy as a "small town" where we feel safe and comfortable. I would like to assist in maintaining Sandy as a desirable place to live and raise a family. I have no desire to become a politician, only to help recognize and identify problems and use common sense to propose solutions.

5. SKILLS: What skills, interest, or experience do you possess that you believe would bring value to the City Council?  
Since moving to Sandy in 2017 my wife and I have appreciated and enjoyed Sandy as a "small town" where we feel safe and comfortable. I would like to assist in maintaining Sandy as a desirable place to live and raise a family. I have no aspirations to become involved as a politician, only to help recognize and identify problems and use common sense to propose solutions.

In my professional experience I have been responsible for developing capital expansion budgets of about \$1,000,000 annually and then overseeing the implementation of the budgets. I have had the responsibility of preparing preventative maintenance plans and supervising the maintenance departments in following these plans. In developing these capital budgets, I had the responsibility of working with local jurisdictions in determining what permits would be required and how to best obtain the required permits and inspections.

**6. EMPLOYMENT:** Please describe your employment history, especially as it may relate to serving in this position.

Following school, I started in mechanical engineering as a detail draftsman working for a subcontractor at the Nevada Nuclear Test Site leaving there as a Design Checker. I then worked as piping designer completing the piping design at Trojan Nuclear Power Plant in Ranier, Oregon. At the completion of Trojan, I worked for FMC completing the piping design for ocean going oil tankers for Chevron Shipping and after completion of the piping design I was a test engineer on these ships. As a test engineer I had to verify that various systems were fabricated correctly and then demonstrate that they functioned as intended.

I then worked for an aluminum wire and cable manufacturer where I was the Corporate Engineer having responsibility for plants in New York, California, Washington and Venezuela.

All of these positions required me to become a problem solver and to work effectively with others in finding and implementing solutions.

**7. PREVIOUS GOVERNMENT EXPERIENCE:** Please list all previous experience relating to local, regional, or state government advisory boards, committees, or commissions.

Chairman of the Madison High School Advisory Board Budget Committee in Portland, Oregon

**8. VISION:** Please describe your vision for Sandy over the next 10, 20, 30 years. What are the most important opportunities our city needs to take advantage of?

Sandy, in my opinion, needs to maintain a "small town" feel and yet provide "large town" opportunities for growth and development. All plans and proposals need to be viewed, looking at what the consequences of those plans will be in 10, 20, or more years in the future. Plans should not be prepared using a "top down" approach but should be prepared by all stake holders in open dialog with a consensus approval approach.

The opportunities are the people of Sandy and they need to be involved in determining the future of Sandy.

**9. CHALLENGES:** What are the biggest challenges facing Sandy over the next few decades, and what are some of your ideas on how to address those challenges?

In my opinion there will be two major problems to be faced in the future.

First the plans for future growth must be weighed with the ability of the city to provide the required services, that would be safety (police and fire), water, sewage, and municipal transportation.

Second homelessness will be a continuing problem for the foreseeable future. This is a complex issue with a multitude of stakeholders involved that will have to work together to fashion the best possible solution. Some, if not most, of the root causes are outside of the responsibility of the city to solve, but the city should be involved in offering potential solutions to those who do have the responsibility and resources to help. It will be difficult to address the local problem without solving the root causes first.



10. COMMITMENT: Can you commit to attending all regular City Council meetings and special meetings (including Budget Committee) during your appointment (at least 2-3 evening meetings a month) or providing timely notice in the event of an occasional absence? I have the time and availability to attend all of the meetings. It is my intent to be actively involved if I am given the opportunity.

**ACKNOWLEDGEMENT**

I acknowledge that no compensation will be paid by the City in connection with the services described herein. But if appointed I may receive reimbursement for eligible expenses.

I authorize the City to contact the listed references and any other contacts as may be necessary through those contacts, I release from liability my references for anything they may say about me.

I affirm that I am a registered voter in the State of Oregon, and that I have lived within Sandy city limits continuously since at least October 21, 2023. I understand that should either of the above points be demonstrated to be untrue, my application will be rejected by the City.

I understand that I may be required to verify any information provided in this application and I specifically declare that the information provided herein is true and accurate and I have not withheld or misstated any information relative to this application.

I understand that any misrepresentation or omission, as well as any misleading statements or omissions in this application, and in any related attachments, may result in my being considered ineligible for the position to which I have applied.

By signing this application voluntarily, I hereby acknowledge that I have read, understand, and agree to the terms and requirements as listed herein. I also understand that upon signing, this document will become a public record, will be reviewed by the City Council, and provided to the general public as part of a regular City Council Agenda packet. I agree to make myself available to be interviewed by the City Council at the regular City Council meeting to be held on October 21, 2024.

