



TUALATIN CITY COUNCIL MEETING

Monday, December 09, 2024

TUALATIN CITY SERVICES
10699 SW HERMAN ROAD
TUALATIN, OR 97062

Mayor Frank Bubenik
Council President Valerie Pratt
Councilor Maria Reyes Councilor Bridget Brooks
Councilor Christen Sacco Councilor Cyndy Hillier
Councilor Octavio Gonzalez

To the extent possible, the public is encouraged to watch the meeting live on local cable channel 28, or on the City's website.

For those wishing to provide comment during the meeting, there is one opportunity on the agenda: Public Comment. Written statements may be sent in advance of the meeting to Deputy City Recorder Nicole Morris up until 4:30 pm on Monday, December 9. These statements will be included in the official meeting record, but not read during the meeting.

For those who would prefer to make verbal comment, there are two ways to do so: either by speaking in person or entering the meeting using the zoom link and writing your name in chat. As always, public comment is limited to three minutes per person.

Phone: +1 669 900 6833

Meeting ID: 861 2129 3664

Password: 18880

Link: <https://us02web.zoom.us/j/86121293664?pwd=SS9XZUZyT3FnMk5rbDVKN2pWbnZ6UT09>

Work Session

- 1. 5:00 p.m. (40 min) – 2025 Federal Legislative Agenda Preparation.** Tonight's presentation will include a recap, an update on the upcoming Oregon Legislative Session, and discussion of a 2025 Federal Legislative Agenda with the team from Thorn Run.
- 2. 5:40 p.m. (50 min) – Washington County Supportive Housing Services Annual Report and Discussion.** Representatives from Washington County will present the FY 23/24 Supportive Housing Services Annual Report. In addition, the new City/County Homelessness Liaison for Tigard, Tualatin, and Sherwood (funded by SHS dollars) will be introduced.
- 3. 6:30 p.m. (30 min) – Council Meeting Agenda Review, Communications & Roundtable.** Council will review the agenda for the December 9th City Council meeting, decide whether a discussion of changes to the existing Council Committee assignments is needed (if so, it

would be discussed at the January 13 Work Session), and brief the Council on issues of mutual interest.

7:00 P.M. CITY COUNCIL MEETING

Call to Order

Pledge of Allegiance

Announcements

1. New Employee Introduction- Police Officer Eduardo Urias

Public Comment

This section of the agenda allows anyone to address the Council regarding any issue not on the agenda, or to request to have an item removed from the consent agenda. The duration for each individual speaking is limited to 3 minutes. Matters requiring further investigation or detailed answers will be referred to City staff for follow-up and report at a future meeting.

Consent Agenda

The Consent Agenda will be enacted with one vote. The Mayor will ask Councilors if there is anyone who wishes to remove any item from the Consent Agenda for discussion and consideration. If you wish to request an item to be removed from the consent agenda you should do so during the Citizen Comment section of the agenda.

1. Consideration of Approval of the Work Session and Regular Meeting Minutes of November 25, 2024
2. Consideration of **Resolution No. 5821-24** Authorizing the City Manager to Apply for and Accept Community Development Block Grant Funds to Complete Facilities Enhancements at the Juanita Pohl Center
3. Consideration of **Resolution No. 5822-24** authorizing the City Manager to Accept the 2025 Ready to Read Grant from the State Library of Oregon
4. Consideration of **Resolution No. 5825-24** Accepting the System Development Charge Annual Reports for Fiscal Year 2023-24
5. Consideration of **Resolution No. 5827-24** Canvassing Results of the General Election Held in the City of Tualatin, Washington and Clackamas counties, Oregon on November 5, 2024

Special Reports

1. Inclusion, Diversity, Equity, and Access (IDEA) Advisory Committee Annual Report
2. Outside Agency Grant Awardee- The Foundation for Tigard Tualatin Schools

Public Hearings - Quasi-Judicial

1. Consideration of **Ordinance No. 1496-24** a Plan Map Amendment (PMA) to Rezone an 8.3-acre Site Located at 23370 SW Boones Ferry Road from Institutional (IN) to the Medium Low Density Residential (RML) Planning District

General Business

If you wish to speak on a general business item please fill out a Speaker Request Form and you will be called forward during the appropriate item. The duration for each individual speaking is limited to 3 minutes. Matters requiring further investigation or detailed answers will be referred to City staff for follow-up and report at a future meeting.

1. Consideration of **Ordinance No. 1497-24** Relating to Public Contracts; Increasing Certain Procurement Thresholds: and Amending TMC Chapter 12
2. Consideration of **Resolution No. 5823-24** Adopting the Updated City of Tualatin Financial Policies Manual

Items Removed from Consent Agenda

Items removed from the Consent Agenda will be discussed individually at this time. The Mayor may impose a time limit on speakers addressing these issues.

Council Communications

Adjournment

Meeting materials, including agendas, packets, public hearing and public comment guidelines, and Mayor and Councilor bios are available at www.tualatinoregon.gov/citycouncil.

Tualatin City Council meets are broadcast live, and recorded, by Tualatin Valley Community Television (TVCTV) Government Access Programming. For more information, contact TVCTV at 503.629.8534 or visit www.tvctv.org/tualatin.

In compliance with the Americans with Disabilities Act, this meeting location is accessible to persons with disabilities. To request accommodations, please contact the City Manager's Office at 503.691.3011 36 hours in advance of the meeting.



CITY OF TUALATIN

Staff Report

TO: Honorable Mayor and Members of the City Council

THROUGH: Sherilyn Lombos, City Manager

FROM: Megan George, Deputy City Manager

DATE: December 9, 2024

SUBJECT:
2025 Federal Legislative Agenda Preparation

EXECUTIVE SUMMARY:

On May 13, 2024, the City Council authorized the City Manager to execute a contract with Thorn Run Partners, LLC (“Thorn Run”) to provide government affairs and lobbying services for the City. Their scope of work includes activities at the State and Federal level including building relationships with legislators, facilitating development of project funding asks, and communicating progress with City staff and the City Council.

On July 29, 2024, and August 26, 2024, the City Council met with Thorn Run to learn more about their team, receive an overview of the legislative process at the State and Federal levels, discuss policy themes and priorities, and adopt a *2025 State Legislative Agenda*. In August, the City Council directed staff to return following the November 5, 2024, election with items to consider for a *2025 Federal Legislative Agenda*.

Tonight’s presentation will include a recap, an update on the upcoming Oregon Legislative Session, and discussion of a *2025 Federal Legislative Agenda*. To aid in the discussion, a draft of the agenda and accompanying discussion questions are included in the presentation.

OUTCOMES OF DECISION:

Staff will bring a resolution to the January 13, 2025, City Council Meeting for the City Council’s consideration and adoption.

Following adoption, Thorn Run’s team will share the agenda with Tualatin’s congressional delegation. They will provide regular communication on policy discussions and funding opportunities and identify opportunities for the City Council to engage on the agenda and other relevant discussions.

ATTACHMENTS:

- Presentation



CITY *of*
TUALATIN

Legislative Agenda Adoption



City Council | December 9, 2024

Today's Agenda

- Recap
- State Legislative Session Preview
- Federal Legislative Agenda Preparation



Agenda Adoption Process

- Special Work Session with Thorn Run and City Council in **July**
- Policy themes and priorities discussion and *State Legislative Agenda* adoption in **August**
- *Federal Legislative Agenda* discussion in **December**
- *Federal Legislative Agenda* adoption in **January**



Policy Themes

- Transportation
- Housing
- Social services
- Resiliency and emergency preparedness
- Environment
- Downtown revitalization
- Local control and unfunded mandates
- Capital Projects



2025 Legislative Agenda

State

Seismic Valving at Six Water Reservoirs - \$1.75 Million

The City seeks funding to retrofit all six of Tualatin's water reservoirs to include seismic valving.

Veteran's Plaza Shade Structure- \$250,000

The City seeks funding to install a shade structure at the new Veterans Plaza.

Electric Vehicle Chargers- \$4.7 Million

The City seeks funding to install 119 charging ports for electric vehicles on public property.



State Legislative Session Preview



Federal Legislative Agenda Preparation



2025 Legislative Agenda Draft

Federal

- 65th/Borland/Sagert Transportation Improvements Project - *\$3 Million*
- Increase Funding for Community Development Block Grant (CDBG) Program
- Continue Funding for Community Fueling Infrastructure (CFI) Program
- Continue Funding for Railroad Crossing Elimination (RCE) Program
- Protect Local Government's Ability to Offer Tax Exempt Municipal Bonds



Discussion Questions

- Is there anything on the list that shouldn't be?
- Is there anything missing from the list?
- What makes the items on the list important to Tualatin?





CITY OF TUALATIN

Staff Report

TO: Honorable Mayor and Members of the City Council

THROUGH: Sherilyn Lombos, City Manager

FROM: Megan George, Deputy City Manager

DATE: December 9, 2024

SUBJECT:
FY 2023-2024 Supportive Housing Services Annual Report

EXECUTIVE SUMMARY:

Washington County released their FY 2023-2024 Supportive Housing Services Annual Report on October 31, 2024. In the third year of implementation, over 10,000 people were served across outreach, shelter, housing placement, and eviction prevention programs. While state and national trends show upticks in homelessness, Washington County has achieved a 35.5% decline in unsheltered homelessness thanks to investments from the voter-approved Supportive Housing Services measure. Staff from Washington County's Department of Housing Services will present the report.

In addition, City staff will introduce our new City/County Homelessness Liaison Megan Cohen. The position is shared between Tigard, Tualatin, and Sherwood, and is funded by Supportive Housing Services funds from Washington County.

In May 2020, voters in greater Portland approved a new regional supportive housing services fund paid for by a personal income tax and a business income tax. Metro supportive housing services taxes went into effect in 2021 and are set to expire in 2030 unless extended by voters. While the revenue stream fluctuates, the goal is to raise \$250 million annually to help end homelessness across greater Portland.

ATTACHMENTS:

- Presentation
- Annual Report: <https://www.washingtoncountyor.gov/housing/documents/supportive-housing-services-fiscal-year-2023-24-annual-report/download?inline>

Department of Housing Services



Supportive Housing Services (SHS) Year 3 Annual Report

Nicole Stingh, Strategic Initiatives and Relations Manager

Jessi Adams, Strategic Projects Supervisor

December 9, 2024



Stories of Hope



Russell moved into long-term housing this year.

“Washington County has been very successful... It worked for me, and it’s working.”

Last year, we shared Russell’s story as he transitioned from an encampment to staying at a bridge shelter. ***Today, Russell lives in his own apartment thanks to SHS!***



Year 3 Annual Report Highlights

FY 2023-24



100%
SHS Budget
Spent

exceeding the
85% goal.



1,200+
People

moved into housing
through SHS-funded
programs.



10,400+
People

served through SHS-
funded services.

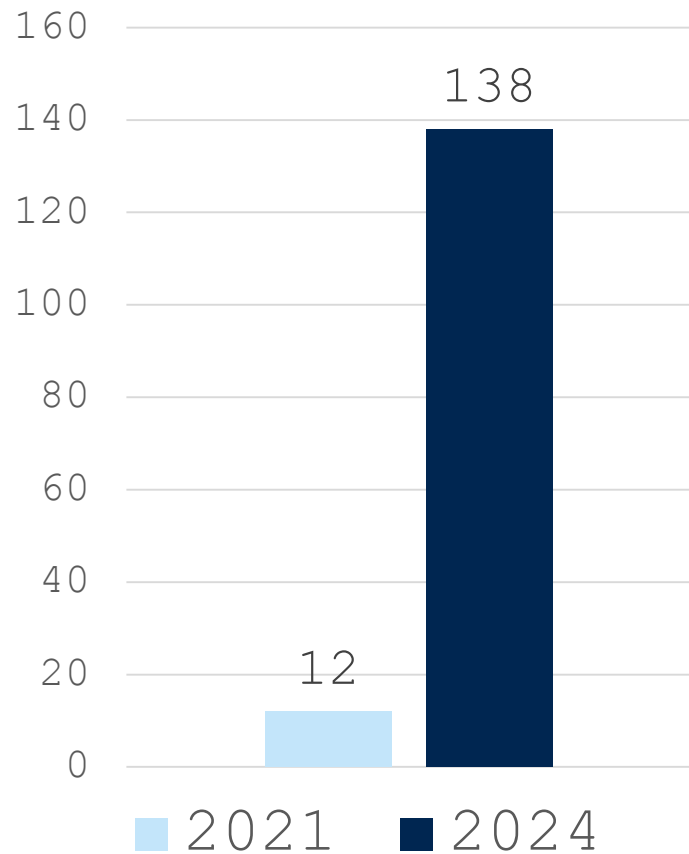


4,400+
People

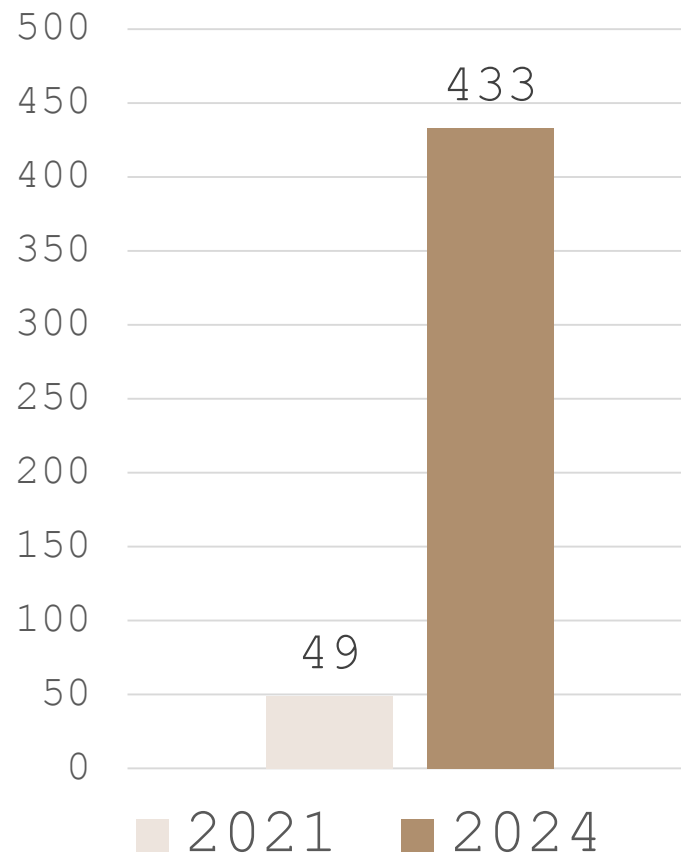
remained housed with
eviction prevention
and rent assistance
programs.

Building a System of Care

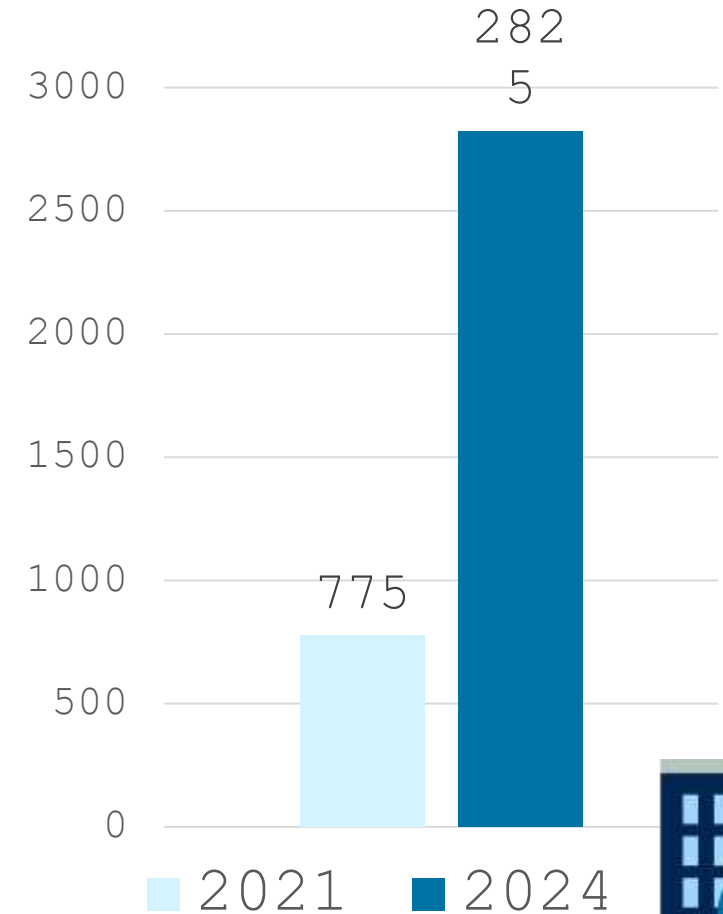
Case Managers/
Outreach Workers



Shelter Units



Housing Capacity



Goals and Outcomes



Work Plan Metric Goals Overview

	Outcomes	Year 3 Goal
Permanent Supportive Housing	399 households 679 people	500 households
Rapid Re-Housing	241 households 521 people	300 households
Move In Ready Fund	6 households 6 people	200 households
Eviction Preventions	1,569 households 4,451 people	500 households
Shelter created	90 units	60 units

Highlights

- Exceeded PSH goal previous year by 130 households
- Move In Ready launched later than anticipated
- Exceeded Eviction Prevention goal, note this program serves primarily Population B and is our most effective program at reaching underserved populations. (Eviction Prevention has been funded with dwindling carryover investments.)

Populations Served



Partnerships with culturally specific providers leading to increased reach for Latine households



SHS funded interventions have more diverse outcomes than other Homeless Services programs



Eviction prevention especially effective in reaching diverse populations



Improvements needed to better serve Asian and Native populations

Shelter and Outreach Overview



Shelter Program Outcomes



Safe Rest Village at Aloha UMC opened in February 2024

- 433 shelter beds (420 funded by SHS)
- 60 pod shelter units currently open

Next Up:

- Beaverton Year-round Shelter opening December
- Just Compassion Resource Center opening spring
- Exploring additional pod shelter site

Shelter System

Western Washington County (Forest Grove & Cornelius)

Casa Amparo, 20 rooms

Cornelius Safe Rest Pods on 4th Ave, 30 pods (Temporary)

Hillsboro

Safe Rest Pods on SW 17th Avenue, 30 pods (Temporary)/
FUTURE year-round Hillsboro shelter, 75 beds/pods

Safe Place Youth Shelter, 12 beds

Hillsboro Bridge Shelter, 50 rooms (Temporary)

Community Action Family Shelter, 5-9 rooms

Cloverleaf Shelter, 50 beds (Temporary)

Beaverton & Aloha

Safe Rest Village at Aloha United Methodist Church, 30 pods (Temporary)

Veterans Shelter, 58 beds

Beaverton Temporary Shelter, 40 beds (Temporary)

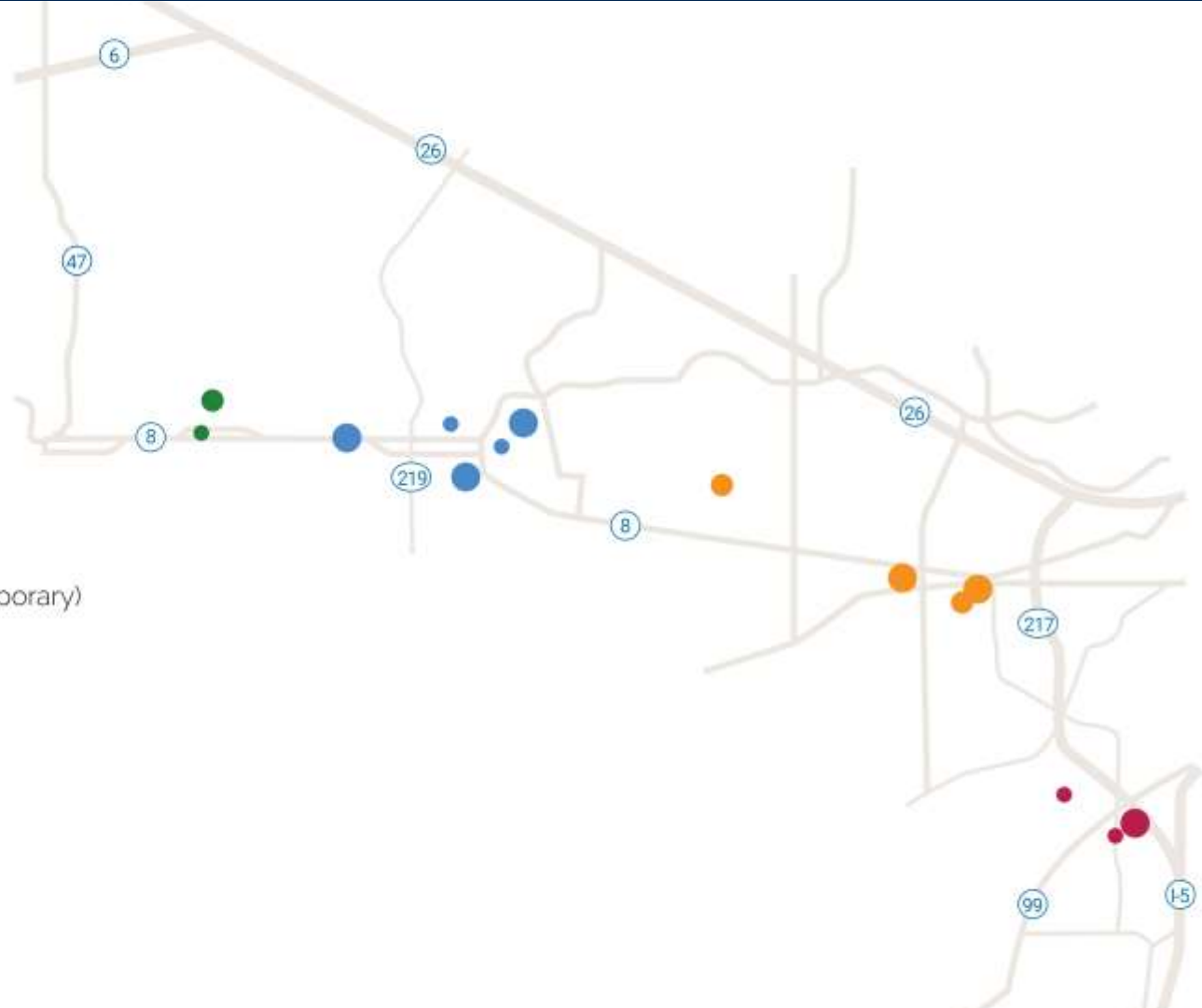
FUTURE year-round Beaverton shelter, 60 beds

Tigard, Tualatin, & Sherwood

Good Neighbor Center, 5-9 rooms

Tigard Just Compassion Shelter, 20 beds (60 beds 2024)

Family Promise of Tualatin Valley, 70 rooms

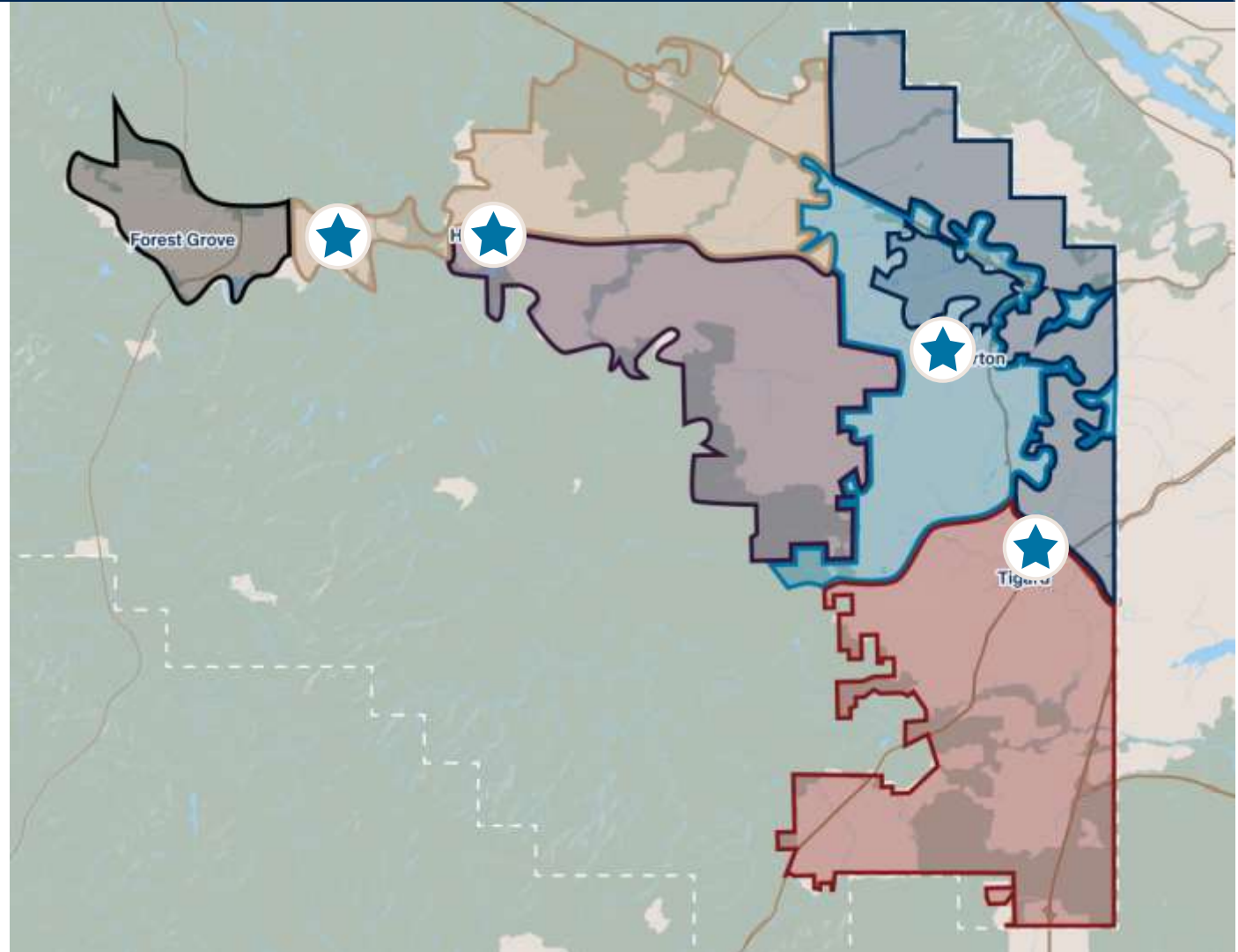


Outreach and Access Centers

Outreach Providers

- Forest Grove Foundation
- ★ Open Door HousingWorks
- ★ Project Homeless Connect
- Greater Good Northwest
- New Narrative
- ★ Just Compassion
- ★ HomePlate
- Immigrant & Refugee Community Organization (IRCO)

★ *Indicates drop-in center locations*



Partnership in Action



Tualatin Impact



Vernon Baker, Just Compassion Director, gives staff a tour of the future Just Compassion Resource Center serving the southern part of the county.

- City liaison position funded representing Tualatin, Sherwood and Tigard – Megan Cohen
- 37 Regional Long-term Rental Assistance (RLRA) vouchers
- Outreach Provider: Just Compassion (HomePlate for youth, IRCO for immigrants & refugees)

Cross-Sector Alignment

- Emergency beds prioritize access for law enforcement and community partner referrals
- \$3 million grant from CareOregon for permanent supportive housing development in Forest Grove
- Low Acuity Transitional Support program at Hillsboro Bridge Shelter partnering with Greater Good NW and Virginia Garcia with \$250,000 Kaiser Permanente grant Healthcare case-conferencing program
- Nationally leading healthcare case-conferencing program



Cornelius Police Chief Coley and Open Door staff attend Cornelius Safe Rest Pods opening event

Provider Partnerships & Capacity Building

24 service providers

- High rate of staff with lived experience
- Higher rates of staff identify as Black, Indigenous, Latino/a/e, or other persons of color compared to the general population.
- Annual salaries from \$50,000 to \$60,000

Housing Careers program

- Enrolled 45 participants
- Year 4 will expand to general employment services to help participants graduate from rent assistance programs with employment.



Housing Careers Program in action.

Advisory Bodies



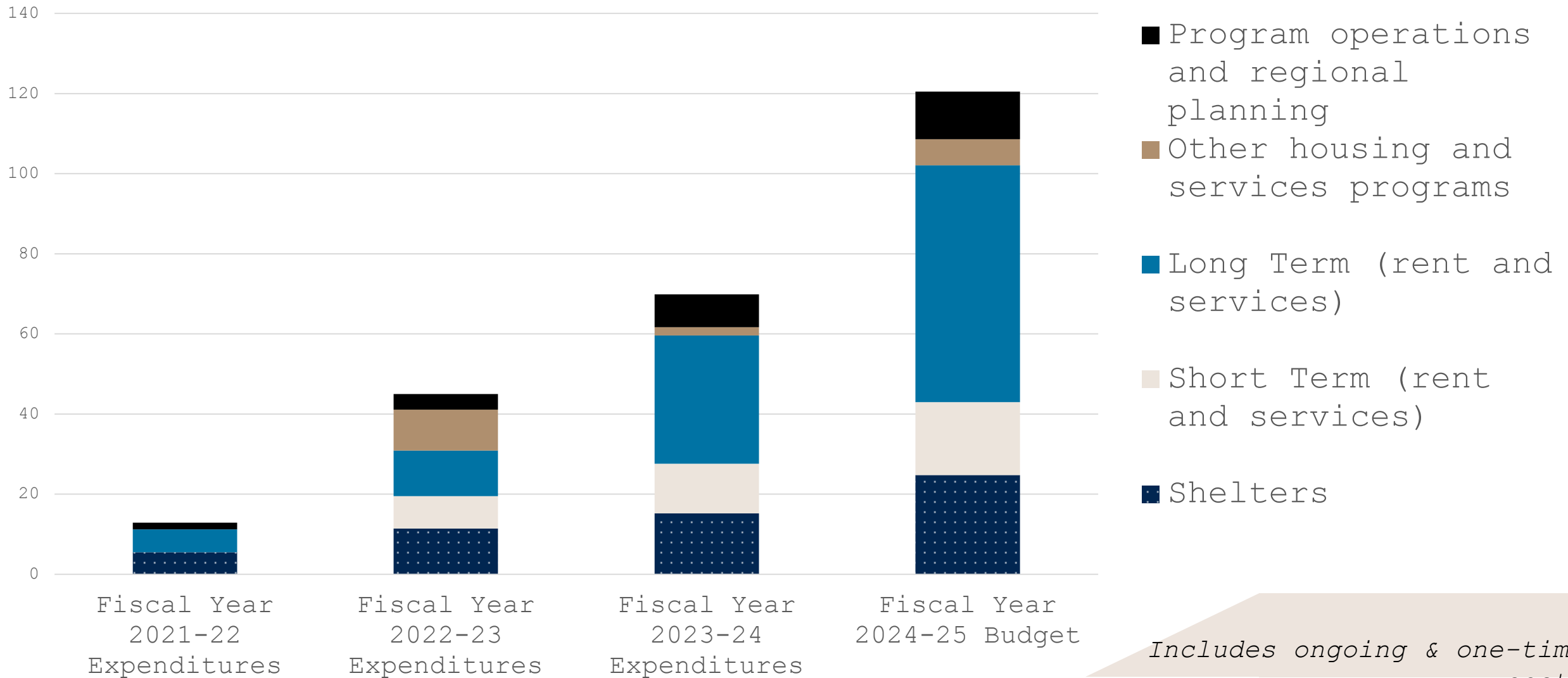
Homeless Solutions Advisory Council members

- NEW Homeless Solutions Advisory Council or the “Solutions Council” launched January 2024 with 10 members
 - Recruitment underway!
- Three subcommittees:
 - Performance Evaluation
 - Lived Experience
 - Equitable Procurement

Financial Overview

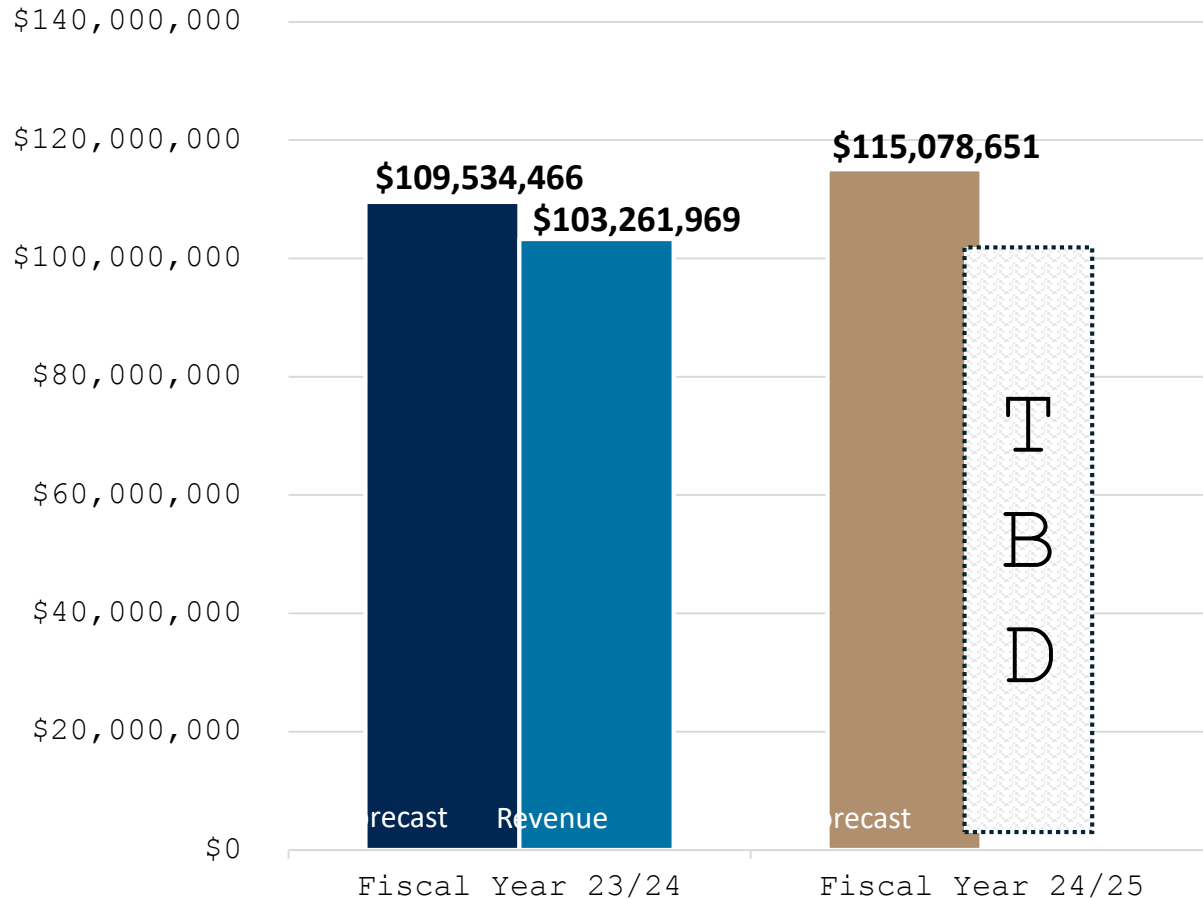


Financial Overview: SHS Growth (in millions)



Includes ongoing & one-time costs

Financial Constraints – Revenue Forecast v Collections



Revenue collections differed from forecast by **\$6.2 million** last fiscal year.

Impact for this fiscal year not yet known, anticipate scaling back some programmatic investments to align with revenue.

New revenue forecast anticipated in November.

Stories of Hope



Kayla and Brady sat down with us in their new apartment.

“We now have an amazing home that we live in. ... All the other cities, other countries in the world, take a note... because this is how you change the world.”

Kayla and Brady stayed at the Tigard family shelter, Bridge to Home, and was able to move into long-term housing with their children last winter.

[Read their full story in the SHS Annual Report.](#)



SHS Impact

Washington County has **housed 2,941 people** (1,817 households) with investments from the voter approved Supportive Housing Services measure.

While state and national trends show the rate of homelessness has ticked up, **unsheltered homelessness has declined by 35.5%** in Washington County.



Department of Housing Services



Thank you





Department of Housing Services



CITY OF TUALATIN

Staff Report

TO: Honorable Mayor and Members of the City Council

THROUGH: Sherilyn Lombos, City Manager

FROM: Nicole Morris, Deputy City Recorder

DATE: December 9, 2024

SUBJECT:
Consideration of Approval of the Work Session and Regular Meeting Minutes of November 25, 2024

RECOMMENDATION:
Staff respectfully recommends the Council adopt the attached minutes.

ATTACHMENTS:

- City Council Work Session Meeting Minutes of November 25, 2024
- City Council Regular Meeting Minutes of November 25, 2024



TUALATIN CITY COUNCIL

OFFICIAL WORK SESSION MEETING MINUTES FOR NOVEMBER 25, 2024

PRESENT: Mayor Frank Bubenik, Council President Valerie Pratt, Councilor Bridget Brooks, Councilor Maria Reyes, Councilor Cyndy Hillier, Councilor Christen Sacco, Councilor Octavio Gonzalez

Mayor Bubenik called the meeting to order at 5:00 p.m.

1. Record Council Holiday Greeting.

The Council recorded the holiday greeting.

2. Grant Application, Acceptance, and Management Policy Discussion.

Assistant City Manager/Finance Director Don Hudson and Assistant Finance Director Matt Warner presented a proposed policy for grant application, acceptance, and management. Director Hudson explained that the policy aims to address the current decentralized system for accepting grant awards. Director Warner outlined the purpose of the policy, which is to establish uniform guidelines and procedures for city staff in developing, submitting, managing grants, and receiving restricted donated funds. He stated the policy's goals are to align grants with the city's mission and priorities, ensure compliance with grant terms to maintain eligibility for future funding, and evaluate fiscal and operational implications. Director Warner reviewed key sections of the policy, including definitions, responsibilities, procedures, and general guidelines. He also provided examples of past and current federal, state, and county grants that would fall under the policy's scope.

Councilor Hillier inquired whether the policy would include a requirement for staff involvement if a grant exceeds a certain amount. Director Hudson clarified that while the policy does not explicitly include such a provision, the need for staff support would be evaluated during the operational analysis conducted for each grant. He emphasized that this would be addressed on a case-by-case basis, depending on the operational capacity and requirements at the time.

Councilor Hillier inquired about the length of the analysis and whether a policy for indirect costs exists. Director Hudson explained there is no established process for analysis or indirect costs, but staff can explore creating such a policy. Councilor Hillier encouraged staff to consider this. She also asked how the policy would improve efficiency and reduce silos.

Councilor Brooks expressed concerns about the potential for added bureaucracy, fearing it could delay grant submissions. She emphasized the importance of incorporating grant planning into the city's strategic planning phase and asked if a draft policy was available. Director Hudson stated the draft would be presented at a future meeting.

Council President Pratt supported the policy and encouraged staff to seek grant funding. She asked how the proposed changes would alter current procedures. Director Hudson explained that

the policy would centralize processes, provide a checklist to ensure steps are not missed, and add resources for staff without significantly changing the overall process.

Councilor Reyes voiced support for establishing a policy and requested a draft for review and feedback.

Councilor Gonzalez also supported the policy and is happy to see it moving forward.

Mayor Bubenik endorsed the concept, highlighting the need to address federal grant reporting requirements and ensure the city has adequate capacity for compliance. Director Hudson agreed, noting that the policy would require a review of administrative requirements before applying for grants to ensure understanding and preparedness.

3. *Planning 401: Development Review Process Overview.*

Assistant Community Development Director Steve Koper and Senior Planner Erin Engman continued the planning education series, focusing on the development review process. Planner Engman began by recapping previous sessions covering land use history, comprehensive planning, and the development code.

Planner Engman explained that the development review process is governed by state law, which sets requirements for procedures, steps, and timelines to ensure the public can review applications and participate in decision-making. She provided an overview of the procedural types (Type I-IV), as outlined in Tualatin Development Code Chapter 32, and described the two decision types: clear and objective decisions and discretionary decisions. Planner Engman outlined the typical process for development review, including intake, staff review, public comment and noticing, and final decision-making, emphasizing the structured yet participatory nature of the process.

Director Koper added that while the land use process is highly technical and detailed, staff make a concerted effort to engage with the public and applicants, answering questions and addressing concerns. He emphasized that staff dedicate significant time to listening and responding to public input, ensuring a human approach to the process, despite its technical nature. Director Koper emphasized the high threshold required to deny an application, noting that unless there is no viable way to meet the development code criteria, including through mitigations like traffic signals or lane adjustments, applications are generally approvable. He stated that denials must be supported by substantial factual evidence. Koper also reiterated that the criteria in place on the date the application is submitted govern the decision-making process, regardless of how long the review takes. He cautioned against incorporating external evidence or criteria not established in the code, even if they seem relevant or appropriate.

Councilor Brooks shared how her understanding of property rights has deepened through her experiences. She acknowledged the importance of property rights as a foundational principle in the country and expressed appreciation for the staff's efforts in providing personal responses to public inquiries. Councilor Brooks noted the numerous emails she receives and praised the staff for their expertise and ability to navigate what can often be a complicated process for the public.

Councilor Sacco inquired about the public notice process, specifically asking where notices are mailed and whether renters are included. She questioned why notices are sent to property owners rather than renters. Director Koper explained that notices are based on information from tax records and are sent to property owners in compliance with state law.

Councilor Sacco followed up by asking how renters can be notified about impacts in their area to ensure they are included in the conversation.

Councilor Reyes asked about the methods used for public notification, inquiring whether it solely involves mailings, emails, and social media, or if applicants are required to hold neighborhood meetings to engage the community directly. Director Koper explained that for neighborhood meetings held by developers before submitting their applications, the notification process mirrors the city's, involving traditional mailings. He stated these mailings are sent to properties within a specific radius, typically 300 feet, and also to any relevant Community Organizations (CIOs). Director Koper noted notifications are not limited to just the immediate area but extend to include surrounding areas, allowing CIOs to help communicate concerns from the broader community.

Councilor Reyes asked if a City Councilor could attend a neighborhood meeting. City Attorney Kevin McConnell advised against Councilors attending such meetings, explaining that it could be considered ex-parte contact and might create potential bias in future matters.

Councilor Brooks suggested considering a more targeted approach to notifying renters in apartment buildings, rather than mailing notices to every individual tenant. She proposed sending notices to the property managers of apartment buildings, who could then post the notices in common areas like lobbies. This would ensure that renters are informed without needing to send individual notices to each resident, which she felt might be more efficient given the number of apartment buildings in the city. Director Koper stated when they have asked for apartment managers to post notices they were not amenable. He stated when they sent to every mailing address in the complex the mailing costs exceeded the annual budget for mailings.

Councilor Gonzalez inquired if the responsibility for notifying renters lies with the city, property owners, or CIOs. Director Koper stated it is a policy decision for the Council to determine.

Council President Pratt emphasized the importance of engaging property managers to assist in distributing communications. Director Koper noted challenges in maintaining contact due to high turnover among property management staff.

City Manager Lombos suggested revisiting the topic in early 2025, allowing staff time to research renter notification strategies further.

Mayor Bubenik asked about the current practice of using conditions of approval and whether they remain effective. Director Koper explained the trend has shifted toward clear and objective conditions, moving away from discretionary practices. City Manager Lombos added that conditional use approvals, previously outside the Planning Commission's purview, are now handled by the commission, reducing the need for Council involvement.

4. Council Meeting Agenda Review, Communications & Roundtable.

Moved to the regular meeting.

Adjournment

Mayor Bubenik adjourned the meeting at 6:55 p.m.

Sherilyn Lombos, City Manager

_____ / Nicole Morris, Recording Secretary

_____ / Frank Bubenik, Mayor



TUALATIN CITY COUNCIL

OFFICIAL MEETING MINUTES
FOR NOVEMBER 25, 2024

PRESENT: Mayor Frank Bubenik, Council President Valerie Pratt, Councilor Bridget Brooks, Councilor Maria Reyes, Councilor Cyndy Hillier, Councilor Christen Sacco, Councilor Octavio Gonzalez

Call to Order

Mayor Bubenik called the meeting to order at 7:05 p.m.

Pledge of Allegiance

Public Comment

None.

Consent Agenda

Motion to adopt the consent agenda made by Council President Pratt, Seconded by Councilor Brooks.

Voting Yea: Mayor Bubenik, Council President Pratt, Councilor Brooks, Councilor Reyes, Councilor Hillier, Councilor Sacco, Councilor Gonzalez

MOTION PASSED

1. Consideration of Approval of the Work Session and Regular Meeting Minutes of November 12, 2024

Special Reports

1. Outside Agency Grant Awardee- Community Partners for Affordable Housing

Community Partners for Affordable Housing (CPAH) Executive Director Rachel Duke and Director of Programs Katherine Moore provided an update on services at Plambeck Gardens. Director Duke shared that Plambeck Gardens features 116 apartments, with move-ins beginning in January 2025. She expressed gratitude to the City for supporting the project, particularly through the recent Outside Agency Grant funds, which will assist CPAH in providing move-in essentials for new residents.

Director Duke outlined the property details and development timeline, noting that all units are designated for individuals earning 60% or less of the Area Median Income (AMI). Director Moore detailed the range of services available at the site, including housing stability and eviction prevention, workforce development, health services, and youth programs. She highlighted that 16 of the units will provide permanent supportive housing with wrap-around case management through a partnership with Community Action. Other service partners include Lifeworks, Centro Cultural, Neighborhood Health Center, and others.

Councilor Reyes suggested partnering with local organizations, such as Borland Free Clinic and Caring Closet, to support residents. Director Moore noted that resource mapping will be conducted by Community Managers to identify and utilize such services.

Councilor Brooks inquired about prioritizing Tualatin residents for housing and services. Director Duke explained that while prioritization is not allowed, some outreach and marketing efforts have focused on the local area.

Councilor Gonzalez offered assistance in connecting residents to local job and trade opportunities.

Council President Pratt asked about the process for families whose income exceeds the AMI threshold. Director Duke outlined CPAH's approach to supporting those families in transitioning to other housing options.

Mayor Bubenik expressed gratitude for CPAH's dedication to the project.

General Business

1. Consideration of a Policy for Proclamations and Agenda Item Additions

City Manager Sherilyn Lombos presented a proposed policy for proclamations and agenda item additions, aimed at ensuring such items receive majority Council support before being added to an agenda. She stated the policy seeks to establish clear processes for proclamation requests and presentations, provide flexibility, and preserve the significance of proclamations. Manager Lombos introduced four tiers for categorizing items, with examples provided for each, and detailed guidelines for agenda placement, including a limit of three proclamations per agenda, sponsorship requests at work sessions, and an application process for public proclamation requests. Manager Lombos sought direction on outstanding questions including the categorization of certain items and whether previously approved proclamations require annual re-approval.

Mayor Bubenik asked about the timeline for requesting proclamations. City Manager Lombos confirming a minimum of one month is needed. Mayor Bubenik suggested adding this timeline to the policy for tiers three and four.

Councilor Brooks proposed an annual review of proclamations to schedule them for the year ahead and expressed satisfaction with the current policy.

Councilor Reyes supported the annual approval process, emphasizing the importance of limiting proclamations to avoid diminishing their significance.

Councilor Sacco agreed with the annual review and raised concerns about tier two items, particularly proclamations tied to other branches of government, and their alignment with the Council's vision. Manager Lombos clarified that tier two items typically involve special presentations rather than proclamations.

Councilor Hillier supported a yearly calendar review for proclamations.

Council President Pratt asked if exceptions could be made for urgent items. Manager Lombos assured flexibility for such situations.

Councilor Brooks also suggested discussing the distinctions between proclamations and resolutions.

Motion to adopt the policy for proclamations and agenda item additions with requested changes related to timelines made by Councilor Brooks, Seconded by Councilor Sacco.

Voting Yea: Mayor Bubenik, Council President Pratt, Councilor Brooks, Councilor Reyes, Councilor Hillier, Councilor Sacco, Councilor Gonzalez

MOTION PASSED

2. Consideration of **Ordinance No. 1495-24** Amending Tualatin Municipal Code 8-1-252 to Add an Additional Street (SW 96th Drive)

Motion to adopt Ordinance No. 1495-24 amending Tualatin Municipal Code 8-1-252 to add an additional street (SW 96th Drive) made by Council President Pratt, Seconded by Councilor Reyes.