Michael Thompson  
Applicant Signature

12 SEP 24  
Date

**Return this application to the City Recorder by 4:00 p.m. on September 25, 2024 via hand delivery to Sandy City Hall, 39250 Pioneer Blvd. Sandy OR, 97055. When you submit your application, please bring your state-issued photo ID.**

**Application for Appointment to the Sandy City Council**  
Applications due: 4:00 p.m. September 25, 2024 at Sandy City Hall

Date: 9/5/2024

Name: Brandon Zawaski

Home Address: 15713 Jade Glen Ave

Mailing Address (if different): \_\_\_\_\_

Phone: [REDACTED]

Email: [REDACTED]

1. Are you a registered voter in the State of Oregon? Yes  No

2. How long have you been a resident of Sandy?

(Applicant must have resided within Sandy city limits continuously for at least 12 months preceding the appointment; since at least October 21, 2023)

Month January Year 2018

3. Please list 3 personal or professional references who are not current City Council Members:

Name	Phone	Address
a. <u>Luke Reid</u>	<u>[REDACTED]</u>	<u>[REDACTED]</u> Hillsboro, OR 97124
b. <u>Roger Thompson</u>	<u>[REDACTED]</u>	<u>[REDACTED]</u> Portland, OR 97201
c. <u>Dave Gix</u>	<u>[REDACTED]</u>	<u>[REDACTED]</u> Portland, OR 97236

4. INTEREST STATEMENT: Why are you interested in serving on the City Council?

I would like to join the city council to get more involved in my community, to serve in varying capacities and to contribute towards achieving the goals set forth by the council. Generally and without any bias I support the city's goals and that we have a long term vision for making and keeping Sandy a great place to work, play and thrive. I've seen how well the current council (including Carl who is leaving) listen to and take measured steps to address the concerns of Sandy's citizens. That has made me realize this is a great group and means for me to step up and contribute physically and mentally my talents towards the City of Sandy. I try to engage with other members of my community and think I would find serving on the council equally rewarding (for all.) I want to serve on the city council because I am excited about Sandy and where we are going as a community. There are not many places where families can say they let their kids play outside or that adults are able to take a quick drive and catch some fish-that is the heart of our community, a place where we thrive. And I plan to make sure we continue to thrive, be a looking at a municipal budget, putting an eye on infrastructure or even fielding feasibility studies on things we are doing down the road. I don't mind picking up the phone or a shovel when I have to, it's all part of getting the job done.

5. SKILLS: What skills, interest, or experience do you possess that you believe would bring value to the City Council?

I like to draw out various viewpoints, figure out the key issues and focus in on what needs to be done by a group. I try to be realistic and respectful both with time and available resources. If I think I need to get a hold of an expert in a certain area I would start by asking around, if somebody has any referrals for other things that are sought after. Something that can be challenging in a group of people is that not everybody thinks, operates or even plans the same way. We come from different walks of life. I've had volunteer and professional experiences where I've found myself getting person A to talk to person B and that is 50% of the battle, to start the critical conversations. I have worked quite a bit with state and local agencies on various licenses/property tax related matters and other compliance tasks that I feel will translate directly into the types of projects the council works on regularly. As an accountant I am very cost and people conscious, everybody has an end goal in mind but being able to communicate both technical and financial information to our stakeholders (citizens) is key to ensuring we are meeting and exceeding targets.



**6. EMPLOYMENT:** Please describe your employment history, especially as it may relate to serving in this position.

I am an accountant by profession (not a licensed CPA or grad) but work in a sales/use/property tax department on return prep, audit work, compliance tasks and maintaining a calendar for our small tax department. I have been with Radius Recycling, Inc (formerly Schnitzer Steel Industries, Inc) since June 2015. In that time I have not only done said functions above but have also been asked to help out the treasury department with tax payments and am a go-to person for direction, leadership, planning, feedback and execution to ensure the company meets it's goals both internally and externally. I also do bookkeeping for a church in Hillsboro Oregon, Way Church (assumed business name for Resound Church.) I helped plant the church in a movie theater in 2011 and we eventually bought two multi-million dollar pieces of real estate. Both Radius and Resound have undergone rebranding in the past year, like many others and have their own unique challenges to adapt to a changing business environment. I do not plan on leaving either position upon acceptance of this city council seat.

**7. PREVIOUS GOVERNMENT EXPERIENCE:** Please list all previous experience relating to local, regional, or state government advisory boards, committees, or commissions.

Some volunteer work, none directly.

**8. VISION:** Please describe your vision for Sandy over the next 10, 20, 30 years. What are the most important opportunities our city needs to take advantage of?

2020's: sources of funding for parks, municipal maintenance, growth, public services and community resources for citizens to engage. We should also try and get a major employer to locate in Sandy (retail would be fine but high tech would be ideal to maintain a well trained local workforce.)

2030: develop more housing, industrial parks, community centers, provide jobs and opportunities for our growing community. Attract a college to build in Sandy to keep high school graduates in Sandy post K-12

2040: urban renewal of downtown Sandy, urban transformation of certain surrounding residential areas that may need improvement, making Sandy a central shipping hub for major carriers

2050: work with state of Oregon on major infrastructure projects such as a "Sandy by-pass" road similar to Dundee

**9. CHALLENGES:** What are the biggest challenges facing Sandy over the next few decades, and what are some of your ideas on how to address those challenges?

Transportation, education, affordable housing, water, quality of the community and environment, accountability for major projects, being able to attract and maintain educated working professionals.

10. COMMITMENT: Can you commit to attending all regular City Council meetings and special meetings (including Budget Committee) during your appointment (at least 2-3 evening meetings a month) or providing timely notice in the event of an occasional absence?

Yes

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**ACKNOWLEDGEMENT**

I acknowledge that no compensation will be paid by the City in connection with the services described herein. But if appointed I may receive reimbursement for eligible expenses.

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*Brandon Zawaski*      *Brandon Zamani*

Applicant Signature

9/5/2024

Date

**Return this application to the City Recorder by 4:00 p.m. on September 25, 2024 via hand delivery to Sandy City Hall, 39250 Pioneer Blvd. Sandy OR, 97055. When you submit your application, please bring your state-issued photo ID.**