DISCUSSION ON MOTION

Councilor Hillier stated that after further research, she would be changing her vote, noting that the ordinance is in the best interest of the city at this time.

Councilor Reyes expressed support for the ordinance, emphasizing that it would only apply during school hours.

Voting Yea: Mayor Bubenik, Council President Pratt, Councilor Brooks, Councilor Reyes, Councilor Hillier, Councilor Gonzalez

Voting Nay: Councilor Sacco

MOTION PASSED

Council Communications

Councilor Brooks stated she attended the National League of Cities Conference, the Washington County Department of Housing Services Annual Forum, and the Tualatin Arts Advisory Committee meeting.

Councilor Sacco stated she attended the Inclusion, Diversity, Equity, and Access (IDEA) Committee meeting.

Councilor Hillier brought attention to recent vandalism at the Byrom Elementary School garden, expressing concern about the impact of such destructive actions on the community's children.

Council President Pratt stated she attended the Clackamas County Business City Managers Forum, the newly elected officials gathering hosted by the Washington County Chamber, the Riverpark CIO meeting, and the C4 Metro meeting.

Councilor Gonzalez expressed interest in helping to restore the gardens damaged at Byrom Elementary School.

Mayor Bubenik asked Councilors to review their committee assignments for discussion in December. He stated he attended the Washington County Coordinating Committee meeting, the Washington

County Mayors meeting, the Riverpark CIO meeting, a meeting with Metro President Peterson, and the Greater Portland Inc. Small Cities Consortium meeting.

Adjournment

Mayor Bubenik adjourned the meeting at 8:20 p.m.

Sherilyn Lombos, City Manager

_____ / Nicole Morris, Recording Secretary

_____ / Frank Bubenik, Mayor



CITY OF TUALATIN

Staff Report

TO: Honorable Mayor and Members of the City Council

THROUGH: Sherilyn Lombos, City Manager

FROM: Lindsay Marshall, Management Analyst, Public Works

DATE: December 9, 2024

SUBJECT:

Resolution No. 5821-24 Authorizing the City Manager to Apply for and Accept Community Development Block Grant Funds to Complete Facilities Enhancements at the Juanita Pohl Center.

RECOMMENDATION:

Staff recommends that Council approve the resolution.

EXECUTIVE SUMMARY:

The Washington County Office of Community Development is accepting proposals for the Community Development Block Grant (CDBG) Program 2025-2026 funding cycle. The City of Tualatin can benefit from this grant program and is seeking CDBG funding to design and construct facilities enhancements at the Juanita Pohl Center.

The Juanita Pohl Center opened in 1982 (as the Tualatin/Durham Senior Center) and is operated by the City of Tualatin. The facility's fundamental function is that of a traditional senior center, providing a place for seniors to meet, recreate, and access valuable services. There is no other public senior center in the area offering similar activities and services. In addition, Meals on Wheels administers a congregate meal program at the center.

This project seeks to enhance the Juanita Pohl Center in a variety of ways, including reconstruction of the bathrooms to improve ADA accessibility, as well as overall modernization and upgrades to other essential components of the building.

A feasibility study was completed in 2009 that identified modernization needs of the facility. Because there are too many improvements to fund at one time given Tualatin's limited resources for capital projects, the improvements have been broken down into phases to complete as funds become available.

In order to advance this project, the City of Tualatin is requesting \$200,000 of Community Development Block Funds for Public Facilities and Infrastructure, which would be available during the 2025-2026 fiscal year. If the grant funds are awarded, they will be used to design and construct this project.

OUTCOMES OF DECISION:

A copy of a Council approved resolution authorizing an application for Community Development Block Grant funds must be submitted with the application. If approved, staff will submit an application for CDBG funds for this project.

FINANCIAL IMPLICATIONS:

If funded, the City Manager will authorize and accept the funds and the project will move forward. The City may be required to budget for matching funds, which will go through the traditional budgeting process.

ATTACHMENTS:

- **Resolution No. 5821-24** Authorizing the City Manager to Apply for and Accept Community Development Block Grant Funds to Complete Facilities Enhancements at the Juanita Pohl Center.

RESOLUTION NO. 5821-24

A RESOLUTION AUTHORIZING THE CITY MANAGER TO APPLY FOR AND ACCEPT COMMUNITY DEVELOPMENT BLOCK GRANT FUNDS TO COMPLETE FACILITIES ENHANCEMENTS AT THE JUANITA POHL CENTER.

WHEREAS, Washington County is accepting proposals for the Community Development Block Grant Program (CDBG); and

WHEREAS, the City of Tualatin desires to participate in this funding program for the design and construction of the Juanita Pohl Center facilities enhancements; and

WHEREAS, the Juanita Pohl Center opened in 1982 and is operated by the City of Tualatin.

WHEREAS, the facility's fundamental function is that of a traditional senior center, providing a place for seniors to meet, recreate, and access valuable services; and

WHEREAS, this project will include enhancements such as ADA accessibility improvements to the bathrooms, as well as overall modernization and upgrades to other essential components of the building; and

WHEREAS, receiving the CDBG funds would provide funding for project development and construction of the Juanita Pohl Center Facilities Enhancements project.

NOW THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF TUALATIN, OREGON that:

Section 1. The City Manager is authorized to apply for, and if awarded, accept CDBG Grant funding from Washington County for project development and construction of the Juanita Pohl Center Facilities Enhancements project.

Section 2. The City Manager is authorized to execute any and all documents related to the grant application and to effectuate the award.

Section 3. This Resolution is effective upon adoption.

INTRODUCED AND ADOPTED this 9th day of December, 2024.

CITY OF TUALATIN OREGON

BY _____
Mayor

APPROVED AS TO LEGAL FORM

BY _____
City Attorney

ATTEST

BY _____
City Recorder



CITY OF TUALATIN

Staff Report

TO: Honorable Mayor and Members of the City Council

THROUGH: Sherilyn Lombos, City Manager

FROM: Jerianne Thompson, Library Director and Equity & Inclusion Officer

DATE: December 9, 2024

SUBJECT:

Consideration of Resolution no. 5822-24 authorizing the City Manager to accept the 2025 Ready to Read Grant from the State Library of Oregon.

RECOMMENDATION:

Staff recommends approval of Resolution no. 5822-24.

EXECUTIVE SUMMARY:

Tualatin Public Library is eligible to receive the state-funded non-competitive Ready to Read Grant. Grants are distributed annually to all legally established public libraries who apply for and report on their yearly grant spending. In the late 1970's, state funding was initially allocated to support libraries serving preschool aged children. This has changed over time to include an expanded focus on summer reading projects.

The city needs to authorize the acceptance of this grant through a Council action.

OUTCOMES OF DECISION:

Approval of Resolution no. 5822-24 authorizes the City Manager to accept the Ready to Read Grant funding. Revenues from this grant are already allocated within the 2024-25 General Fund budget. The grant funds would be spent in support of the 2025 Summer Reading Program at Tualatin Public Library.

ATTACHMENTS:

- Resolution no. 5822-24

RESOLUTION NO. 5822-24

A RESOLUTION AUTHORIZING THE CITY MANAGER TO ACCEPT THE 2025 READY TO READ GRANT FROM THE STATE LIBRARY OF OREGON

WHEREAS, the State Library of Oregon annually distributes non-competitive Ready to Read Grants to all legally eligible public libraries in Oregon to support childhood literacy; and

WHEREAS, the City is projected to receive \$5,980 in Ready to Read Grant funds for 2025, which will support summer reading at Tualatin Public Library.

NOW THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF TUALATIN, OREGON, that:

Section 1. The City Manager or designee is authorized to accept the grant funds from the State Library of Oregon.

Section 2. This resolution is effective upon adoption.

INTRODUCED AND ADOPTED this 9th day of December, 2024.

CITY OF TUALATIN, OREGON

BY _____
Mayor

APPROVED AS TO FORM

ATTEST:

BY _____
City Attorney

BY _____
City Recorder



City of Tualatin

CITY OF TUALATIN
Staff Report

TO: Honorable Mayor and Members of the City Council

THROUGH: Sherilyn Lombos, City Manager

FROM: Cody Field, Management Analyst II
Kira Hein, Project Manager

DATE: December 9, 2024

SUBJECT:
Consideration of Resolution 5825-24, accepting the System Development Charge Annual Reports for Fiscal Year 2023-24

RECOMMENDATION:
Staff recommends that City Council adopts Resolution 5825-24, authorizing the City Manager to accept the attached reports for the Water, Sewer, Storm, TDT and Parks System Development Charges.

EXECUTIVE SUMMARY:
Council established the current Sewer, Storm, and Water SDCs in 1991, and the Transportation Development Tax in 2010. The Parks SDC was adopted in 2019.

The attached reports fulfill the requirement of ORS 223.311 to provide an annual accounting of the SDCs and to recommend any changes to the SDC Chapter of the Tualatin Municipal Code.

ATTACHMENTS:

- Resolution 5825-24
- Attachment A SDC Annual Reports for FY 23-24 Combined.pdf

RESOLUTION NO. 5825-24

A RESOLUTION AUTHORIZING THE CITY MANAGER TO ACCEPT THE FISCAL YEAR 2024 SYSTEM DEVELOPMENT CHARGE ANNUAL REPORTS FOR WATER, SEWER, STORM, AND PARKS; AND THE FISCAL YEAR 2024 ANNUAL REPORT FOR TRANSPORTATION DEVELOPMENT TAX.

WHEREAS, City Council established the Sewer, Storm, and Water System Development Charges in 1991; and

WHEREAS, City Council established the Transportation Development Tax in 2010; and

WHEREAS, City Council adopted the Parks System Development Charges in 2019; and

WHEREAS, ORS 223.311 requires an annual accounting of the System Development Charges and recommendations of any changes to the System Development Charge Chapter of the Tualatin Municipal Code.

NOW THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF TUALATIN, OREGON, that:

Section 1. The City Council authorizes the City Manager or designee to accept the Fiscal Year 2024 annual reports for Water, Sewer, Storm, and Parks System Development Charges, and the Fiscal Year 2024 annual report for Transportation Development Tax.

Section 2. This resolution is effective upon adoption.

Adopted by the City Council this 9th day of December, 2024.

CITY OF TUALATIN, OREGON

BY _____
Mayor

ATTEST:

BY _____
City Recorder

APPROVED AS TO FORM

BY _____
City Attorney

ATTACHMENT A

CITY OF TUALATIN WATER SYSTEM DEVELOPMENT CHARGE (SDC) REPORT Annual Report for Fiscal Year 2023/24

Introduction

In 1991, the City of Tualatin adopted Ordinance 833-91, which established a System Development Charge (SDC) for connection to the City of Tualatin water system. This SDC fee was based on projected needs of the system and the portion of the system's projected needs that were attributable to growth in the City which placed an additional demand on the water system.

An update to the Water SDC Methodology was approved on December 8, 2003. Beginning February 1, 2005 and each February 1st thereafter, the water SDC automatically increased according to the Engineering News Record Construction Cost Index. These provisions are incorporated into the Tualatin Municipal Code Section 2-06.

In addition to the annual indexing each February, in July 2023 an additional increase was approved by Council on Ordinance No. 1477-23 to enact the recommendation included in the 2023 master plan. The rate increased from \$5,566 to \$8,290 per EDU.

Purpose

The purpose of this report is to fulfill the requirements of ORS 223.311, which requires an annual accounting of SDCs to be performed, and to recommend any changes in the Water SDC as adopted by the City of Tualatin.

Revenue

During the period of this report (July 1, 2023 to June 30, 2024) the City of Tualatin collected \$1,153,910.71 in Water SDC fees in accordance with Ordinance 833-91. Interest earned on the SDC fund balance was \$72,310.87.

Credits

Credits in the amount of \$277,912.69 were used towards the payment of Water SDCs in fiscal year 2023/24.

Expenditures

The Water SDC fees were determined by the ordinance methodology and retained in the Water Development (Water SDC) Fund. Any unspent funds are available to be used on projects in the next

fiscal year and will become part of the beginning fund balance.

Projects funded in fiscal year 2023/24 by the Water SDC revenues were as follows:

Project Description

SDC Amount

1. Transfer to General Fund (Costs associated with management of Water SDC)	\$35,330.00
2. Transfer to Building Fund (Costs associated with processing SDCs by Building Division)	\$40,640.00
3. Transfer to Water Operating	\$515,640.10
<hr/>	
Total Expenditures	\$591,610.10

Recommendation

Staff recommends that Council accept this report and have the City Engineer continue to monitor issues that may arise and review their impact on the Water SDCs. No change to methods, procedures or fees as outlined in Ordinance 833-91 is recommended at this time.

CITY OF TUALATIN
SEWER SYSTEM DEVELOPMENT CHARGE (SDC) REPORT
Annual Report for Fiscal Year 2023/24

Introduction

According to Tualatin Municipal Code, Chapter 2-6-060, System Development Charges (SDCs) for each type of capital improvement provided by the City may be created and shall be established by resolution of the Council. The Sewer SDC fee was established by intergovernmental agreement with Clean Water Services in which the City collects the revenue, remitting 96% to Clean Water Services and retaining 4%. The fee is based on projected needs of the system and the portion of the system's projected needs that were attributable to growth in the City which placed an additional demand on the sewer system.

Purpose

The purpose of this report is to fulfill the requirements of ORS 223.311, which requires an annual accounting of SDCs to be performed, and to recommend any changes in the Sewer SDC as adopted by the City of Tualatin.

Revenue

During the period of this report (July 1, 2023 to June 30, 2024) the City of Tualatin collected \$50,568.09 in Sewer SDC fees from development. Interest earned on the SDC fund balance was \$147,738.78.

Credits

No credits were used towards the payment of Sewer SDC in fiscal year 2023/24.

Expenditures

The Sewer SDC fees are determined by the Clean Water Services methodology and retained in the Sewer Development (Sewer SDC) Fund. Any unspent funds are available to be used on projects in the next fiscal year and will become part of the beginning fund balance.

Projects funded in fiscal year 2023/24 by the Sewer SDC revenues were as follows:

1. Transfer to General Fund (Costs associated with management of Sewer SDC)	\$0
2. Transfer to Building Fund (Costs associated with processing SDCs by Building Division)	\$48,415.00
<hr/> Total Expenditures	<hr/> \$48,415.00

Recommendation

It is recommended the Council accept this report and have the City Engineer continue to monitor issues that may arise and review their impact on the Sewer SDCs. No change to methods, procedures or fees as outlined in Tualatin Municipal Code is recommended at this time.

CITY OF TUALATIN
STORM SYSTEM DEVELOPMENT CHARGE (SDC) REPORT
Annual Report for Fiscal Year 2023/24

Introduction

According to Tualatin Municipal Code, Chapter 2-6-060, System Development Charges (SDCs) for each type of capital improvement provided by the City may be created and shall be established by resolution of the Council. In 1991, the Storm SDC fee was established in Resolution 2666-91, adopting the methodology used by Clean Water Services (then called United Sewerage Services). It is based on projected needs of the system and the portion of the system's projected needs that were attributable to growth in the City which placed an additional demand on the storm drain system.

Purpose

The purpose of this report is to fulfill the requirements of ORS 223.311, which requires an annual accounting of SDCs to be performed, and to recommend any changes in the Storm SDC as adopted by the City of Tualatin.

Revenue

During the period of this report (July 1, 2023 to June 30, 2024) the City of Tualatin collected \$15,765.53 in storm quantity fees and \$12,928.77 in storm quality fees for a total of \$28,694.30 in Storm SDC fees. Interest earned on the SDC fund balance was \$22,161.82.

Credits

No credits were used towards the payment of Storm SDCs in fiscal year 2023/24.

Expenditures

The Storm SDC fees were determined by the Clean Water Services methodology and retained in the Storm Development (Storm SDC) Fund. Any unspent funds are available to be used on projects in the next fiscal year and will become part of the beginning fund balance.

Projects funded in fiscal year 2023/24 by Storm SDC revenues were as follows:

Project Description	SDC Amount
1. Transfer to General Fund (Costs associated with management of Storm SDC)	\$23,680.00
2. Transfer to Building Fund (Costs associated with processing SDCs by Building Division)	\$17,125.00

Total Expenditures

\$40,805.00

Recommendation

Staff recommends that Council accept this report and have the City Engineer continue to monitor issues that may arise and review their impact on the Storm SDCs. No change to methods, procedures or fees as outlined in Municipal Code is recommended at this time.

CITY OF TUALATIN
TRANSPORTATION DEVELOPMENT TAX (TDT) REPORT
Annual Report for Fiscal Year 2023/24

Introduction

In 2010, the City of Tualatin adopted Ordinance 1301-10, which established a Transportation Development Tax (TDT) for which all development must pay to help fund transportation projects in the City of Tualatin. This is a direct adoption of Washington County's TDT and applies throughout the City, whether in Washington or Clackamas County. It is incorporated into the Tualatin Municipal Code in 2-8, Transportation Development Tax.

Purpose

The purpose of this report is to fulfill the requirements of ORS 223.311, which requires an annual accounting of system development charges to be performed (the TDT being a kind of system development charge), and to recommend any changes in the TDT as adopted by the City of Tualatin.

Revenue

During the period of this report (July 1, 2023 to June 30, 2024) the City of Tualatin collected \$1,617,870.91 in TDTs for Washington County and \$0 for Clackamas County for a total of \$1,617,870.91 in accordance with Ordinance 1301-10. Interest earned on the TDT fund balance was \$445,404.23.

Credits

Credits in the amount of \$293,535.41 were issued toward the payment of TDTs in Fiscal Year 2023/2024.

Expenditures

The TDTs were determined by the ordinance methodology and retained in the Transportation Development Tax Fund. Any unspent funds are available to be used on projects in the next fiscal year and will become part of the beginning fund balance.

Projects funded in fiscal year 2023/24 by TDT revenues were as follows:

<u>Project Description</u>	<u>SDC Amount</u>
1. Tualatin-Sherwood Road Utility Relocation (County road-widening project requires relocation of utilities)	\$356,989.21
2. Boones Ferry Corridor – Ibach to South City Limits (Complete Street improvements)	\$3,429,744.51

3. Tualatin Sherwood Rd – Martinazzi to I-5 (Lane use revisions to improve traffic flow and capacity)	\$1,158,135.47
4. Herman Rd Improvements (Portion of complete street improvements)	\$29,889.57
5. Transfer to General Fund (Costs associated with management of TDT)	\$250,060.00
6. Transfer to Building Fund (Costs associated with processing TDTs by Building Division)	\$49,015.00
<hr/>	
Total Expenditures	\$5,023,773.76

Recommendation

It is recommended the Council accept this report and have the City Engineer continue to monitor issues that may arise and review their impact on the TDT. No change to methods, procedures or fees as outlined in Ordinance 1301-10 is recommended at this time.

CITY OF TUALATIN
PARKS SYSTEM DEVELOPMENT CHARGE (SDC) REPORT
Annual Report for Fiscal Year 2023/24

Introduction

According to Tualatin Municipal Code, Chapter 2-6-060, System Development Charges (SDCs) for each type of capital improvement provided by the City may be created and shall be established by resolution of the Council. The Parks SDC fee was established in 1984, and updated as a part of the Parks and Recreation Master Plan and Park System Development Charge Methodology in 2019.

Purpose

The purpose of this report is to fulfill the requirements of ORS 223.311, which requires an annual accounting of SDCs to be performed, and to recommend any changes in the Parks SDC as adopted by the City of Tualatin.

Revenue

During the period of this report (July 1, 2023 to June 30, 2024) the City of Tualatin collected \$2,044,083.52 in Park SDC fees. Interest earned on the SDC fund balance was \$112,761.37.

Credits

There were no credits used towards the payment of Parks SDC in fiscal year 2023/24.

Expenditures

The Park SDC fees are determined by the ordinance methodology and retained in the Park Development (Parks SDC) Fund. Any unspent funds are available to be used on projects in the next fiscal year and will become part of the beginning fund balance.

Project Description

	<u>SDC Amount</u>
1. Parkland Acquisition (Robb Property)	\$ 19,771.00
2. Ice Age Tonquin Trail (Walgraeve Property)	\$ 300.00
3. Basalt Creek Trail (Washington County Bridge)	\$ 60,000.00
4. Tualatin River Greenway Trail Extension (Hwy 99)	\$ 50,173.50
5. Transfer to General Fund/Building Fund	<u>\$ 111,485.00</u>
Total Expenditures	\$241,729.50

Recommendation

Staff recommends Council accept the report. The Parks and Recreation Director will continue to monitor issues that may arise and review any impact on Park SDCs. No proposed changes to methodology or procedures in the Tualatin Municipal Code are recommended at this time.



CITY OF TUALATIN
Staff Report

TO: Honorable Mayor and Members of the City Council
THROUGH: Sherilyn Lombos, City Manager
FROM: Nicole Morris, Deputy City Recorder
DATE: December 9, 2024

SUBJECT:

Consideration of **Resolution No. 5827-24** Canvassing Results of the General Election Held in the City of Tualatin, Washington and Clackamas counties, Oregon on November 5, 2024

RECOMMENDATION:

Staff respectfully recommends the Council adopt the attached resolution canvassing results of the General election held in the City of Tualatin, Washington and Clackamas Counties, Oregon on November 5, 2024

EXECUTIVE SUMMARY:

On November 5, 2024, a general election was held for three Council positions:

<u>COUNCIL Position 2:</u>	Christen Sacco	8,418
<u>COUNCIL Position 4:</u>	Danny O'Neal Cyndy Hillier	3,907 7,506
<u>COUNCIL Position 6:</u>	Valerie Pratt	8,512

Certified Results have been received from Washington and Clackamas Counties. A copy is attached and the originals are on file.

ATTACHMENTS:

- Resolution No 5827-24 Canvassing Election Results of November 5, 2024
- Canvass of Votes

RESOLUTION NO. 5827-24

RESOLUTION CANVASSING RESULTS OF THE GENERAL ELECTION
HELD IN THE CITY OF TUALATIN, WASHINGTON AND CLACKAMAS
COUNTIES, OREGON ON NOVEMBER 5, 2024

WHEREAS a General Election was held on November 5, 2024 in the City of Tualatin, Washington and Clackamas Counties, Oregon wherein voters of the City balloted for the election of three Councilors; and

WHEREAS there is on file in the Office of the City Recorder, certified election results filed by the County Clerks of Washington and Clackamas Counties and it is necessary that the Council canvass the results of said election; and

NOW THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF TUALATIN, OREGON, that:

Section 1. The Council hereby finds that the following summary constitutes a true and accurate statement of the election results:

<u>COUNCIL Position 2:</u>	Christen Sacco	8,418
<u>COUNCIL Position 4:</u>	Danny O'Neal	3,907
	Cyndy Hillier	7,506
<u>COUNCIL Position 6:</u>	Valerie Pratt	8,512

Section 2. This resolution is effective upon adoption.

Adopted by the City Council this 9th Day of December, 2024.

CITY OF TUALATIN, OREGON

BY _____
Mayor

ATTEST:

BY _____
City Recorder

Ballots Cast per Contest with Precincts
 Washington County November 5 2024 General Election
 All Precincts, All Districts, All Counter Groups, All ScanStations, All Contests, All Boxes
 Official Results

Total Ballots Cast: 301105, Registered Voters: 400012, Overall Turnout: 75.27%

City of Tualatin, Council Member, Position 2 (Vote for 1)

Precinct	Ballots Cast	Reg. Voters	Total Votes	Christen Sacco		Write-in		Over Votes	Under Votes
Precinct 394	248	353	141	140	99.29%	1	0.71%	0	107
Precinct 420	3223	4148	1939	1901	98.04%	38	1.96%	0	1284
Precinct 423	3051	4495	1964	1931	98.32%	33	1.68%	0	1087
Precinct 428	1359	1967	862	848	98.38%	14	1.62%	0	497
Precinct 433	2171	2698	1284	1248	97.20%	36	2.80%	1	886
Precinct 436	2242	2612	1300	1274	98.00%	26	2.00%	1	941
Precinct 444	121	150	77	77	100.00%	0	0.00%	0	44
Total	12415	16423	7567	7419	98.04%	148	1.96%	2	4846



I, Dan Forester, Washington County
 Elections Division Manager and designee
 of the Ex-Officio County Clerk, do hereby
 certify this to be a true and correct
 copy of the original.

Date: Dec. 2, 2024
 By: [Signature]

Ballots Cast per Contest with Precincts
 Washington County November 5 2024 General Election
 All Precincts, All Districts, All Counter Groups, All ScanStations, All Contests, All Boxes
 Official Results

Total Ballots Cast: 301105, Registered Voters: 400012, Overall Turnout: 75.27%

City of Tualatin, Council Member, Position 4 (Vote for 1)

Precinct	Ballots Cast	Reg. Voters	Total Votes	Danny O'Neal		Cyndy Hillier		Write-in		Over Votes	Under Votes
Precinct 394	248	353	173	46	26.59%	126	72.83%	1	0.58%	0	75
Precinct 420	3223	4148	2623	898	34.24%	1713	65.31%	12	0.46%	0	600
Precinct 423	3051	4495	2439	783	32.10%	1637	67.12%	19	0.78%	0	612
Precinct 428	1359	1967	1049	341	32.51%	707	67.40%	1	0.10%	0	310
Precinct 433	2171	2698	1797	637	35.45%	1150	64.00%	10	0.56%	0	374
Precinct 436	2242	2612	1843	645	35.00%	1190	64.57%	8	0.43%	0	399
Precinct 444	121	150	92	47	51.09%	45	48.91%	0	0.00%	0	29
Total	12415	16423	10016	3397	33.92%	6568	65.58%	51	0.51%	0	2399



Dan Forester, Washington County
 Elections Division Manager and designee
 of the Ex-Officio County Clerk, do hereby
 certify this to be a true and correct
 copy of the original.

Date: Dec. 2, 2024
 By: [Signature]

Ballots Cast per Contest with Precincts
 Washington County November 5 2024 General Election
 All Precincts, All Districts, All Counter Groups, All ScanStations, All Contests, All Boxes
 Official Results

Total Ballots Cast: 301105, Registered Voters: 400012, Overall Turnout: 75.27%

City of Tualatin, Council Member, Position 6 (Vote for 1)

Precinct	Ballots Cast	Reg. Voters	Total Votes	Valerie Pratt		Write-in		Over Votes	Under Votes
Precinct 394	248	353	144	141	97.92%	3	2.08%	0	104
Precinct 420	3223	4148	1944	1920	98.77%	24	1.23%	0	1279
Precinct 423	3051	4495	1975	1947	98.58%	28	1.42%	0	1076
Precinct 428	1359	1967	856	848	99.07%	8	0.93%	0	503
Precinct 433	2171	2698	1315	1292	98.25%	23	1.75%	0	856
Precinct 436	2242	2612	1309	1292	98.70%	17	1.30%	0	933
Precinct 444	121	150	74	74	100.00%	0	0.00%	0	47
Total	12415	16423	7617	7514	98.65%	103	1.35%	0	4798



I, Dan Forester, Washington County Elections Division Manager and designee of the Ex-Officio County Clerk, do hereby certify this to be a true and correct copy of the original.

Date: Dec. 2, 2024
 By: [Signature]

Canvass Results Report

Official Ballots

Run Time 3:18 PM

Run Date 12/02/2024

Clackamas County

November 5, 2024 General Election

11/5/2024

Page 115

Official Results

Registered Voters

248910 of 319822 = 77.83%

Precincts Reporting

119 of 119 = 100.00%

City of Tualatin, Council Member, Pos. 2 - Vote for one

Precinct	Christen Sacco	Cast Votes	Undervotes	Overvotes	Miscellaneous Write-In	Vote by Mail Ballots Cast	Total Ballots Cast	Registered Voters	Turnout Percentage
251	999	999	953	0	25	1,977	1,977	2,284	86.56%
Totals	999	999	953	0	25	1,977	1,977	2,284	86.56%

CERTIFIED COPY OF THE ORIGINAL
CATHERINE MCMULLEN, COUNTY CLERK

BY:



Canvass Results Report

Official Ballots

Run Time 3:18 PM
Run Date 12/02/2024

Clackamas County

November 5, 2024 General Election

11/5/2024
Page 116

Official Results

Registered Voters
248910 of 319822 = 77.83%

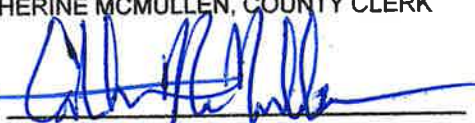
Precincts Reporting
119 of 119 = 100.00%

City of Tualatin, Council Member, Pos. 4 - Vote for one

Precinct	Danny O'Neal	Cyndy Hillier	Cast Votes	Undervotes	Overvotes	Miscellaneous Write-In	Vote by Mail Ballots Cast	Total Ballots Cast	Registered Voters	Turnout Percentage
251	510	938	1,448	524	0	5	1,977	1,977	2,284	86.56%
Totals	510	938	1,448	524	0	5	1,977	1,977	2,284	86.56%

CERTIFIED COPY OF THE ORIGINAL
CATHERINE MCMULLEN, COUNTY CLERK

BY: _____



Canvass Results Report

Official Ballots

Run Time 3:18 PM
Run Date 12/02/2024

Clackamas County

November 5, 2024 General Election

11/5/2024
Page 117

Official Results

Registered Voters
248910 of 319822 = 77.83%

Precincts Reporting
119 of 119 = 100.00%

City of Tualatin, Council Member, Pos. 6 - Vote for one

Precinct	Valerie Pratt	Cast Votes	Undervotes	Overvotes	Miscellaneous Write-In	Vote by Mail Ballots Cast	Total Ballots Cast	Registered Voters	Turnout Percentage
251	998	998	962	0	17	1,977	1,977	2,284	86.56%
Totals	998	998	962	0	17	1,977	1,977	2,284	86.56%

CERTIFIED COPY OF THE ORIGINAL
CATHERINE MCMULLEN, COUNTY CLERK

BY:





CITY OF TUALATIN

Staff Report

TO: Honorable Mayor and Members of the City Council

THROUGH: Sherilyn Lombos, City Manager

FROM: Jerianne Thompson, Library Director & Equity and Inclusion Officer
Betsy Rodriguez Ruef, Community Engagement Coordinator

DATE: December 9, 2024

SUBJECT:
I.D.E.A. Advisory Committee Annual Report

EXECUTIVE SUMMARY:
Co-chairs of the I.D.E.A. Advisory Committee will present their 2024 annual report.

ATTACHMENTS:

- 2024 IDEA Committee annual report
- 2024 IDEA Committee annual report presentation



**Advisory Committee
Annual Report
December 2024**



IDEA Advisory Committee

Committee Roles

1. Advise City Council on areas of opportunity to increase IDEA (inclusion, diversity, equity, access) and belonging in Tualatin
2. Recommend methods to measure progress
3. Recommend ways to remove or lessen barriers to public participation
4. Recommend ways to empower public participation
5. Make recommendations to City Council regarding issues of IDEA and belonging



Pictured: Kolini Fusitu'a, Rebekah Morgan, Chris Paul, Sunni Anderson, Erinn Stimson, Councilor Christen Sacco, Jerianne Thompson (staff), BJ Park, Gerry Preston

Not Pictured: Angelica Butler, Destini Barajas, Winnie Lo, Betsy Ruef

Actions & Accomplishments



Committee Mission

We engage with the community by promoting inclusion, celebrating diversity, pursuing equity, and championing access.

Committee Vision

Every community member is empowered, heard and valued, with equitable access to opportunities and resources, within a vibrant and diverse Tualatin, today and for future generations.

Community Agreements

These Community Agreements aim to create a respectful and inclusive environment for productive discussions and will serve as the guiding principles for our committee interactions.

- Treat everyone with kindness; appreciate people's shared lived experiences.

- Listen with an open mind & be curious.
- Be open to different ideas.
- Take turns speaking, and use a name tent to signal your desire to speak.
- Step up and step back.
- Speak up and take a chance, even if you disagree with the majority.
- Give the benefit of doubt and be willing to grow.
- Call someone in... not out. Leave room for error and seek better understanding. (If you have been corrected, respect that going forward.)
- It's ok have fun!
- Remember conflict is okay. Strive for understanding, not complete agreement.
- Be mindful of people's boundaries.
- Try not to make assumptions.



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Actions: Proclamations



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Action Plan for 2025



Culture & Identity

- Food Carts
- Urban Renewal
- Gathering Places

Community Engagement

- Community Groups
- Public Participation

Housing & Public Safety

- Housing
- Policing

Emerging Topics

- Native Land Acknowledgement



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Questions?



BACKGROUND

The Tualatin Inclusion, Diversity, Equity, and Access (IDEA) Advisory Committee was established by Ordinance 1473-23, adopted by Tualatin City Council on April 10, 2023, and incorporated into the Tualatin Municipal Code as Chapter 11-11. The enabling ordinance requires the IDEA Committee to file an annual report with the Council including a summary of the committee’s activities during the preceding year and other matters and recommendations the committee deems appropriate.

Current members of the IDEA Committee are Sunni Armstrong, Destini Barajas, Angelica Butler, Kolini Fusitu’a, Winnie Lo, Rebekah Morgan, BJ Park (co-chair), Chris Paul (co-chair), Gerry Preston, and Erinn Stimson. Former members included Valerie Holt and Jasmine Wilder, who resigned during the year. Christen Sacco serves as the City Council Liaison, and staff support is provided by Jerianne Thompson, Library Director and Equity & Inclusion Officer, and Betsy Rodriguez Ruff, Community Engagement Coordinator, with additional support from consultant Paradigm Public Affairs.

ROLES OF THE COMMITTEE

per Tualatin Municipal Code, Chapter 11-11:

1. Provide advice to the City Council by conducting research, including engaging with a range of community members and groups, to identify areas of opportunity to increase equity, inclusion, diversity, access, and belonging in Tualatin.
2. Recommend goals, objectives, and methods for the City to use to measure progress towards achieving greater equity, inclusion, diversity, access, and belonging in Tualatin.
3. Review practices and procedures to make recommendations on how to remove or lessen barriers to public participation in City government.
4. Recommend policies and procedures for the City to further empower people to connect with City elected and appointed officials and staff.
5. Make recommendations to the City Council regarding issues of equity, inclusion, diversity, access, and belonging.

ACTIONS AND ACCOMPLISHMENTS

The IDEA Advisory Committee began meeting in December 2023. During the past year, the IDEA Committee undertook the intense yet invigorating work of forming as a City committee and learning about each other’s varied perspectives. Committee members learned the processes for conducting committee business, the role of advisory committees in City governance, and about organizational strategic planning and goal setting. The Committee recognizes the Equity Committee Planning Group (which met in 2023 to develop recommendations for forming the IDEA Committee) for their accomplishments in setting the stage for this Committee’s work.

To guide their work, the Committee developed mission and vision statements.

Mission: We engage with the community by promoting inclusion, celebrating diversity, pursuing equity, and championing access.

Vision: Every community member is empowered, heard and valued, with equitable access to opportunities and resources, within a vibrant and diverse Tualatin, today and for future generations.

The Committee also developed a list of Community Agreements, which aim to create a respectful and inclusive environment for productive discussions:

- Treat everyone with kindness; appreciate people’s shared lived experiences
- Listen with an open mind & be curious
- Be open to different ideas
- Take turns speaking, and use your name tent to signal your desire to speak
- Step up and step back
- Speak up and take a chance, even if you disagree with the majority
- Give the benefit of doubt and be willing to grow
- Call someone in... not out. Leave room for error and seek better understanding
- It’s ok to have fun!
- Remember conflict is okay. Strive for understanding, not complete agreement
- Be mindful of people’s boundaries
- Try not to make assumptions

City staff and consultants provided several learning opportunities for the Committee, to enhance their awareness of key issues and support their work as a Committee, including:

- Tualatin’s demographic profile and the results of the 2023 National Community Survey, measuring Tualatin’s livability.
- Allyship (how to support and lift-up underrepresented voices), the distinction between equity and equality, and how perceived power dynamics can influence public participation.
- The whys and hows of City Council proclamations, which led to the Committee recommending Council adoption of three proclamations presented by Committee members.
 - Tonga Day, August 17, 2024 – presented by Kolini Fusitu’a
 - Dystonia Awareness Month, September 2024 – presented by Erinn Stimson
 - Affordable Housing and Child Care Day, October 10, 2024 – presented by Rebekah Morgan
- The City’s community engagement efforts, opportunities for public participation in project planning, and accessibility improvements made in the City.
 - Committee member Rebekah Morgan participated on the Barriers & Solutions to Housing panel conversation, held on September 30, 2024.
 - Councilor Sacco and City staff provided updates about engagement with the Las Casitas neighborhood, accessibility improvements to City facilities and parks, Outside Agency Grant recipients, community events, and opportunities for participation in public engagement.

The Committee also reviewed the Equity Committee Planning Group’s final report, as well as the City Council 2030 Vision and Council’s 2024 priorities. In discussion, the Committee identified examples of what a “caring and inclusive community” would look like if realized:

- All areas of the community have equitable access to opportunities such as recreation and community events, as well as retail and dining establishments.

- At community events and in shared community spaces, people of different ages and backgrounds mingle together and interact.
- Community garden spaces and accessible leisure and recreational spaces for different sensory needs support connection and community-building.
- Members of the immigrant and refugee communities attend and speak at City Council meetings and are engaged in community discussions.
- All types of Tualatin residents, including renters, are included in community engagement efforts (such as the community survey).
- Information about community needs, projects, and resources is easy to find and share.
- Finding a way for the housing planned within the Basalt Creek Planning Area to be part of the Tigard-Tualatin School District instead of the Sherwood School District, given the proximity to Tualatin High School.

ACTION PLAN FOR 2025

The IDEA Committee is developing a workplan for the upcoming two years. The following themes and topics have been identified as priorities:

- Culture & Identity – supporting Council’s vision of safe & vibrant gathering places throughout the city that build and celebrate our whole community.
 - Food carts
 - Urban renewal
 - Gathering places
- Community Engagement – supporting Council’s vision of a connected, informed, and civically engaged community that embraces our city’s diversity.
 - Community groups
 - Public participation
- Housing & Public Safety – supporting Council’s vision of safe, desirable, welcoming, and sustainable neighborhoods with housing that is available to all.
 - Housing
 - Policing

The Committee is currently learning about the current local landscape for these topics and will set outcomes to guide their work, within the Committee’s roles as set out in the Municipal Code.

The Committee also plans to address emerging topics, as they arise. The first topic planned for consideration is a native land and people acknowledgement. City Council formed a committee to investigate this issue in 2021. That committee developed a draft statement and protocols for use, which Council set aside until the IDEA Committee was formed and could provide recommendations.



THE FOUNDATION

FOR TIGARD TUALATIN SCHOOLS

Margie Greene, Executive Director
Kate Manelis, Board President





**WHAT IS
THE
FOUNDATION?**



We partner with all 17 schools in the Tigard-Tualatin School District to provide funding for educational opportunities not covered by the state budget



Our Programs

School Grants

Art in the Burbs Grants

Post-Secondary Scholarships

Innovative Teaching Grants

IB Travel Grants

Packed with Pride

Food Pantry



**Where does our
funding come
from?**

Private donations
Annual Fund Drive
Gala
Tee Up Fore Schools
Golf Tournament
Community programs
Company matches
Grants



Our Impact



Between 2006 and
2024, we have
granted...



\$602,250

to the five Tualatin schools!

(an average of \$8,300 per
year)



Bridgeport ES

- Artist in residence (with AITB funds)
- iPads
- Math support
- After school clubs (since 2013)



Byrom ES

- Social skills support
- Computer lab teacher
- Literacy support
- iPads
- Differentiated math support



Tualatin ES

- Literacy support
- STEAM extension
- Differentiated math support
- iPads
- AmeriCorps volunteer
- Schoolwide behavioral support



Hazelbrook MS

- After school STEM teacher
- Homework support
- Engineering Academy/Maker Space
- Bilingual IA For ELL students
- Writing support
- TAG field trips
- iPads
- Math support
- LEGO robotics kits
- After school computer lab
- Affinity group advisors



Tualatin HS

- After school academic support
- Homework club
- Math skills support
- Affinity groups
- Activity busses
- Mentor/Coaching program
- Novels for classrooms and library
- School-to-Career coordinator
- Support to reintegrate students post-pandemic
- At Risk senior wraparound services





Thank you for
your support!



CITY OF TUALATIN

Staff Report

TO: Honorable Mayor and Members of the City Council

THROUGH: Sherilyn Lombos, City Manager

FROM: Steve Koper, Assistant Community Development Director
Madeleine Nelson, Assistant Planner

DATE: December 9, 2024

SUBJECT:

Consideration of Ordinance No. 1496-24, a Plan Map Amendment (PMA) to rezone an 8.3-acre site located at 23370 SW Boones Ferry Road from Institutional (IN) to the Medium Low Density Residential (RML) Planning District.

RECOMMENDATION:

On November 20, 2024, the Tualatin Planning Commission voted unanimously (7-0) to recommend approval of the Plan Map Amendment application to City Council.

EXECUTIVE SUMMARY:

The Westlake Consultants, Inc., on behalf of Norwood Horizon Holdings, LLC and Property Owner, Horizon Community Church propose a Plan Map Amendment (PMA) for an 8.3-acre located site at 23370 SW Boones Ferry Road (Tax Lot: 2S135D000106). The requested PMA would change the existing zoning from Institutional (IN) to Medium Low Density Residential (RML). Future development would require submittal and approval of an Architectural Review application subject to compliance with design and siting standards applicable to the RML District.

The applicant's Narrative (Exhibit A) addresses the applicable criteria to the proposal for Comprehensive Plan Amendments. The applicant has also included a Transportation Impact Analysis (Exhibit C) and Utility Availability Memorandum (Exhibit E).

The Findings and Analysis (Exhibit 1) include a review of the proposal and application materials against the applicable criteria and standards, which include: Oregon Statewide Planning Goals, Oregon Administrative Rules, Metro Code, and the Tualatin Comprehensive Plan and Development Code. The specific approval criteria for a Plan Amendment are found at Tualatin Development Code (TDC) Section 33.070(5) and include other applicable criteria and standards that must be met.

OUTCOMES OF DECISION:

The Council may consider the Plan Map Amendment, which, if approved, would change the subject property's zoning designation to Medium Low Density Residential (RML). If the application is denied, the existing zoning of Institutional (IN) would continue to apply.

In sum, the Council may:

- **Approve the Plan Map Amendment**
- **Deny the Plan Map Amendment**

ALTERNATIVES TO RECOMMENDATION:

Alternatively, the Council may:

- Continue consideration of the application to a specified future Council hearing, leaving the hearing and written record open.
 - Close the hearing and the written record, but continue Council deliberations on the applications to a specified future Council hearing.
-

ATTACHMENTS:

- Exhibit 1: Analysis and Findings – PMA24-0004
- Exhibit A: Land Use Application & Narrative
- Exhibit B: Existing and Proposed Zoning
- Exhibit C: Transportation Impact Analysis
- Exhibit D: Tualatin Engineering Response to TPR
- Exhibit E: Utility Availability Memorandum
- Exhibit F: Site Concept Plan
- Exhibit G: Supporting Documents
- Exhibit H: Sherwood School District Service Provider Letter
- Exhibit I: Public Notice
- Exhibit J: Housing Needs Analysis (2019)
- Exhibit K: Housing Production Strategies (2021)
- Exhibit L: Public Comment



Norwood Project Plan Map Amendment (PMA 24-0004)

December 9, 2024

Project Description



Westlake Consultants, Inc., on behalf of Norwood Horizon Holdings and Property Owner, Horizon Community Church, requests approval of:

Plan Map Amendment (PMA 24-0004): The proposal is requesting approval of a Plan Map Amendment (PMA) from Institutional (IN) to Medium Low Density Residential (RML) for a 8.3-acre site located at 23370 SW Boones Ferry Road.



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Existing and Proposed Zoning



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Applicable Criteria – TDC 33.070



- (a) Granting the amendment is in the public interest.
- (b) The public interest is best protected by granting the amendment at this time.
- (c) The proposed amendment is in conformity with the applicable goals and policies of the Tualatin Comprehensive Plan.



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Applicable Criteria – TDC 33.070



(d) The following factors were consciously considered:

- (1) The various characteristics of the areas in the City;
- (2) The suitability of the areas for particular land uses and improvements in the areas;
- (3) Trends in land improvement and development;
- (4) Property values;
- (5) The needs of economic enterprises and the future development of the area; needed right-of-way and access for and to particular sites in the area;
- (6) Natural resources of the City and the protection and conservation of said resources;
- (7) Prospective requirements for the development of natural resources in the City;
- (8) The public need for healthful, safe, esthetic surroundings and conditions;
- (9) Proof of change in a neighborhood or area, or a mistake in the Plan Text or Plan Map for the property under consideration are additional relevant factors to consider.



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Applicable Criteria – TDC 33.070



- (e) If the amendment involves residential uses, then the appropriate school district or districts must be able to reasonably accommodate additional residential capacity by means determined by any affected school district.
- (f) Granting the amendment is consistent with the applicable State of Oregon Planning Goals and applicable Oregon Administrative Rules, including compliance with the Transportation Planning Rule TPR (OAR 660-012-0060).
- (g) Granting the amendment is consistent with the Metropolitan Service District's Urban Growth Management Functional Plan.



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Granting the Amendment is in the Public Interest

The applicant stated the public interest is best protected by granting the **Plan Map Amendment** at this time due to:

- The Medium Low Density Residential (RML) zone would permit the development of townhomes and cottage clusters which are diverse housing types identified as a community need in the Housing Needs Analysis.
- To address the needs of households with moderate incomes identified in the Housing Production Strategy. Townhomes and cottage clusters were cited as smaller and more affordable housing types which may provide opportunities for homeownership.
 - *Noted the trends in both first-time home buyers and empty nesters/aging population looking to downsize which could be served by these housing types.
- The opportunity to achieve economies of scale and efficient site design to provide a significant number of housing units of needed diversity types to meet the needs of households with a variety of income levels.



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Amendment Conforms to the Tualatin Community Plan

Comprehensive Plan goals and policies serve as the adopted expression of the public interest. The applicant has provided evidence that the proposed Plan Map Amendment would satisfy several existing Plan policies and goals:

- **POLICY 3.1.1 DENSITY.** Maintain a citywide residential density of at least eight (8) dwelling units per net acre.

The Medium Low Density Residential (RML) Planning District requires a density between 10 and 25 units per acre depending on housing type. The proposed plan map amendment would increase the City's residential land supply and contribute to the minimum target density provisions.

- **GOAL 3.2.1 HOUSING TYPE DIVERSITY.** Support development of townhomes, duplexes, triplexes, quadplexes, cottages, courtyard housing, accessory dwelling units, single story units, senior housing, and extended family and multi-generational housing in all residential zoning districts.

The proposed 8.3-acre Medium Low Density Residential (RML) Planning District includes a future planned development of townhouse and cottage cluster housing.

- **GOAL 3.5 HOUSING AND TRANSPORTATION.** Encourage development and redevelopment in Tualatin that supports all modes of transportation, including walking, biking and mass transit.

Future development would incorporate circulation for pedestrian, bicyclists and vehicles onsite. Development would include onsite street improvements and frontage improvements on SW Norwood Road. The subject site has Trimet bus service at the intersection of SW Norwood Road and SW Boones Ferry Road.



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The Recommendation Consciously Considers the Characteristics of Land Development Trends, Health and Safety, Natural Resources, Etc.



In response to the **Plan Map Amendment**, the applicant stated the site is:

- Located near public transportation bus lines, future goods and services and employment areas
- Not in an area with known environmental constraints, and would not be in need of environmental protection
- Located near areas that are experiencing housing development (Autumn Sunrise Subdivision, Plambeck Gardens Apartment)
- The applicant noted nearby service and planned improvements to include water, sanitary sewer, stormwater and transportation

***Any future development must go through an Architectural Review and any future development will be required to comply with Tualatin Development Code requirements to address safety, health, and aesthetic factors.**



**CITY of
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The Amendment is Consistent with Oregon Statewide Planning Goals and Administrative Rules Including Compliance with the Transportation Planning Rule (OAR 660-012-0060)

- The applicant provided a review of Oregon's Transportation Planning Rule (TPR) (OAR 660-012-0060) and a trip generation analysis by Lancaster Mobley included in Exhibit C.
- TPR findings identified that subsection (a) and subsection (b) were not triggered as the functional classification of an existing or planned transportation system are not changed by the proposal. The standards for implementing a functional classification system are also not changed by the proposal.
- The Transportation Planning Rule Analysis (Exhibit C) stated subsection (c) would not be triggered since reasonable worst-case development for the proposed zone change is estimated to generate fewer peak hour and daily trips than reasonable worst-case development options under the existing zoning.



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The Amendment is Consistent with Oregon Statewide Planning Goals and Administrative Rules Including Compliance with the Transportation Planning Rule (OAR 660-012-0060)

- Two reasonable worst-case scenarios were considered for the 8.3-acre site under the current Institutional (IN) Planning District.
One option was a 260-student private school. The other option was a 50,000-SF Community Center with a park that includes a sports field and tennis courts.
- The proposed Medium Low Density Residential (RML) Planning District would allow for a worst-case development of 207 townhomes.
- The existing zoning scenarios could generate a greater number of trips when compared to the proposed zoning during each peak hour and over an average weekday.
- The existing and planned transportation system can accommodate the proposed zone change and the TPR criteria are satisfied. Therefore, no long-term analysis of traffic operations in the study area is warranted.
- The City Engineer has reviewed the subject analysis and has determined that it meets the requirements of the Tualatin Development Code.



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Recommendation & Action



The Planning Commission has unanimously (7-0) recommended approval of the Plan Map Amendment.

The City Council may make a decision to:

- *Approve the PMA either as proposed or with additional modification;*
- *Deny the PMA; or*

Alternatively, the Council may:

- *Continue consideration of the application to a specified future Council hearing, leaving the hearing and written record open.*
- *Close the hearing and the written record, but continue Council deliberations on the application to a future Council hearing.*





CITY *of*
TUALATIN

The Norwood Project

**23370 SW Boones Ferry Road
& 9300 SW Norwood Road**

**Tualatin City Council Hearing
Monday, December 9, 2024**



Real Estate & Construction Company



Project Site



Sustainable Developer Approach

Sustainable Development Process



We cannot solve our problems with the same thinking we used when we created them — Albert Einstein



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Real Estate & Construction Company



Planning | Engineering | Surveying

Community Engagement

- We hosted 6 Community Meetings , over the past 15 months
- We gained valuable input from Neighbors and Stakeholders
- "WE LISTENED"

www.Norwoodhousing.com

We're
listening

**A dialogue about
SW NORWOOD ROAD**

WEDNESDAY, November 1

7:00 - 8:30 pm

**Marquis Cafe
19805 SW Boones Ferry Rd.
Tualatin**




Want to talk?



feedback@norwoodhousing.com
norwoodhousing.com



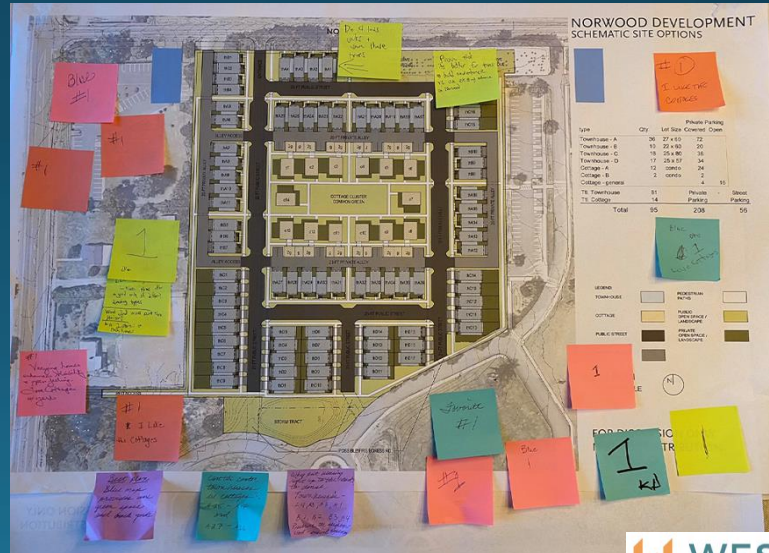
NORWOOD ROAD PROJECT



SW NORWOOD



Community Engagement



Preserved Tree Grove

NORWOOD PRESERVATION



Community Amenities



- ACTIVE PLAY AREAS
- BBQ AND PICNIC
- WALKING TRAILS

COMMUNITY GARDENS



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MILBRANDT
ARCHITECTS

Pedestrian Friendly Neighborhood



COMMON
GREEN
SPACE



LANDSCAPED
OPEN
AREAS



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ARCHITECTS

Small Lot Residential



COMMON GREEN SPACE



Architectural Examples



3-Story Alley-Loaded Townhome - Example



3-Story Front-Loaded Townhome - Example



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MILBRANDT
ARCHITECTS

Architectural Examples



Single Story Cottage - Example B



Single Story Cottage - Example A



2-Story Townhome - Example



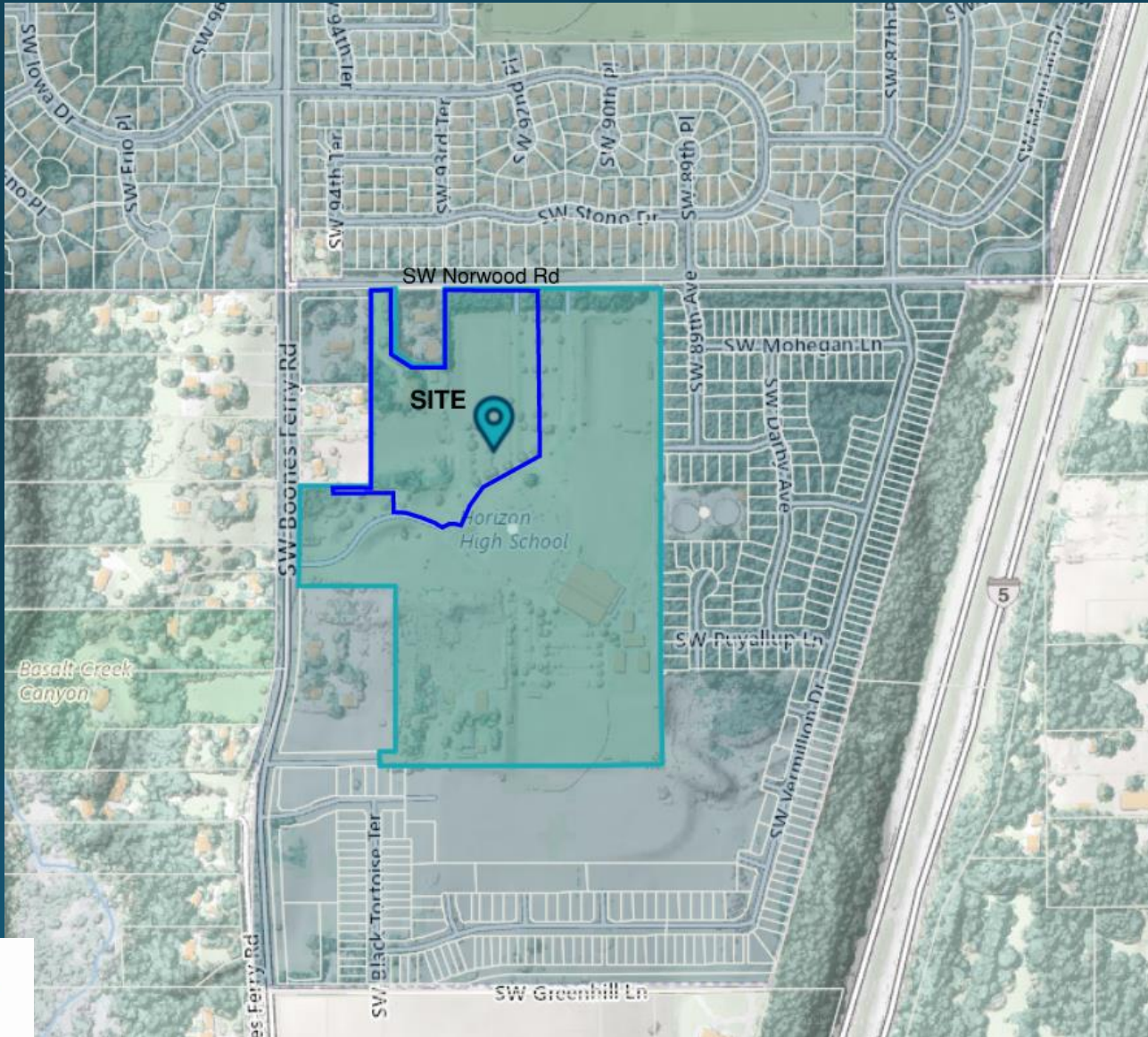
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Site Concept Plan



Vicinity Map



Zoning Map



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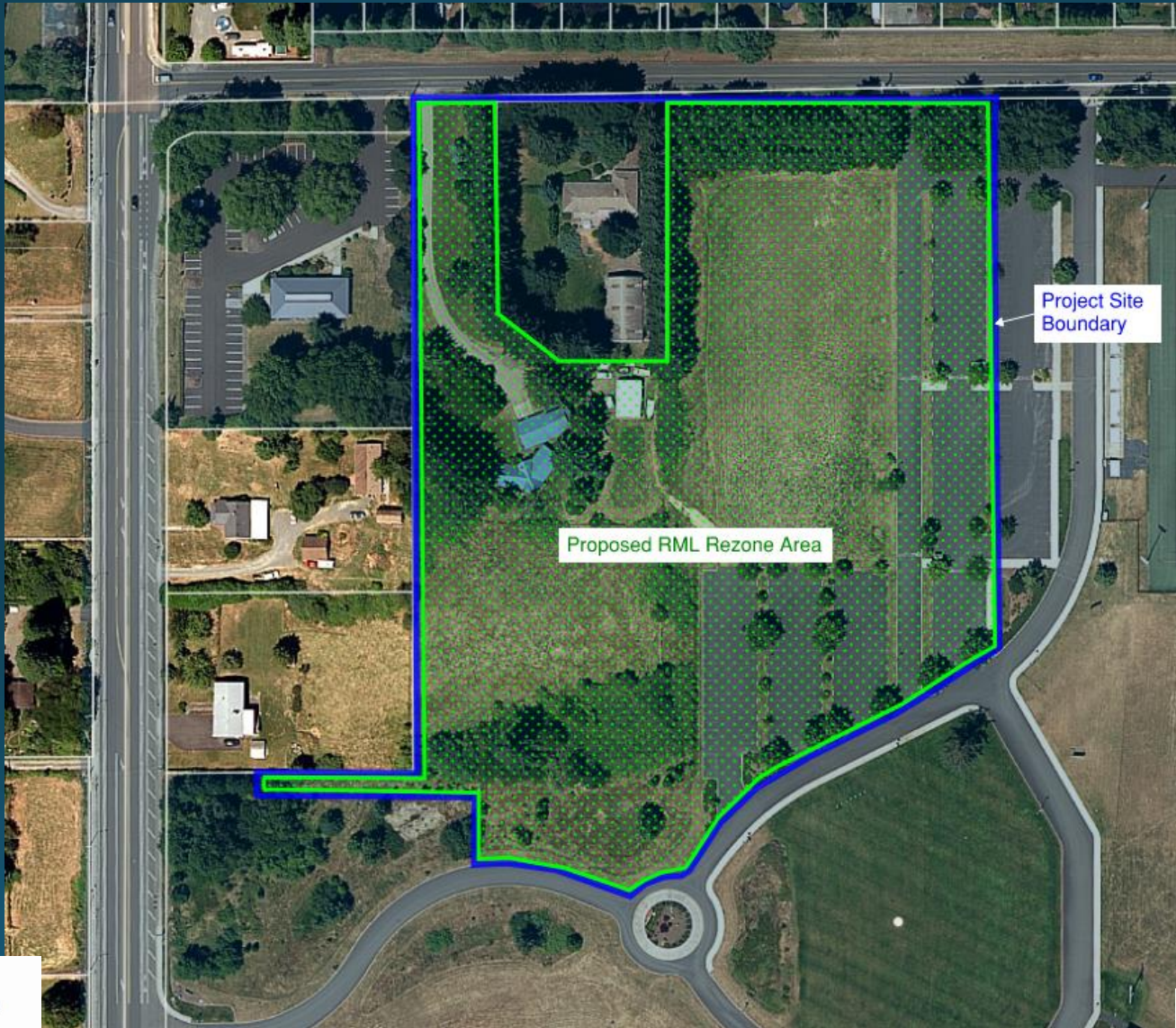


Planning | Engineering | Surveying

Partition Plat



Rezone Plan



Proposed RML Rezone Area

Project Site Boundary

Land Use Application Request

Comprehensive Plan Map Amendment and Zone Change of 8.3 acres
from **Institutional (IN)** to **Medium-Low Density Residential (RML)**

In summary, the following from the adopted Tualatin Housing Needs Analysis and the Housing Production Strategy both support the approval of this application:

- Approximately 37 percent of households in Tualatin are “cost burdened.”
- Tualatin’s median housing sale price increased 50 percent between 2015 and 2019.
- Tualatin needs greater diversity of housing types that would be attainable at a range of income levels.
- Townhomes and cottage clusters will add to the diversity of housing options in the RML zone that may be more attainable to middle-income households.



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Transportation Summary

The Norwood Development project proposes a zone change for approximately 8.3 acres of Horizon campus land. This 8.3 acres is currently zoned Institutional (IN) and is proposed for rezoning to Medium Low Density Residential (RML) consistent with surrounding existing residential zoning.

In summary, this application's transportation analysis finds the following:

- Reasonable worst-case redevelopment scenarios for existing zoning scenarios could generate a greater number of trips when compared to the same under proposed zoning for both peak hour and over an average weekday trips.
- The existing and planned City transportation system can accommodate the proposed zone change and the applicable TPR criteria for application are satisfied.

A separate traffic study will be completed at the time of future site development as required by the Tualatin land use approval process.



Zone Change Approval Summary

- **Community Engagement** – Significant community input provided throughout the land use and site planning process.
- **Needed Housing Provided** – Diversity of housing types will improve attainability.
- **Zoning Designation Consistency** – This Rezone is consistent with existing RML zoning in the immediate surrounding residential areas.
- **Locational Factors** – Proximity to neighborhood services, schools, recreation, and transportation access.
- **Site size** – Economies of scale support lower housing costs.



Planning Commission Approval

- Tualatin Planning Commission recommended Approval of the proposed Zone Change at their 11/20/24 meeting.
- Proposed Zone Change received NO opposition at the Planning Commission meeting or in submitted written testimony.
- Planning Commission acknowledged the Applicant's extensive outreach to Community Members and the input received throughout the planning process.



PROPOSAL:

Comprehensive Plan Map Amendment and Zone Change of 8.3 acres

From: **IN (Institutional)**

To: **RML (Medium Low Density Residential)**

APPLICANT REQUEST:

City Council Approval

THANK YOU



ORDINANCE NO. 1496-24

AN ORDINANCE AMENDING TUALATIN COMPREHENSIVE PLAN MAP 10-1 TO APPLY THE MEDIUM LOW DENSITY RESIDENTIAL (RML) ZONING DISTRICT TO A PARCEL LOCATED AT TAX MAP 2S135D TAX LOT 00106 (PMA 24-0004)

WHEREAS, upon the application of Westlake Consultants, Inc., and with support of the property owner, a public hearing was held before the City Council on December 9, 2024, to consider a Plan Map Amendment to amend the Tualatin Comprehensive Plan Map 10-1 (PMA 24-0004);

WHEREAS, the City provided notice of proposed amendments to the Oregon Department of Land Conservation and Development, as provided in ORS 197.610;

WHEREAS, the City provided notice of the public hearing, as required by TDC 32.240;

WHEREAS, at the public hearing, the Council heard and considered the testimony and evidence presented by City staff, and those appearing at the public hearing, and approved the proposed amendments;

WHEREAS, the Council wishes to amend the Tualatin Comprehensive Plan Map 10-1; and

WHEREAS, the Council finds the proposed amendments to be in the best interest of the residents and inhabitants of the City and the public that the public interest will be served by adopting the amendments at this time, and that the amendments conform to the Tualatin Community Plan and Tualatin Development Code.

THE CITY OF TUALATIN ORDAINS AS FOLLOWS:

Section 1. Comprehensive Plan Map 10-1 is amended as follows:

The Medium Low Density Residential (RML) Zoning District is applied to the area established in Exhibit B.

Section 2. Based on Section 1, the City's Comprehensive Plan Map 10-1 is amended as set forth in Exhibit B, which is attached and incorporated by reference.

Section 3. Findings. The Council adopts the Analysis and Findings, which are attached and incorporated by reference. In support of the Analysis and Findings, Council adopts those materials referenced in the Analysis and Findings, and which are attached as Exhibits A through L, which are attached and incorporated by reference.

Section 4. Effective Date. As provided in the Tualatin Charter, this ordinance is effective 30 days from the date of adoption.

ADOPTED by the City Council this 9th day of December, 2024.

CITY OF TUALATIN, OREGON

BY _____
Mayor

ATTEST:

BY _____
City Recorder



Analysis and Findings for Norwood Plan Map Amendment

Case File #:	PMA 24-0004
Project:	Norwood Plan Map Amendment
Owner:	Horizon Community Church
Applicant:	Norwood Horizon Holdings, LLC
Representative:	Westlake Consultants, Inc.

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EXHIBITS

- Exhibit A: Application & Narrative
- Exhibit B: Existing and Proposed Zoning Maps
- Exhibit C: Transportation Impact Analysis
- Exhibit D: Tualatin Engineering Memorandum
- Exhibit E: Utility Availability Memorandum
- Exhibit F: Site Concept Plan
- Exhibit G: Supporting Documents
- Exhibit H: Sherwood School District Service Provider Letter
- Exhibit I: Public Noticing
- Exhibit J: Housing Needs Analysis (2019)
- Exhibit K: Housing Production Strategies (2021)
- Exhibit L: Public Comment

I. INTRODUCTION

A. Applicable Criteria

Tualatin Development Code (TDC) Chapters 32 and 33; Tualatin Comprehensive Plan; Applicable Oregon Statewide Planning Goals; Applicable Oregon Administrative Rules including compliance with the Transportation Planning Rule; and Metropolitan Service District's Urban Growth Management Functional Plan.

B. Project Description

Westlake Consultants, Inc., on behalf of Norwood Horizon Holdings, LLC and Property Owner, Horizon Community Church propose a Plan Map Amendment application for a 8.3-acre site located at 23370 SW Boones Ferry Road (Tax Lot: 2S135D000106).

Plan Map Amendment:

The requested Plan Map Amendment (PMA) would change the existing zoning from Institutional (IN) to Medium Low Density Residential (RML). Future development would require submittal and approval of an Architectural Review application subject to compliance with design and siting standards applicable to the RML District.

C. Site Description and Surrounding Land Use

The 8.3-acre subject site is located at 23370 SW Boones Ferry Road, east of SW Boones Ferry Road, and south of SW Norwood Road. The site recently completed a partition application (PAR 22-0002) which partitioned the site into two parcels. Parcel 1 contains the existing Horizon Community Church and school facilities. Parcel 2 is the subject of the proposed plan map amendment. Parcel 2 also includes a 1-acre property that is presently zoned Medium Low Density Residential (RML). The remainder of the site is currently zoned Institutional (IN). Parcel 2 includes a single-family residential home and paved parking areas that service the existing church and school. The site takes access from existing access points on SW Norwood Road (Collector classification) and SW Boones Ferry Road (Major Arterial classification). The subject property is generally sloped from north to south and east to west. Located along the site's SW Norwood Road frontage is a stand of mature evergreen trees.

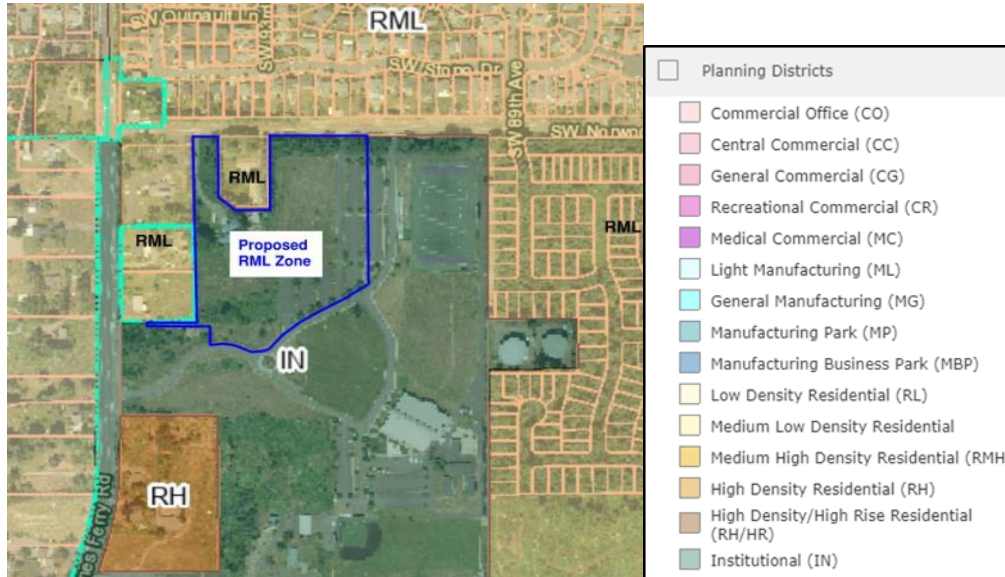


Figure 1 Surrounding Zoning and Land Use

D. Previous Land Use Actions

- AR 12-03 – Expired, Approval May of 2012
- AR 15-20 – Expired, Approval in September of 2019
- ANN 22-0003 – Annexation of a 1.0-acre parcel located at 9300 SW Norwood Road
- PAR 22-0002 – Partition to create two parcels and a tract
- AR 23-0014 – Architectural Review for a new church sanctuary

E. Surrounding Uses

Surrounding uses include:

North: Medium Low Density Residential (RML)

- Norwood Heights Subdivision
- Pennington Heights Subdivision
- SW Norwood Road

South: Medium Low Density Residential (RML)/Neighborhood Commercial (CN)

- Plambeck Gardens Apartments
- Autumn Sunrise Subdivision

West: High Density Residential (RH)/Unincorporated Lots with County FD-20 Zoning

- The Bridge Church NW
- Low Density Residential Properties Zoned County FD-20
- SW Boones Ferry Road

East: Medium Low Density Residential (RML)/Institutional (IN)

- Autumn Sunrise Subdivision
- City-Owned Water Tanks

II. FINDINGS

A: Oregon Statewide Planning Goals

Goal 1 – Citizen Involvement

To develop a citizen involvement program that insures the opportunity for citizens to be involved in all phases of the planning process.

Finding:

The Planning Commission reviewed the proposed amendment at a public meeting on November 20, 2024. The Tualatin Planning Commission voted unanimously to recommend approval of the Plan Map Amendment to City Council. The Planning Commission is the City’s acknowledged Committee for Citizen Involvement (CCI), in compliance with Goal 1.

In addition, the City has followed its acknowledged public notice procedures for quasi-judicial Comprehensive Plan Amendments, found in TDC 32.240. The procedures include a mailed notice of the City Council hearing to surrounding property owners, published notice of the City Council hearing in the Tualatin Times, a submitted notice of the hearing to the Department of Land Conservation and Development (Exhibit I) at least 35 days prior to the first hearing, an emailed notice to affected government entities, and a publicly posted notice of the hearing. Postcard land use application notices were sent to property owners on October 2, 2024 (Exhibit I). The Tualatin Times published the City Council public hearing notice on November 13, 2024 (Exhibit I). The proposed amendment will be considered at a City Council at a public hearing on December 9, 2024. This goal is met.

Goal 2 – Land Use Planning

To establish a land use planning process and policy framework as a basis for all decision and actions related to use of land and to assure an adequate factual base for such decisions and actions.

Finding:

The City of Tualatin’s Comprehensive Plan and Development Code provide an acknowledged and established land use planning process and policy framework which serve as the basis for all decisions and actions related to use of land, including requirements to assure that an adequate factual basis is provided for those decisions and actions. The proposed plan map amendment has been processed in accordance with these procedures. This goal is met.

Goal 5 – Open Spaces, Scenic and Historic Area, and Natural Resource

Goal 5 establishes a process for each resource to be inventoried and evaluated. OAR 660-015-0000(5) and OAR 660.023 (Procedures and Requirements for Complying with Goal 5)

Finding:

The proposed plan map amendment does not modify the City’s existing open space and natural resources requirements or include any text amendment to the regulations for those Goal 5 resources regulated by Tualatin Development Code Chapter 71 (Wetlands Protection District) and Tualatin Development Code Chapter 72 (Natural Resource Protection Overlay District). All future development would be reviewed under the Architectural Review (AR) process to ensure that new construction would be reviewed for compliance with these requirements. This goal will be met.

Goal 6 – Air, Water and Land Resources Quality

Finding:

The Oregon Department of Environmental Quality (DEQ) regulates air, water and land with Clean Water Act (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. The Oregon Department of State Lands and the U.S. Army Corps of Engineers regulate jurisdictional wetlands and CWA Section 404 water of the state and the country respectively. Clean Water Services (CWS) coordinates storm water management, water quality and stream enhancement projects throughout the City. Future development would need to comply with national, state and regional regulations and protections for air, water and land resources. Tualatin has an acknowledged Comprehensive Plan that complies with this goal. All future development would be reviewed for compliance with these requirements. This goal will be met.

Goal 7 – Areas Subject to Natural Disasters and Hazards

Finding:

Tualatin has an acknowledged Comprehensive Plan that complies with this goal. The proposed plan map amendment does not modify the City's natural hazards requirements or existing goals and policies associated with Goal 7 established by the Comprehensive Plan. Future development would be required to comply with the applicable requirements of the Tualatin Development Code under Chapters 70 and 72. This goal will be met.

Goal 8 – Recreation Needs

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 including destination resorts.

Finding:

The proposed plan map amendment does not affect policies associated with recreational needs. Any change to the existing recreational facilities will be reviewed as part of an Architectural Review and compliance with the Tualatin Development Code recreational facilities requirements. This goal will be met.

Goal 9 – Economy of the State

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

Finding:

The proposed amendment does not affect policies, lands, or opportunities associated with Goal 9 established by the Comprehensive Plan. There are no impacts on the inventory of commercial and industrial lands with the submission of this amendment. The major employment areas of the City are protected. This goal is not applicable.

Goal 10 – Housing

To provide for the housing needs of citizens of the state.

Finding:

The proposed plan map amendment would change the zoning designation of the subject site from Institutional (IN) to Medium Low Density Residential (RML). This change would allow a maximum of 25 units per acre for household living uses. Tualatin's 2019 Housing Needs Analysis (Exhibit J) identified a

need to provide opportunities for the development of new single-family attached units. The Housing Needs Analysis also recommended the development of a wider variety of housing types, including cottage clusters and townhouses in the Medium Low Density zones. The Medium Low Density Residential (RML) Planning District permits townhouses and cottage clusters as allowed housing types.

The proposed amendment is consistent with OAR 660-007 (the Metropolitan Housing Rule) which is used by cities such as Tualatin that are within the Portland Metropolitan UGB to demonstrate compliance with Goal 10. Additional findings addressing OAR 660-007 are found below. This goal is met.

Goal 11 – Public Facilities and Services

Finding:

Land within the City of Tualatin is adequately served by public facilities and services. The amendment would encourage compact development and the use of existing services and facilities. The proposed amendment does not affect policies related to public facilities and services including water, sewer, and emergency services. Public facilities are addressed in Tualatin Development Code Chapter 33.070(5)(f)(h)(i), additional materials addressing this standard are provided in Exhibit A, E, and G. This goal is met.

Goal 12 – Transportation

Finding:

The requirements of Goal 12 are addressed through compliance with Oregon Administrative Rule (OAR) Section 660-012-0060, also known as the Transportation Planning Rule or TPR. The proposed amendment’s compliance with the TPR is addressed below under the applicable OAR Section. This goal is met.

Goal 13 – Energy

Finding:

The proposed amendment does not include any changes that are related to or intended to impact Tualatin’s land use regulations pertaining to energy consumption. This goal is not applicable.

Goal 14 – Urbanization

Finding:

The subject property is within the Urban Growth Boundary. The proposal does not contain any proposed modification to the Urban Growth Boundary or development outside of the Urban Growth Boundary. This goal is not applicable.

B: Oregon Administrative Rules

OAR Chapter 660 Division 7 (Metropolitan Housing)

[...]

660-007-0045

Computation of Buildable Lands

(1) The local buildable lands inventory must document the amount of buildable land in each residential plan designation.

(2) The Buildable Land Inventory (BLI): The mix and density standards of OAR 660-007-0030, 660-007-0035 and 660-007-0037 apply to land in a buildable land inventory required by OAR 660-007-0010, as modified herein. Except as provided below, the buildable land inventory at each jurisdiction's choice shall either be based on land in a residential plan/zone designation within the jurisdiction at the time of periodic review or based on the jurisdiction BLI at the time of acknowledgment as updated. Each jurisdiction must include in its computations all plan and/or zone changes involving residential land which that jurisdiction made since acknowledgment. A jurisdiction need not include plan and/or zone changes made by another jurisdiction before annexation to a city. The adjustment of the BLI at the time of acknowledgment shall:

- (a) Include changes in zoning ordinances or zoning designations on residential planned land if allowed densities are changed;**
- (b) Include changes in planning or zoning designations either to or from residential use. A city shall include changes to annexed or incorporated land if the city changed type or density or the plan/zone designation after annexation or incorporation;**
- (c) The county and one or more cities affected by annexations or incorporations may consolidate buildable land inventories. A single calculation of mix and density may be prepared. Jurisdictions which consolidate their buildable lands inventories shall conduct their periodic review simultaneously;**
- (d) A new density standard shall be calculated when annexation, incorporation or consolidation results in mixing two or more density standards (OAR 660-007-0035). The calculation shall be made as follows:**

(A)

- (i) $BLI \text{ Acres} \times 6 \text{ Units/Acre} = \text{Num. of Units}$;**
- (ii) $BLI \text{ Acres} \times 8 \text{ Units/Acre} = \text{Num. of Units}$;**
- (iii) $BLI \text{ Acres} \times 10 \text{ Units/Acre} = \text{Num. of Units}$;**
- (iv) $\text{Total Acres (TA)} - \text{Total Units (TU)}$.**

(B) Total units divided by Total Acres = New Density Standard;

(C) Example:

(i) Cities A and B have 100 acres and a 6-unit-per-acre standard: $(100 \times 6 = 600 \text{ units})$; City B has 300 acres and a 10-unit-per-acre standard: $(300 \times 10 = 3000 \text{ units})$; County has 200 acres and an 8-unit-per-acre standard: $(200 \times 8 = 1600 \text{ units})$; Total acres = 600 - Total Units = 5200.

(ii) $5200 \text{ units} \text{ divided by } 600 \text{ acres} = 8.66 \text{ units per acre standard}$.

(3) Mix and Density Calculation: The housing units allowed by the plan/zone designations at periodic review, except as modified by section (2) of this rule, shall be used to calculate the mix and density. The number of units allowed by the plan/zone designations at the time of development shall be used for developed residential land.

660-007-0050

Regional Coordination

(1) At each periodic review of the Metro UGB, Metro shall review the findings for the UGB. They shall determine whether the buildable land within the UGB satisfies housing needs by type and density for the region's long-range population and housing projections.

(2) Metro shall ensure that needed housing is provided for on a regional basis through coordinated comprehensive plans.

660-007-0060

Applicability

(1) The new construction mix and minimum residential density standards of OAR 660-007-0030 through 660-007-0037 shall be applicable at each periodic review. During each periodic review local government shall prepare findings regarding the cumulative effects of all plan and zone changes affecting residential use. The jurisdiction's buildable lands inventory (updated pursuant to OAR 660-007-0045) shall be a supporting document to the local jurisdiction's periodic review order.

(2) For plan and land use regulation amendments which are subject to OAR 660, Division 18, the local jurisdiction shall either:

(a) Demonstrate through findings that the mix and density standards in this Division are met by the amendment; or

(b) Make a commitment through the findings associated with the amendment that the jurisdiction will comply with provisions of this Division for mix or density through subsequent plan amendments.

Finding:

In 2019, the City of Tualatin completed a Housing Needs Analysis (HNA) which included a computation of the City's residential buildable lands inventory (BLI) (Exhibit J). The BLI analysis complied with statewide planning Goal 10 policies that govern planning for residential uses. Consistent with these sections, the detailed methodology used to complete the buildable lands inventory is presented in Appendix A of the HNA (Exhibit J). The proposed amendment would add buildable residential land. These standards are met.

OAR 660 Division 12 (Transportation Planning)

OAR 660-012-0060

Plan and Land Use Regulation Amendments

(1) If an amendment to a functional plan, an acknowledged comprehensive plan, or a land use regulation (including a zoning map) would significantly affect an existing or planned transportation facility, then the local government must put in place measures as provided in section (2) of this rule, unless the amendment is allowed under section (3), (9) or (10) of this rule. A plan or land use regulation amendment significantly affects a transportation facility if it would:

(a) Change the functional classification of an existing or planned transportation facility (exclusive of correction of map errors in an adopted plan);

(b) Change standards implementing a functional classification system; or

(c) Result in any of the effects listed in paragraphs (A) through (C) of this subsection based on projected conditions measured at the end of the planning period identified in the adopted TSP.

As part of evaluating projected conditions, the amount of traffic projected to be generated within the area of the amendment may be reduced if the amendment includes an enforceable, ongoing requirement that would demonstrably limit traffic generation, including, but not limited to, transportation demand management. This reduction may diminish or completely eliminate the significant effect of the amendment.

(A) Types or levels of travel or access that are inconsistent with the functional

- classification of an existing or planned transportation facility;
- (B) Degrade the performance of an existing or planned transportation facility such that it would not meet the performance standards identified in the TSP or comprehensive plan;**
- or
- (C) Degrade the performance of an existing or planned transportation facility that is otherwise projected to not meet the performance standards identified in the TSP or comprehensive plan.**

(2) If a local government determines that there would be a significant effect, then the local government must ensure that allowed land uses are consistent with the identified function, capacity, and performance standards of the facility measured at the end of the planning period identified in the adopted TSP through one or a combination of the remedies listed in (a) through (e) below, unless the amendment meets the balancing test in subsection (2)(e) of this section or qualifies for partial mitigation in section (11) of this rule. A local government using subsection (2)(e), section (3), section (10) or section (11) to approve an amendment recognizes that additional motor vehicle traffic congestion may result and that other facility providers would not be expected to provide additional capacity for motor vehicles in response to this congestion.

(a) Adopting measures that demonstrate allowed land uses are consistent with the planned function, capacity, and performance standards of the transportation facility.

(b) Amending the TSP or comprehensive plan to provide transportation facilities, improvements or services adequate to support the proposed land uses consistent with the requirements of this division; such amendments shall include a funding plan or mechanism consistent with section (4) or include an amendment to the transportation finance plan so that the facility, improvement, or service will be provided by the end of the planning period.

(c) Amending the TSP to modify the planned function, capacity or performance standards of the transportation facility.

(d) Providing other measures as a condition of development or through a development agreement or similar funding method, including, but not limited to, transportation system management measures or minor transportation improvements. Local governments shall, as part of the amendment, specify when measures or improvements provided pursuant to this subsection will be provided.

(e) Providing improvements that would benefit modes other than the significantly affected mode, improvements to facilities other than the significantly affected facility, or improvements at other locations, if:

(A) The provider of the significantly affected facility provides a written statement that the system-wide benefits are sufficient to balance the significant effect, even though the improvements would not result in consistency for all performance standards;

(B) The providers of facilities being improved at other locations provide written statements of approval; and

(C) The local jurisdictions where facilities are being improved provide written statements of approval.

(3) Notwithstanding sections (1) and (2) of this rule, a local government may approve an amendment that would significantly affect an existing transportation facility without assuring that the allowed land uses are consistent with the function, capacity and performance standards of the facility where:

(a) In the absence of the amendment, planned transportation facilities, improvements and services as set forth in section (4) of this rule would not be adequate to achieve consistency with the identified function, capacity or performance standard for that facility by the end of the planning period identified in the adopted TSP;

(b) Development resulting from the amendment will, at a minimum, mitigate the impacts of the amendment in a manner that avoids further degradation to the performance of the facility by the time of the development through one or a combination of transportation improvements or measures;

[...]

(4) Determinations under sections (1)–(3) of this rule shall be coordinated with affected transportation facility and service providers and other affected local governments.

(a) In determining whether an amendment has a significant effect on an existing or planned transportation facility under subsection (1)(c) of this rule, local governments shall rely on existing transportation facilities and services and on the planned transportation facilities, improvements and services set forth in subsections (b) and (c) below.

(b) Outside of interstate interchange areas, the following are considered planned facilities, improvements and services:

(A) Transportation facilities, improvements or services that are funded for construction or implementation in the Statewide Transportation Improvement Program or a locally or regionally adopted transportation improvement program or capital improvement plan or program of a transportation service provider.

(B) Transportation facilities, improvements or services that are authorized in a local transportation system plan and for which a funding plan or mechanism is in place or approved. These include, but are not limited to, transportation facilities, improvements or services for which: transportation systems development charge revenues are being collected; a local improvement district or reimbursement district has been established or will be established prior to development; a development agreement has been adopted; or conditions of approval to fund the improvement have been adopted.

(C) Transportation facilities, improvements or services in a metropolitan planning organization (MPO) area that are part of the area's federally-approved, financially constrained regional transportation system plan.

(D) Improvements to state highways that are included as planned improvements in a regional or local transportation system plan or comprehensive plan when ODOT provides a written statement that the improvements are reasonably likely to be provided by the end of the planning period.

(E) Improvements to regional and local roads, streets or other transportation facilities or services that are included as planned improvements in a regional or local transportation system plan or comprehensive plan when the local government(s) or transportation service provider(s) responsible for the facility, improvement or service provides a written statement that the facility, improvement or service is reasonably likely to be provided by the end of the planning period.

(c) Within interstate interchange areas, the improvements included in (b)(A)–(C) are considered planned facilities, improvements and services, except where:

(A) ODOT provides a written statement that the proposed funding and timing of mitigation measures are sufficient to avoid a significant adverse impact on the Interstate Highway system, then local governments may also rely on the improvements identified in paragraphs (b)(D) and (E) of this section; or

(B) There is an adopted interchange area management plan, then local governments may also rely on the improvements identified in that plan and which are also identified in paragraphs (b)(D) and (E) of this section.

(d) As used in this section and section (3):

(A) Planned interchange means new interchanges and relocation of existing interchanges

**that are authorized in an adopted transportation system plan or comprehensive plan;
(B) Interstate highway means Interstates 5, 82, 84, 105, 205 and 405; and
(C) Interstate interchange area means:**

(i) Property within one-quarter mile of the ramp terminal intersection of an existing or planned interchange on an Interstate Highway; or

(ii) The interchange area as defined in the Interchange Area Management Plan adopted as an amendment to the Oregon Highway Plan.

(e) For purposes of this section, a written statement provided pursuant to paragraphs (b)(D), (b)(E) or (c)(A) provided by ODOT, a local government or transportation facility provider, as appropriate, shall be conclusive in determining whether a transportation facility, improvement or service is a planned transportation facility, improvement or service. In the absence of a written statement, a local government can only rely upon planned transportation facilities, improvements and services identified in paragraphs (b)(A)–(C) to determine whether there is a significant effect that requires application of the remedies in section (2).

[...]

Finding:

The applicant proposed an amendment to the Comprehensive Plan and Zoning Map designation of the subject property as Tualatin is a single-map Comprehensive Plan/Zoning Map jurisdiction. The project proposed a plan map amendment for approximately 8.3 acres located at 23370 SW Boones Ferry Road (Tax Lot: 2S135D000106), which is currently zone Institutional (IN) and is proposed for rezoning to Medium Low Density Residential (RML).

The applicant provided a review of Oregon’s Transportation Planning Rule (TPR) (OAR 660-012-0060) and a trip generation analysis by Lancaster Mobley included in Exhibit C. The TPR findings of OAR-012-0060 identified that subsection (a) and subsection (b) were not triggered as the functional classification of an existing or planned transportation system are not changed by the proposal. The standards for implementing a functional classification system are also not changed by the proposal.

The Transportation Planning Rule Analysis (Exhibit C) stated subsection (c) would not be triggered since reasonable worst-case development for the proposed zone change is estimated to generate fewer peak hour and daily trips than reasonable worst-case development options under the existing zoning. To understand the potential impacts of the requested zone change, the reasonable worst-case land uses under existing and proposed zoning were compared. Under the existing Institutional (IN) zoning, two scenarios were considered for the 8.3-acre site. One option was a 260-student private school. The other option was a 50,000-SF Community Center with a park that includes a sports field and tennis courts. The proposed Medium Low Density Residential (RML) Planning District would allow for a worst-case development of 207 townhomes. The existing zoning scenarios could generate a greater number of trips when compared to the proposed zoning during each peak hour and over an average weekday.

The level of travel and access will continue to be consistent with the functional classifications of the transportation system. Since potential peak hour volumes are lower with the proposed zoning, the change will not degrade the performance below what was anticipated under existing zoning. The TPR findings concluded that based on the comparison of reasonable worst-case trip generation, the existing and planned transportation system can accommodate the proposed zone change and the TPR criteria are satisfied. Therefore, no long-term analysis of traffic operations in the study area is warranted. These standards are met.

C: Metro Chapter 3.07, Urban Growth Management Functional Plan

**The following Chapters and Titles of Metro Code are applicable to the proposed amendments:
Chapter 3.07, Urban Growth Management Functional Plan**

Finding:

Metro's Urban Growth Management Functional Plan is established in Metro Code as Section 3.07. The following Functional Plan sections are applicable to the proposed plan and map amendment:

Title 1 – Housing Capacity: requires a city or county to maintain or increase its housing capacity.

- *The proposed amendment would create a Medium Low Density Residential (RML) zone of 8.3-acres that permits townhouses at 25 units an acre, as opposed to the current zoning of Institutional (IN) which does not permit residential housing. The proposed plan map amendment would result in an increase in residential capacity. The proposed map amendment would not decrease housing supply, density, or capacity within the City of Tualatin. This standard is met.*

Title 2 – Regional Parking Policy: repealed.

Title 3 – Water Quality and Flood Management: protects Water Quality and Flood Management Areas.

- *Water Quality and Flood Management are addressed in Tualatin Development Code Chapters 70, 71, and 74. No amendments are proposed to these chapters. No physical development is proposed with this application for the plan map amendment. Although there are no known or identified resources existing on the subject site, the site would be further examined for natural resources with future development of the site through an Architectural Review. Future development of the site would need to comply with local, regional, state, and federal requirements for the protection of air, water, and land resources. This standard can be met.*

Title 4 – Industrial and Other Employment Areas: promotes "clustering" of industries that operate more productively and efficiently when in proximity to each other.

- *The subject site is currently zoned to allow Medium Low Density (RML) and Institutional (IN) uses. While the area was previously designated by Metro as an Industrial Area (Title 4, Industrial and Other Employment Areas map), the proposed map amendment does not diminish the industrial or commercial capacities of the City because the area was not zoned for industrial or commercial uses by the City of Tualatin. This standard is not applicable.*

Title 5 - Neighbor Cities and Rural Reserves: repealed

Title 6 – Centers, Corridors, Station Communities and Main Streets: enhancements of these areas as principal centers of urban life via actions and investments.

- *The subject site is not a Regional Center, Town Center, Station Community or Main Street. This standard is not applicable.*

Title 7 – Housing Choice: implements policies regarding establishment of voluntary affordable housing production goals to be adopted by local governments.

- *The proposed plan map amendment would permit townhouses at 25 units an acre, and cottage cluster housing. Page 17 of the applicant's narrative (Exhibit A) cited the 2019 Tualatin Housing Needs Analyst. The submitted narrative stated the HNA forecasted a range of housing types to be*

provided to meet the changing demographic and economic trends including a growing senior population and new young household formation. The applicant included the Tualatin Housing Production Strategy's (Exhibit K) encouragement of diverse housing types that would be relatively more affordable to these specific demographics and other households with moderate incomes. The applicant proposed a site concept plan (Exhibit F) that projects 90 units of diverse housing types including 76 townhouse and 14 cottages.

The applicant stated the use of the large site provides an opportunity to achieve economies of scale and efficient site design not possible on a smaller site. The applicant noted the proposed plan amendment complies with the applicable policies of Tualatin's Comprehensive Plan for increasing opportunities for households at all income levels. The proposed rezone and future proposed development would allow for a variety of attainable housing types, including cottage cluster units and townhomes, which would be more affordable to an array of household sizes and income levels. This standard is met.

Title 8 – Compliance Procedures: ensures all cities & counties are equitably held to the same standards.

- *The City of Tualatin continues to partner with Metro to comply with the Functional Plan. This standard is met.*

Title 9 – Performance Measures: repealed.

Title 10 – Functional Plan Definitions.

Title 11 – Planning for New Urban Areas: guides planning of areas brought into the UGB.

- *The subject site for the proposed Medium Low Density Residential (RML) plan map amendment is not on land eligible for annexation into the City of Tualatin; therefore amendments do not affect planning areas outside of the UGB. This standard is not applicable.*

Title 12 – Protection of Residential Neighborhoods: protects existing residential neighborhoods from pollution, noise, crime, and provides adequate levels of public services.

- *The site of the proposed plan map amendment would be adequately serviced by existing and proposed infrastructure and services. Infrastructure and public services are discussed in greater detail under the findings for TDC 33.070(5)(i).*
- *The applicant's narrative (Exhibit A) stated the requested plan map amendment of the 8.3-acre site from Institutional (IN) zoning designation to Medium Low Density Residential (RML) is consistent with the surrounding zoning and existing single family residential development that border the site. The applicant described the locational advantages for future residents of the site including the proximity to services to reduce the need for vehicular travel, such as, the Tualatin Swim Center (0.4 mi) and Ibach Park (1.1 mi). The site also has convenient access via Norwood Road and Boones Ferry road to nearby commercial areas in Tualatin, as well as, access to Interstate 5. This standard is met.*

Title 13 – Nature in Neighborhoods: conserves, protects and restores a continuous ecologically viable streamside corridor system integrated with upland wildlife habitat and the urban landscape.

- *Protection of natural resources are addressed in Chapter 72 of the Tualatin Development Code. In addition, sites are reviewed for the presence of natural resources, and are reviewed by Clean Water Services at the time of development. No physical development is proposed with this*

application for the plan map amendment. Although no known or identified resources existing on the subject site, it would be further examined for natural resources with future development of the site through an Architectural Review. Future development of the site would need to comply with local, regional, state, and federal requirements for the protection of air, water, and land resources. No amendments to this chapter are proposed under this application. This standard can be met.

Title 14 – Urban Growth Boundary: prescribes criteria and procedures for amendments to the UGB.

- *No amendments are proposed to the UGB under this application. This standard is not applicable.*

D: Tualatin Comprehensive Plan

Chapter 1 – Community Involvement:

POLICY 1.1.3. Conduct the planning process with adequate input and feedback from citizens in each affected neighborhood.

Finding:

The applicant provided evidence that an in-person Neighborhood/Developer Meeting was held on April 17, 2024, that discussed the proposed plan map amendment (Exhibit G). In addition to the required Neighborhood/Developer Meeting under TDC 32.120, the applicant also held an informal outreach process. The applicant team conducted five community visioning sessions to invite input and discussion from the surrounding neighbors and other interested parties. The submitted materials from the informal visioning sessions are included in Exhibit G.

As a land use application requiring a Type IV-A procedure, an advisory recommendation was sought before the Tualatin Planning Commission prior to the City Council meeting. On November 20, 2024, the Tualatin Planning Commission voted unanimously to recommend approval of the Plan Map Amendment.

City staff issued public notice and request for comment in accordance with the noticing procedures outlined in TDC 32.240 and included as Exhibit I. This policy is met.

Chapter 3 – Housing & Residential Growth:

POLICY 3.1.1 DENSITY. Maintain a citywide residential density of at least eight (8) dwelling units per net acre.

Finding:

OR 660-007 requires that Tualatin provide the opportunity for the development of housing at an overall average density of eight dwelling units per net acre. The Medium Low Density Residential (RML) Planning District requires a density between 10 and 25 units per acre based on the housing type. The proposed plan map amendment would increase the City's residential land supply and contribute to the minimum target density provisions. The applicant provided a future site concept plan in Exhibit F that proposes 90 housing units with a mix of townhouses and cottage clusters. No physical development is proposed under the plan map amendment. Future development applications would be reviewed for compliance against the Comprehensive Plan and Development Code at time of submittal. This policy is met.

POLICY 3.2.1 HOUSING TYPE DIVERSITY. Support development of townhomes, duplexes, triplexes, quadplexes, cottages, courtyard housing, accessory dwelling units, single story units, senior housing, and extended family and multi-generational housing in all residential zoning districts.

Finding:

The proposed plan map amendment would change the subject site zoning from Institutional (IN) to Medium Low Density Residential (RML) on the 8.3-acre site. Page 17 of the applicant's narrative (Exhibit A) stated the future planned development of townhomes and cottage clusters under the proposed RML zone aligns with Tualatin's Housing Production Strategy (HPS). The applicant cited the HPS stating that housing types like townhome and cottage clusters are considered more attainable options for the growing populations of downsizing seniors and new households identified in Tualatin's Housing Needs Analysis (HNA). The Housing Needs Analysis forecasted a greater need for relatively affordable attached housing such as

townhomes. The Housing Production Strategy addressed the needs of households with moderate incomes (earning 80%-120% of Washington County's Median Family Income) through a strategy of developing smaller and more affordable housing units, such as cottage housing, which may provide opportunities for homeownership (without subsidy).

The proposed plan map amendment would allow for the future planned development of townhomes and cottage clusters under the Medium Low Density Residential (RML) Planning District. The applicant cited the gaps identified in the availability of housing for the increasing population of both first-time home buyers and empty nesters looking to downsize within the community. The HNA predicted a significant growth in the senior population which is expected to make up 24 percent of the overall population by 2040. The HNA also reported a relatively high proportion (26 percent) of residents under 20 years of age in Tualatin. Over the next 20 years, that population will range in age from 20 to 40 years old, and are predicted to prefer smaller, more affordable single-family homes in communities that are walkable. The proposed future housing development of townhomes and cottage clusters are considered more attainable for buyers with a range of income levels. This policy is met.

GOAL 3.5 HOUSING AND TRANSPORTATION. Encourage development and redevelopment in Tualatin that supports all modes of transportation, including walking, biking and mass transit.

Finding:

The location of the proposed plan map amendment is near the intersection of SW Boones Ferry Road, SW Norwood Road, and the future extension of the Basalt Creek Parkway. The submitted narrative (Exhibit A) wrote that the proposed plan map amendment would allow for a future residential development of the site. The provided concept plan (Exhibit F) included townhomes and cottage cluster homes which would incorporate circulation for pedestrian, bicyclists and vehicles onsite while providing connection to the adjacent developments. The applicant noted the future site development would include onsite street improvements and frontage improvements on SW Norwood Road. The subject site has Trimet bus service at the intersection of SW Norwood Road and SW Boones Ferry Road. The bus service provides connection to the WES Commuter Rail transit stop, the Tualatin Park and Ride transit center, and to commercial employment centers in Tualatin and Wilsonville. No physical development is proposed under the plan map amendment. Future development applications would be reviewed for compliance against the Comprehensive Plan and Development Code at time of submittal. This goal is met.

POLICY 3.7.1 ENVIRONMENTAL PROTECTION. Housing and residential growth policies will be evaluated for consistency with the environmental protection goals and policies of Chapter 7 (Parks, Open Space, and the Environment).

Finding:

Although there are no known or identified resources existing on the subject site, the site would be further examined for natural resources with future development of the site through an Architectural Review to confirm compliance with the environmental protection goals and policies of Chapter 7. Chapters 71 and 72 of the Tualatin Development Code address any Wetland Protection Districts and Natural Resource Overlay Districts.

The applicant's narrative (Exhibit A) outlined the proposed plan map amendment from Institutional (IN) zoning to the Medium Low Density (RML) Planning District would allow for the planned future residential development of townhomes and cottage clusters. The narrative noted as a requirement of a cottage cluster development, a portion of the site will incorporate a common green open space. In addition, the applicant

proposed to preserve a portion of the stand of existing mature evergreen trees along the frontage of SW Norwood Road. Page 18 of the narrative continued by stating that Chapter 7 of the Tualatin Comprehensive Plan calls for “conservation of natural resources and open space areas as well as the development of recreational areas and trails.” The plan amendment application supports the purpose of Chapter 7 through the proposal of a future a walkable community. Future development would include an on-site sidewalk system, as well as, connection to the existing network of the surrounding area from Norwood Road. The City’s Transportation System Plan includes planned pedestrian and bicycle upgrades—to include sidewalks and bicycle lanes—along SW Norwood Road, from SW Boones Ferry to the City’s eastern boundary. No physical development is proposed under the plan map amendment. Future development applications would be reviewed for compliance against the Comprehensive Plan and Development Code at time of submittal. This policy is met.

Chapter 8 – Transportation:

GOAL 8.1 ACCESS AND MOBILITY. Maintain and enhance the transportation system to reduce travel times, provide traveltime reliability, provide a functional and smooth transportation system, and promote access for all users.

Finding:

The applicant provided a review of Oregon’s Transportation Planning Rule (TPR) (OAR 660-012-0060) and a trip generation analysis by Lancaster Mobley included in Exhibit C. The TPR findings of OAR-012-0060 identified that subsection (a) and subsection (b) were not triggered as the functional classification of an existing or planned transportation system are not changed by the proposal. The standards for implementing a functional classification system are also not changed by the proposal.

The Transportation Planning Rule Analysis (Exhibit C) stated subsection (c) would not be triggered since reasonable worst-case development for the proposed zone change is estimated to generate fewer peak hour and daily trips than reasonable worst-case development options under the existing zoning. To understand the potential impacts of the requested zone change, the reasonable worst-case land uses under existing and proposed zoning were compared. Under the existing Institutional (IN) zoning, two scenarios were considered for the 8.3-acre site. One option was a 260-student private school. The other option was a 50,000-SF Community Center with a park that includes a sports field and tennis courts. The proposed Medium Low Density Residential (RML) Planning District would allow for a worst-case development of 207 townhomes. The existing zoning scenarios could generate a greater number of trips when compared to the proposed zoning during each peak hour and over an average weekday.

The level of travel and access will continue to be consistent with the functional classifications of the transportation system. Since potential peak hour volumes are lower with the proposed zoning, the change will not degrade the performance below what was anticipated under existing zoning. The TPR findings concluded that based on the comparison of reasonable worst-case trip generation, the existing and planned transportation system can accommodate the proposed zone change and the TPR criteria are satisfied. Therefore, no long-term analysis of traffic operations in the study area is warranted. This goal is met.

Chapter 9 – Public Facilities and Services:

GOAL 9.1 WATER QUALITY. Provide safe, high-quality water to all customers.

GOAL 9.2 SEWER. Plan, construct, and maintain a City sewer system that protects the public health, protects the water quality of creeks, ponds, wetlands and the Tualatin River, provides cost-effective sewer service, meets the demands of users, addresses regulatory requirements and supports all land

uses.

GOAL 9.3. STORMWATER MANAGEMENT. Provide a plan for routing surface drainage through the City, utilizing the natural drainages where possible. Update the plan as needed with drainage studies of problem areas and to respond to changes in the drainage pattern caused by urban development.

Finding:

The submitted narrative (Exhibit A) stated the proposed future site development would be required to construct appropriate connections to the City’s water system, sewer system and storm water management to adequately serve future uses. The applicant supplied a Utility Availability Report (Exhibit E) that demonstrated public water main, public sewer, and stormwater main lines are accessible from the subject site. The applicant included that a stormwater facility is planned for the southwest portion of the site. The future facility would be designed to meet Clean Water Services’ stormwater design standards for water quality, flow control and hydromodification requirements.

Future site development applications will be reviewed for compliance with the Tualatin Development Code and the City’s Engineering design standards. These goals are or can be met.

Chapter 10 – Land Use Designations and Zoning:

Planning District Objectives

RESIDENTIAL PLANNING DISTRICTS:

Medium Low-Density Residential Planning District (RML)

This district supports household living uses with a variety of housing types at moderately low densities. This district is primarily oriented toward middle housing types including attached dwellings, multi-family development, and manufactured dwelling parks.

OTHER PLANNING DISTRICTS:

Institutional Planning District (IN)

The purpose of this district is to provide an environment exclusively for, and conducive to, the development and operation of religious institutions, schools, public parks, and related uses, in a manner that is harmonious with adjacent and nearby residential, commercial, or manufacturing planning districts and uses.

The district is intended to accommodate large-scale campus-style developments, owned and operated by governmental or nonprofit entities, consisting of multiple structures or facilities, which may serve multiple purposes and provide multiple services to the community.

Permitted and conditional uses shall be developed and operated in a manner that promotes and protects the health, safety, and general welfare of all adjacent and nearby planning districts and uses. Additionally, conditional uses shall be allowed provided that the use is developed and operated in a manner that is consistent with the intent of the planning district, and that promotes and protects the health, safety, and general welfare of all adjacent and nearby planning districts and uses.

The district may be applied to land that is able to accommodate large-scale campus-style development and operation of religious institutions, schools, public parks, and related uses, as follows:

- **Contiguous land one and one-half acre in size or greater;**
- **Access to a collector or arterial street;**
- **Adequate public facilities are available to the property.**

Finding:

The proposed plan map amendment would rezone the 8.3-acre subject site to Medium Low Density Residential (RML) from the current zoning of Institutional (IN). The objective of the RML district is to support household living uses with a variety of housing types at moderately low densities. The RML district is primarily oriented toward middle housing types including attached dwellings, multi-family development, and manufactured dwelling parks. On page 21 of the submitted narrative (Exhibit A), the applicant described the future site development to be a mix of townhomes and cottage cluster homes permitted under the RML planning district. The applicant cited that townhomes and cottage clusters are housing varieties identified as recommendations in Tualatin's 2019 Housing Needs Analysis (Exhibit J) and 2021 Housing Production Strategy (Exhibit K). The narrative stated the plan map amendment from IN to RML would be consistent with the surrounding uses in the area. The subject site is neighbored by Medium Low-Density Residential districts to the north, south, east, and west of the site.

The applicant stated the land proposed for rezoning is currently owned by Horizon Community Church for the Institutional (IN) uses of assembly facilities and a school. The area proposed for the plan map amendment is surplus land that currently operates as vacant land and a parking area for the church and school onsite uses. The church and school uses would continue on the remaining portion of the IN site following the proposed rezone of the 8.3-acre subject property. These objectives are met.

E: Tualatin Development Code

Chapter 32: Procedures

TDC 32.010. - Purpose and Applicability.

(2) Applicability of Review Procedures. All land use and development permit applications and decisions, will be made by using the procedures contained in this Chapter. The procedure "type" assigned to each application governs the decision-making process for that permit or application. There are five types of permit/application procedures as described in subsections (a) through (e) below. Table 32-1 lists the City's land use and development applications and corresponding review procedure(s).

(d) Type IV-A Procedure (Quasi-Judicial Review—City Council Public Hearing). Type IV-A procedure is used when the standards and criteria require discretion, interpretation, or policy or legal judgment and is the procedure used for site-specific land use actions initiated by an applicant. Type IV-A decisions are made by the City Council and require public notice and a public hearing. Appeals of Type IV-A decisions are heard by the Land Use Board of Appeals (LUBA).

(3) Determination of Review Type. Unless specified in Table 32-1, the City Manager will determine whether a permit or application is processed as Type I, II, III, IV-A or IV-B based on the descriptions above. Questions regarding the appropriate procedure will be resolved in favor of the review type providing the widest notice and opportunity to participate. An applicant may choose to elevate a Type I or II application to a higher numbered review type, provided the applicant pays the appropriate fee for the selected review type.

Table 32-1—Applications Types and Review Procedures

Application/Action	Procedure Type	Decision Body*	Appeal Body*	Pre-Application Conference Required	Neighborhood/ Developer Mtg Required	Applicable Code Chapter
Plan Amendments						
• Map or Text Amendments for a specific property	IV-A	CC	LUBA	Yes	Yes	TDC <u>33.070</u>

* City Council (CC); Planning Commission (PC); Architectural Review Board (ARB); City Manager or designee (CM); Land Use Board of Appeals (LUBA).

Finding:

The proposed plan map amendment application is subject to the Type IV-A procedures according to Table 32-1. The application was processed according to the applicable code for Type IV-A procedures. Any future development or construction will be reviewed under a separate land use application. These criteria are met.

TDC 32.030. - Time to Process Applications.

(1) Time Limit—120-day Rule. The City must take final action on all Type II, Type III, and Type IV-A land use applications, as provided by ORS 227.178, including resolution of all local appeals, within 120 days after the application has been deemed complete under TDC 32.160, unless the applicant provides written request or consent to an extension in compliance with ORS 227.178. (Note: The 120-day rule does not apply to Type IV-B (Legislative Land Use) decisions.)

(3) Time Periods. "Days" means calendar days unless otherwise specified. In computing time periods prescribed or allowed by this Chapter, the day of the act or event from which the designated period of time begins is not included. The last day of the period is included, unless it is a Saturday, Sunday, or a legal holiday, in which case the period runs until the end of the next day that is not on a weekend or City recognized legal holiday.

Finding:

The proposed plan map amendment is an amendment to the City's Comprehensive Plan, the 120-day rule portion of ORS 227.178 is not applicable.

TDC 32.110. - Pre-Application Conference.

(1) Purpose of Pre-Application Conferences. Pre-application conferences are intended to familiarize applicants with the requirements of the TDC; to provide applicants with an opportunity discuss proposed projects in detail with City staff; and to identify approval criteria, standards, and procedures prior to filing a land use application. The pre-application conference is intended to be a tool to assist applicants in navigating the land use process, but is not intended to be an exhaustive review that identifies or resolves all potential issues, and does not bind or preclude the City from enforcing any applicable regulations or from applying regulations in a manner differently than may have been indicated at the time of the pre-application conference.

(2) When Mandatory. Pre-application conferences are mandatory for all land use actions identified as requiring a pre-application conference in Table 32-1. An applicant may voluntarily request a pre-application conference for any land use action even if it is not required.

(3) Timing of Pre-Application Conference. A pre-application conference must be held with City staff before an applicant submits an application and before an applicant conducts a Neighborhood/Developer meeting.

(4) Application Requirements for Pre-Application Conference.

(a) Application Form. Pre-application conference requests must be made on forms provided by the City Manager.

[...]

Finding:

A Pre-Application Meeting is mandatory for plan map amendment application. The applicant participated in a Pre-Application Meeting on February 28, 2024, and submitted their application approximately seven months later on September 10, 2024. The applicant team maintained contact with city staff between participating in the Pre-Application Meeting and submitting their application materials to preserve the validity of the Pre-Application Meeting. Documentation of the Pre-Application Meeting is included in Exhibit G. These criteria are met.

TDC 32.120. - Neighborhood/Developer Meetings.

(1) Purpose. The purpose of this meeting is to provide a means for the applicant and surrounding property owners to meet to review a development proposal and identify issues regarding the proposal so they can be considered prior to the application submittal. The meeting is intended to allow the

developer and neighbors to share information and concerns regarding the project. The applicant may consider whether to incorporate solutions to these issues prior to application submittal.

(2) When Mandatory. Neighborhood/developer meetings are mandatory for all land use actions identified in Table 32-1 as requiring a neighborhood/developer meeting. An applicant may voluntarily conduct a neighborhood/developer meeting even if it is not required and may conduct more than one neighborhood/developer meeting at their election.

(3) Timing. A neighborhood/developer meeting must be held after a pre-application meeting with City staff, but before submittal of an application.

(4) Time and Location. Required neighborhood/developer meetings must be held within the city limits of the City of Tualatin at the following times:

(a) If scheduled on a weekday, the meeting must begin no earlier than 6:00 p.m.

(b) If scheduled on a weekend, the meeting must begin between 10:00 a.m. and 6:00 p.m.

(5) Notice Requirements.

(a) The applicant must provide notice of the meeting at least 14 calendar days and no more than 28 calendar days before the meeting. The notice must be by first class mail providing the date, time, and location of the meeting, as well as a brief description of the proposal and its location. The applicant must keep a copy of the notice to be submitted with their land use application.

(b) The applicant must mail notice of a neighborhood/developer meeting to the following persons:

(i) All property owners within 1,000 feet measured from the boundaries of the subject property;

(ii) All property owners within a platted residential subdivision that is located within 1,000 feet of the boundaries of the subject property. The notice area includes the entire subdivision and not just those lots within 1,000 feet. If the residential subdivision is one of two or more individually platted phases sharing a single subdivision name, the notice area need not include the additional phases; and

(iii) All designated representatives of recognized Citizen Involvement Organizations as established in TMC Chapter 11-9.

(c) The City will provide the applicant with labels for mailing for a fee.

(d) Failure of a property owner to receive notice does not invalidate the neighborhood/developer meeting proceedings.

(6) Neighborhood/Developer Sign Posting Requirements. The applicant must provide and post on the subject property, at least 14 calendar days before the meeting. The sign must conform to the design and placement standards established by the City for signs notifying the public of land use actions in TDC 32.150.

(7) Neighborhood/Developer Meeting Requirements. The applicant must have a sign-in sheet for all attendees to provide their name, address, telephone number, and email address and keep a copy of the sign-in sheet to provide with their land use application. The applicant must prepare meeting notes identifying the persons attending, those commenting and the substance of the comments expressed, and the major points that were discussed. The applicant must keep a copy of the meeting notes for submittal with their land use application.

Finding:

The applicant provided evidence that a Neighborhood/Developer Meeting was held on April 17, 2024 that discussed the proposed plan map amendment and the future site development. The applicant provided documentation of sign posting and notification in compliance with Section 32.120 in Exhibit G.

In addition to the mandatory Neighborhood/Developer Meeting required by this section, the applicant team

held five visioning sessions with local neighbors. The applicant's narrative stated the meetings provided an opportunity to share early concepts for the future residential development of the site. The applicant noted that over the course of the five meetings, the future concept side plan evolved in response for sustainable design livability that includes a diversity of residential housing types. These meeting materials are included in Exhibit A and G. These criteria are met.

Section 32.130 – Initiation of Applications.

(1) Type I, Type II, Type III, and Type IV-A Applications. Type I, Type II, Type III, and Type IV-A applications may be submitted by one or more of the following persons:

- (a) The owner of the subject property;**
- (b) The contract purchaser of the subject property, when the application is accompanied by proof of the purchaser's status as such and by the seller's written consent;**
- (c) A lessee in possession of the property, when the application is accompanied by the owners' written consent; or**
- (d) The agent of any of the foregoing, when the application is duly authorized in writing by a person authorized to submit an application by paragraphs (a), (b) or (c) of this subsection, and accompanied by proof of the agent's authority.**

[...]

Finding:

The applicant has provided a title report, included as Exhibit G, showing Horizon Community Church to be the current owner of the subject site. The applications have been submitted by the property owners and contract purchasers of the property affected by the proposed plan map amendment. These criteria are met.

Section 32.140 – Application Submittal.

(1) Submittal Requirements. Land use applications must be submitted on forms provided by the City. A land use application may not be accepted in partial submittals. All information supplied on the application form and accompanying the application must be complete and correct as to the applicable facts. Unless otherwise specified, all of the following must be submitted to initiate completeness review under TDC 32.160:

- (a) A completed application form. The application form must contain, at a minimum, the following information:**
 - (i) The names and addresses of the applicant(s), the owner(s) of the subject property, and any authorized representative(s) thereof;**
 - (ii) The address or location of the subject property and its assessor's map and tax lot number;**
 - (iii) The size of the subject property;**
 - (iv) The comprehensive plan designation and zoning of the subject property;**
 - (v) The type of application(s);**
 - (vi) A brief description of the proposal; and**
 - (vii) Signatures of the applicant(s), owner(s) of the subject property, and/or the duly authorized representative(s) thereof authorizing the filing of the application(s).**
- (b) A written statement addressing each applicable approval criterion and standard;**
- (c) Any additional information required under the TDC for the specific land use action sought;**
- (d) Payment of the applicable application fee(s) pursuant to the most recently adopted fee schedule;**
- (e) Recorded deed/land sales contract with legal description.**

- (f) A preliminary title report or other proof of ownership.**
 - (g) For those applications requiring a neighborhood/developer meeting:**
 - (i) The mailing list for the notice;**
 - (ii) A copy of the notice;**
 - (iii) An affidavit of the mailing and posting;**
 - (iv) The original sign-in sheet of participants; and**
 - (v) The meeting notes described in TDC 32.120(7).**
 - (h) A statement as to whether any City-recognized Citizen Involvement Organizations (CIOs) whose boundaries include, or are adjacent to, the subject property were contacted in advance of filing the application and, if so, a summary of the contact. The summary must include the date when contact was made, the form of the contact and who it was with (e.g. phone conversation with neighborhood association chairperson, meeting with land use committee, presentation at neighborhood association meeting), and the result;**
 - (i) Any additional information, as determined by the City Manager, that may be required by another provision, or for any other permit elsewhere, in the TDC, and any other information that may be required to adequately review and analyze the proposed development plan as to its conformance to the applicable criteria;**
- (2) Application Intake.** Each application, when received, must be date-stamped with the date the application was received by the City, and designated with a receipt number and a notation of the staff person who received the application.
- (3) Administrative Standards for Applications.** The City Manager is authorized to establish administrative standards for application forms and submittals, including but not limited to plan details, information detail and specificity, number of copies, scale, and the form of submittal

Finding:

The applicant submitted an application for PMA24-0004 on September 10, 2024. The application was deemed complete on October 2, 2024. The other general land use submittal requirements were included with the application submission. These criteria are met.

Section 32.150 - Sign Posting.

- (1) When Signs Posted.** Signs in conformance with these standards must be posted as follows:
 - (a) Signs providing notice of an upcoming neighborhood/developer meeting must be posted prior to a required neighborhood/developer meeting in accordance with Section 32.120(6); and**
 - (b) Signs providing notice of a pending land use application must be posted after land use application has been submitted for Type II, III and IV-A applications.**
- (2) Sign Design Requirements.** The applicant must provide and post a sign(s) that conforms to the following standards:
 - (a) Waterproof sign materials;**
 - (b) Sign face must be no less than eighteen (18) inches by twenty-four (24) inches (18" x 24"); and**
 - (c) Sign text must be at least two (2) inch font.**
- (3) On-site Placement.** The applicant must place one sign on their property along each public street frontage of the subject property. (Example: If a property adjoins four public streets, the applicant must place a sign at each of those public street frontages for a total of four signs). The applicant cannot place the sign within public right of way.
- (4) Removal.** If a sign providing notice of a pending land use application disappears prior to the final decision date of the subject land use application, the applicant must replace the sign within fortyeight

(48) hours of discovery of the disappearance or of receipt of notice from the City of its disappearance, whichever occurs first. The applicant must remove the sign no later than fourteen (14) days after:

- (a) The meeting date, in the case of signs providing notice of an upcoming neighborhood/developer meeting; or**
- (b) The City makes a final decision on the subject land use application, in the case of signs providing notice of a pending land use application.**

Finding:

The applicant provided certification, included as Exhibit G, that signs for the plan map amendment application in conformance with Tualatin Development Code Section 32.150 were placed on site. These criteria are met.

Section 32.160 – Completeness Review.

(1) Duration. Except as otherwise provided under ORS 227.178, the City Manager must review an application for completeness within 30 days of its receipt.

(2) Considerations. Determination of completeness will be based upon receipt of the information required under TDC 32.140 and will not be based on opinions as to quality or accuracy. Applications that do not respond to relevant code requirements or standards can be deemed incomplete. A determination that an application is complete indicates only that the application is ready for review on its merits, not that the City will make a favorable decision on the application.

(3) Complete Applications. If an application is determined to be complete, review of the application will commence.

(4) Incomplete Applications. If an application is determined to be incomplete, the City Manager must provide written notice to the applicant identifying the specific information that is missing and allowing the applicant the opportunity to submit the missing information. An application which has been determined to be incomplete must be deemed complete for purposes of this section upon receipt of:

- (a) All of the missing information;**
- (b) Some of the missing information and written notice from the applicant that no other information will be provided; or**
- (c) Written notice from the applicant that none of the missing information will be provided.**

(5) Vesting. If an application was complete at the time it was first submitted, or if the applicant submits additional required information within 180 days of the date the application was first submitted, approval or denial of the application must be based upon the standards and criteria that were in effect at the time the application was first submitted.

(6) Void Applications. An application is void if the application has been on file with the City for more than 180 days and the applicant has not provided the missing information or otherwise responded, as provided in subsection (4) of this section.

[...]

Finding:

The applicant submitted an application for PMA24-0004 on September 10, 2024. The application was deemed complete on October 2, 2024. These criteria are met.

TDC 32.240. - Type IV-A Procedure (Quasi-Judicial Review—City Council Public Hearing).

Type IV-A decisions are quasi-judicial decisions made by the City Council after a public hearing. A hearing under these procedures provides a forum to apply standards to a specific set of facts to determine whether the facts conform to the applicable criteria and the resulting determination will directly affect only a small number of identifiable persons. Except as otherwise provided, the procedures set out in this

section must be followed when the subject matter of the evidentiary hearing would result in a quasi-judicial decision. City Council decisions may be appealed to the state Land Use Board of Appeals pursuant to ORS 197.805—197.860.

(1) Submittal Requirements. Type IV-A applications must include the submittal information required by TDC 32.140(1).

(2) Determination of Completeness. After receiving an application for filing, the City Manager will review the application will for completeness in accordance with TDC 32.160.

(3) Written Notice of Public Hearing—Type IV-A. Once the application has been deemed complete, the City must mail by regular first class mail Notice of a Public Hearing to the following individuals and agencies no fewer than 20 days before the hearing.

(a) Recipients:

- (i) The applicant and, the owners of the subject property;**
- (ii) All property owners within 1,000 feet measured from the boundaries of the subject property;**
- (iii) All property owners within a platted residential subdivision that is located within 1,000 feet of the boundaries of the subject property. The notice area includes the entire subdivision and not just those lots within 1,000 feet. If the residential subdivision is one of two or more individually platted phases sharing a single subdivision name, the notice area need not include the additional phases;**
- (iv) All recognized neighborhood associations within 1,000 feet from the boundaries of the subject property;**
- (v) All designated representatives of recognized Citizen Involvement Organizations as established in TMC Chapter 11-9;**
- (vi) Any person who submits a written request to receive a notice;**
- (vii) Any governmental agency that is entitled to notice under an intergovernmental agreement entered into with the City and any other affected agencies, including but not limited to: school districts; fire district; where the project either adjoins or directly affects a state highway, the Oregon Department of Transportation; and where the project site would access a County road or otherwise be subject to review by the County, then the County; and Clean Water Services; Tri Met; and, ODOT Rail Division and the railroad company if a railroad-highway grade crossing provides or will provide the only access to the subject property. The failure of another agency to respond with written comments on a pending application does not invalidate an action or permit approval made by the City under this Code;**
- (viii) Utility companies (as applicable); and,**
- (ix) Members of the City Council.**

(b) The Notice of a Public Hearing, at a minimum, must contain all of the following information:

- (i) The names of the applicant(s), any representative(s) thereof, and the owner(s) of the subject property;**
- (ii) The street address if assigned, if no street address has been assigned then Township, Range, Section, Tax Lot or Tax Lot ID;**
- (iii) The type of application and a concise description of the nature of the land use action;**
- (iv) A list of the approval criteria by TDC section for the decision and other ordinances or regulations that apply to the application at issue;**
- (v) Brief summary of the local decision making process for the land use decision being made and a general explanation of the requirements for submission of testimony and the procedure for conduct of hearings;**
- (vi) The date, time and location of the hearing;**

(vii) Disclosure statement indicating that if any person fails to address the relevant approval criteria with enough detail, he or she may not be able to appeal to the Land Use Board of Appeals on that issue, and that only comments on the relevant approval criteria are considered relevant evidence;

(viii) The name of a City representative to contact and the telephone number where additional information may be obtained;

(ix) Statement that the application and all documents and evidence submitted to the City are in the public record and available for review, and that copies can be obtained at a reasonable cost from the City; and

(x) Statement that a copy of the staff report will be available for inspection at no cost at least seven days prior to the hearing and will be provided at reasonable cost.

(c) Failure of a person or agency to receive a notice, does not invalidate any proceeding in connection with the application, provided the City can demonstrate by affidavit that required notice was given.

(4) Additional Notice Requirements for Certain Type IV-A Application Types. The following additional notice requirements apply to Type IV-A Hearings where the City Council will be considering the application or removal of a Historic Landmark Designation or a Plan Text or Map Amendment for a particular property or discrete set of properties.

(a) The City Manager will notify in writing the Oregon Department of Land Conservation and Development (DLCD) in accordance with the minimum number of days required by ORS Chapter 197.

(b) At least 14 calendar days before the scheduled City Council public hearing date, public notice must be provided by publication in a newspaper of general circulation in the City.

(c) At least 14 calendar days before the scheduled City Council public hearing date, public notice must be posted in two public and conspicuous places within the City.

Finding:

The first evidentiary public hearing before the City Council will be held on December 9, 2024, and will follow the Quasi-Judicial review process. After submittal and completeness review as required by this section, a notice of public hearing for Type IV-A application for PMA24-0004 was mailed by city staff on October 9, 2024, and contained the information required by this section, as attached in Exhibit I. The Oregon Department of Land Conservation was notified prior to the 35-day notice period on October 9, 2024, attached in Exhibit I. Public notice has been provided in the Tualatin Times during the week of November 13, 2024, attached in Exhibit I. Public notice was posted in two public places within the City on October 9, 2024. Public comments are included in Exhibit L. These criteria are met.

(5) Conduct of the Hearing—Type IV-A.

The Mayor (or Mayor Pro Tem) must follow the order of proceedings set forth below. These procedures are intended to provide all interested persons a reasonable opportunity to participate in the hearing process and to provide for a full and impartial hearing on the application before the body. Questions concerning the propriety or the conduct of a hearing will be addressed to the chair with a request for a ruling. Rulings from the Mayor must, to the extent possible, carry out the stated intention of these procedures. A ruling given by the Mayor on such question may be modified or reversed by a majority of those members of the decision body present and eligible to vote on the application before the body. The procedures to be followed by the Mayor in the conduct of the hearing are as follows:

(a) At the commencement of the hearing, the Mayor (or designee) must state to those in attendance all of the following information and instructions:

- (i) The applicable approval criteria by Code Chapter that apply to the application;
 - (ii) Testimony and evidence must concern the approval criteria described in the staff report, or other criteria in the comprehensive plan or land use regulations that the person testifying believes to apply to the decision;
 - (iii) Failure to raise an issue with sufficient detail to give the City Council and the parties an opportunity to respond to the issue, may preclude appeal to the state Land Use Board of Appeals on that issue;
 - (iv) At the conclusion of the initial evidentiary hearing, the City Council must deliberate and make a decision based on the facts and arguments in the public record; and
 - (v) Any participant may ask the City Council for an opportunity to present additional relevant evidence or testimony that is within the scope of the hearing; if the City Council grants the request, it will schedule a date to continue the hearing as provided in TDC 32.240(5)(e), or leave the record open for additional written evidence or testimony as provided TDC 32.240(5)(f).
- (b) The public is entitled to an impartial decision body as free from potential conflicts of interest and pre-hearing ex parte (outside the hearing) contacts as reasonably possible. Where questions related to ex parte contact are concerned, members of the City Council must follow the guidance for disclosure of ex parte contacts contained in ORS 227.180. Where a real conflict of interest arises, that member or members of the City Council must not participate in the hearing, except where state law provides otherwise. Where the appearance of a conflict of interest is likely, that member or members of the City Council must individually disclose their relationship to the applicant in the public hearing and state whether they are capable of rendering a fair and impartial decision. If they are unable to render a fair and impartial decision, they must be excused from the proceedings.
- (c) Presenting and receiving evidence.
 - (i) The City Council may set reasonable time limits for oral presentations and may limit or exclude cumulative, repetitious, irrelevant, or personally derogatory testimony or evidence;
 - (ii) No oral testimony will be accepted after the close of the public hearing. Written testimony may be received after the close of the public hearing only as provided by this section; and
 - (iii) Members of the City Council may visit the property and the surrounding area, and may use information obtained during the site visit to support their decision, if the information relied upon is disclosed at the beginning of the hearing and an opportunity is provided to dispute the evidence.
- (d) The City Council, in making its decision, must consider only facts and arguments in the public hearing record; except that it may take notice of facts not in the hearing record (e.g., local, state, or federal regulations; previous City decisions; case law; staff reports). Upon announcing its intention to take notice of such facts in its deliberations, it must allow persons who previously participated in the hearing to request the hearing record be reopened, as necessary, to present evidence concerning the newly presented facts.
- (e) If the City Council decides to continue the hearing, the hearing must be continued to a date that is at least seven days after the date of the first evidentiary hearing (e.g., next regularly scheduled meeting). An opportunity must be provided at the continued hearing for persons to present and respond to new written evidence and oral testimony. If new written evidence is submitted at the continued hearing, any person may request, before the conclusion of the hearing, that the record be left open for at least seven days, so that he or she can submit additional written evidence or arguments in response to the new written evidence. In the

interest of time, after the close of the hearing, the decision body may limit additional testimony to arguments and not accept additional evidence.

(f) If the City Council leaves the record open for additional written testimony, the record must be left open for at least seven days after the hearing. Any participant may ask the decision body in writing for an opportunity to respond to new evidence (i.e., information not disclosed during the public hearing) submitted when the record was left open. If such a request is filed, the decision body must reopen the record, as follows:

(i) When the record is reopened to admit new evidence or arguments (testimony), any person may raise new issues that relate to that new evidence or testimony;

(ii) An extension of the hearing or record granted pursuant to this section is subject to the limitations of TDC 32.030(1) (ORS 227.178—120-day rule), unless the applicant waives his or her right to a final decision being made within 120 days of filing a complete application; and

(iii) If requested by the applicant, the City Council must grant the applicant at least seven days after the record is closed to all other persons to submit final written arguments, but not evidence, provided the applicant may expressly waive this right.

(6) Notice of Adoption of a Type IV-A Decision. Notice of Adoption must be provided to the property owner, applicant, and any person who provided testimony at the hearing or in writing. The Type IV-A Notice of Adoption must contain all of the following information:

(a) A description of the applicant's proposal and the City's decision on the proposal, which may be a summary, provided it references the specifics of the proposal and conditions of approval in the public record;

(b) The address or other geographic description of the property proposed for development, including a map of the property in relation to the surrounding area;

(c) A statement a statement that a copy of the decision and complete case file, including findings, conclusions, and conditions of approval, if any, is available for review and how copies can be obtained;

(d) The date the decision becomes final; and

(e) The notice must include an explanation of rights to appeal a City Council decisions to the state Land Use Board of Appeals pursuant to ORS 197.805—197.860.

(7) Effective Date of a Type IV-A Decision.

(a) The written order is the final decision on the application.

(b) The date of the order is the date it is mailed by the Mayor (or designee) certifying its approval by the decision body.

(c) Appeal of a IV-A City Council decision is to the State Land Use Board of Appeals pursuant to ORS 197.805—197.860.

Finding:

As a land use application requiring a Type IV-A procedure, an advisory recommendation was sought before the Tualatin Planning Commission prior to the City Council meeting. On November 20, 2024, the Tualatin Planning Commission voted unanimously to recommend approval of the Plan Map Amendment.

The City Council hearing will be conducted according to these requirements. Notice of Adoption of a Type IV-A Decision and any appeal will follow the requirements of this section. These criteria will be met.

Chapter 33: Applications and Approval Criteria

Section 33.070 Plan Amendments

(1) Purpose. To establish a process for the review of proposed amendments to the Zone Standards of the Tualatin Development Code and to the Text or the Plan Map of the Tualatin Comprehensive Plan.

(2) Applicability. Quasi-judicial amendments may be initiated by the City Council, the City staff, or by a property owner or person authorized in writing by the property owner. Legislative amendments may only be initiated by the City Council.

(3) Procedure Type.

(a) Map or text amendment applications which are quasi-judicial in nature (e.g. for a specific property or a limited number of properties) is subject to Type IV-A Review in accordance with TDC Chapter 32.

(4) Specific Submittal Requirements. An application for a plan map or text amendment must comply with the general submittal requirements in TDC 32.140 (Application Submittal).

Finding:

The proposed plan map amendment is quasi-judicial in nature and has been processed according to the Type IV-A procedures discussed above. These criteria are met.

(5) Approval Criteria.

(a) Granting the amendment is in the public interest.

Finding:

The proposed plan map amendment requests to rezone a total of 8.3-acres from Institutional (IN) zoning to Medium Low Density Residential (RML) zoning. The applicant's narrative stated the rezone to the RML zone would meet the diverse housing needs identified in Tualatin's Housing Needs Analysis (Exhibit J) and Housing Production Strategy (Exhibit K). The Housing Needs Analysis forecasted a greater need for relatively affordable attached housing such as townhomes. The Housing Production Strategy addressed the needs of households with moderate incomes (earning 80%-120% of Washington County's Median Family Income) through a strategy of developing smaller and more affordable housing units, such as cottage housing, which may provide opportunities for homeownership (without subsidy).

The proposed plan map amendment would allow for the future planned development of townhomes and cottage clusters under the Medium Low Density Residential Planning District. The applicant cited the gaps identified in the availability of housing for the increasing population of both first-time home buyers and empty nesters looking to downsize within the community. The HNA predicted a significant growth in the senior population which is expected to make up 24 percent of the overall population by 2040. The HNA also reported a relatively high proportion (26 percent) of residents under 20 years of age in Tualatin. Over the next 20 years, that population will range in age from 20 to 40 years old, and are predicted to prefer smaller, more affordable single-family homes in communities that are walkable. The proposed future housing development of townhomes and cottage clusters are considered more attainable for buyers with a range of income levels. The narrative stated that utilizing the 8.3-acre site to produce needed housing types would also offer economies of scale not available on smaller sites which would also further reduce the pressure of housing costs.

Comprehensive Plan goals and policies serve as the adopted expression of the public interest. As identified in Section D, above, the applicant has provided evidence that the proposed plan map amendment would satisfy several existing Comprehensive Plan policies and goals, and therefore provides the change would be in the public interest. This criterion is met.

(b) The public interest is best protected by granting the amendment at this time.

Finding:

The plan map amendment proposed to rezone the 8.3-acre subject site from Institutional (IN) to Medium Low Density Residential (RML) to support a planned development of townhomes and cottage clusters. A concept plan of the future development is included as Exhibit F. Page 22 of the narrative submitted by the applicant cited Tualatin's 2019 Housing Needs Analysis (Exhibit J) and 2021 Housing Production Strategy (Exhibit K) direction on housing needs from 2020-2040. The applicant described the housing prices and lending rates that have continued to rise dramatically, which emphasizes the need for attainably priced housing options.

The HNA reported the rate of homeownership in Tualatin is at 55% which is lower than the rate at the Washington County level at 61% and the Portland Region of 60%. The current options for homeownership that are smaller, relatively affordable and easier to maintain are limited in Tualatin. The applicant stated the plan map amendment would protect the public interest by providing the opportunity to achieve economies of scale and efficient site design to provide a significant number of housing units of needed diversity types to meet the needs of households with a variety of income levels.

Over the course of the year, the applicant team hosted an outreach process to engage residents within the site's vicinity. The narrative relayed that the participants of the outreach meetings had a strong interest in both townhome and cottage cluster development as attractive options for those who are downsizing and want to remain in this community. Materials from the applicant-led public engagement sessions are included in Exhibit G. This criterion is met.

(c) The proposed amendment is in conformity with the applicable objectives of the Tualatin Community Plan.

Finding:

As previously discussed in Section D, the plan map amendment – application of the Medium Low Density Residential (RML) zone to the subject property – has been identified by the applicant as being consistent with several existing goals and policies of the Comprehensive Plan. The plan map amendment also meets the same applicable goals and policies of the Tualatin Community Plan in that it allows for the application of the Medium Low Density Residential (RML) Planning District in a location that is considered buildable. This criterion is met.

(d) The following factors were consciously considered:

(i) The various characteristics of the areas in the City;

Finding:

Page 23 of the applicant's narrative (Exhibit A) addressed the various characteristics of the subject property. The 8.3-acre site is located within the city limits at the southern end of the Tualatin planning boundary. The site is located predominantly in a residential area. The land proposed for the plan map amendment is considered surplus acreage in the Institutional (IN) Planning District that is owned and occupied by the Horizon Community Church and School. The surrounding zoning is Medium Low Density Residential (RML) to the west, north and east. The one-acre parcel located within the overall future site development area (and sharing SW Norwood frontage) is also zoned Medium Low Density Residential (RML). The applicant concluded that the 8.3-acre subject site lends itself to the plan map amendment to the RML zoning for

consistency with the surroundings. This criterion is met.

(ii) The suitability of the areas for particular land uses and improvements in the areas;

Finding:

Within the submitted narrative (Exhibit A), the applicant addressed the suitability of this particular geographic area on page 23 for the proposed land use which would be a residential development mix of townhomes and cottage clusters. The applicant stated the 8.3-acre site is adjacent to Medium Low Density Residential (RML) properties and the proposed plan map amendment to rezone the site from Institutional (IN) to Medium Low Density Residential (RML) would be a compatible change. The narrative addressed the site's access to schools, parks, recreational facilities, and local commercial and employment areas by a variety of modes of travel. The subject site also has access to Interstate 5 and major employment centers in the region.

The applicant provided a Utility Availability Memorandum included as Exhibit E to address the proposed plan map amendment. The applicant noted nearby service and planned improvements to include water, sanitary sewer, stormwater, transportation and public transit. The services and improvements are reviewed in greater detail in Tualatin Development Code Section 33.070(5)(i). This criterion is met.

(iii) Trends in land improvement and development;

Finding:

The applicant's narrative (Exhibit A) stated the subject site is located near the southern border of the Tualatin's planning boundary. The 8.3-acre site is located near the Basalt Creek Planning area to the west which has been identified in the Housing Needs Analysis (Exhibit J) and Housing Production Strategy (Exhibit K) as an area that will accommodate a significant number of Tualatin's needed housing units over the next 20 years. Providing housing of various densities and levels of affordability are key housing needs addressed in Tualatin's HNA. The portion of the subject site proposed for rezoning is currently zoned Institutional (IN). Rezoning the 8.3-acres to Medium Low Density Residential (RML) would utilize surplus institutional land that is not needed by the church and will allow for future development of diverse housing types on the site. The applicant noted similar trends in the area including the development of the Autumn Sunrise subdivision located to the east, and the Plambeck Gardens multi-family affordable housing project to the southwest of the subject site. This criterion is met.

(iv) Property values;

Finding:

On page 24 of the narrative (Exhibit A), the applicant expressed the change in zoning designation of this area would continue to be compatible with the remaining IN zoned portion of the Church and School site and future development of the subject site will be required to meet applicable setbacks and buffers. As such, no significant changes in property values are anticipated. This criterion is met.

(v) The needs of economic enterprises and the future development of the area; needed right-of-way and access for and to particular sites in the area;

Finding:

The site is accessed by Norwood Road, an east-west Collector road that also serves surrounding properties

and provides access to SW Boones Ferry Road and Interstate 5. The Applicant has submitted a Transportation Planning Rule (TPR) analysis, attached as Exhibit C. The subject site would be close to future employment centers, such as the Basalt Creek Employment Area, and would provide the opportunity for employees to live nearer to their workplace. Any future development would be reviewed through the Architectural Review process to address specific right-of-way and access needs for the site development. This criterion is met.

- (vi) Natural resources of the City and the protection and conservation of said resources;**
- (vii) Prospective requirements for the development of natural resources in the City;**

Finding:

There are no mapped natural resources on the site affected by the plan map amendment. No physical development is proposed with this application for the plan map and text amendment. The subject site would be further examined for natural resources with future development of the site. Future development of the site would need to comply with local, regional, state, and federal requirements for the protection of air, water, and land resources. These criteria are met.

- (viii) The public need for healthful, safe, esthetic surroundings and conditions;**

Finding:

The proposed plan map amendment would change the subject site zoning and development standards from Institutional (IN) to Medium Low Density Residential (RML). The proposed rezone of the site would allow for the use of the proposed 90 units of townhomes and cottage clusters described in the submitted concept plan (Exhibit F). Future development of the site would need to comply with local, regional, state, and federal requirements for the protection of air, water, and land resources. No physical development is proposed under the plan map amendment. Future development applications would be reviewed for compliance against the Comprehensive Plan and Development Code at time of submittal.

Page 24 of the applicant's narrative (Exhibit A), stated the site is located within a residentially zoned area and would be compatible with the existing and planned residential development. The applicant noted there is also convenient access to parks and recreational facilities, goods and services, transit, and transportation routes to employment centers. This criterion is met.

- (ix) Proof of change in a neighborhood or area, or a mistake in the Plan Text or Plan Map for the property under consideration are additional factors to consider.**

Finding:

The applicant's narrative (Exhibit A) stated the proposed plan map amendment was not requested due to a change in the area or a mistake in the Plan Text or Plan Map. The applicant described the requested zone change would allow for the utilization of a surplus of Institutionally zoned land to provide diversity in the needed household types identified in Tualatin's Housing Needs Analysis and Housing Production Strategy. The diverse housing types of townhomes and cottage cluster homes are supported in the Medium Low Density Residential (RML) zone. This criterion is met.

- (e) If the amendment involves residential uses, then the appropriate school district or districts must be able to reasonably accommodate additional residential capacity by means determined by any affected school district.**

Finding:

The applicant submitted a Service Provider Letter from the Sherwood School District 88J included as Exhibit H. The Statement of Service Availability for Schools confirmed the school district service would be adequate to service the proposed future project of 90-95 single-family dwelling units.

City staff provided an email notice of public hearing and request for comment that was sent to the Sherwood School District and the Tigard Tualatin School District on October 9, 2024, included in Exhibit I. As of the date of writing this report, the City of Tualatin has not received any additional response from the school districts. This criterion is met.

(f) Granting the amendment is consistent with the applicable State of Oregon Planning Goals and applicable Oregon Administrative Rules, including compliance with the Transportation Planning Rule TPR (OAR 660-012-0060).

Finding:

The applicant proposed an amendment to the Comprehensive Plan and Zoning Map designation of the subject property as Tualatin is a single-map Comprehensive Plan/Zoning Map jurisdiction. The project proposed a plan map amendment for approximately 8.3 acres located at 23370 SW Boones Ferry Road (Tax Lot: 2S135D000106), which is currently zone Institutional (IN) and is proposed for rezoning to Medium Low Density Residential (RML).

The applicant provided a review of Oregon's Transportation Planning Rule (TPR) (OAR 660-012-0060) and a trip generation analysis by Lancaster Mobley included in Exhibit C. This standard was previously addressed in Section B. Oregon Administrative Rules. The TPR findings of OAR-012-0060 identified that subsection (a) and subsection (b) were not triggered as the functional classification of an existing or planned transportation system are not changed by the proposal. The standards for implementing a functional classification system are also not changed by the proposal.

The Transportation Planning Rule Analysis (Exhibit C) stated subsection (c) would not be triggered since reasonable worst-case development for the proposed zone change is estimated to generate fewer peak hour and daily trips than reasonable worst-case development options under the existing zoning. To understand the potential impacts of the requested zone change, the reasonable worst-case land uses under existing and proposed zoning were compared. Under the existing Institutional (IN) zoning, two scenarios were considered for the 8.3-acre site. One option was a 260-student private school. The other option was a 50,000-SF Community Center with a park that includes a sports field and tennis courts. The proposed Medium Low Density Residential (RML) Planning District would allow for a worst-case development of 207 townhomes. The existing zoning scenarios could generate a greater number of trips when compared to the proposed zoning during each peak hour and over an average weekday.

The level of travel and access will continue to be consistent with the functional classifications of the transportation system. Since potential peak hour volumes are lower with the proposed zoning, the change will not degrade the performance below what was anticipated under existing zoning. The TPR findings concluded that based on the comparison of reasonable worst-case trip generation, the existing and planned transportation system can accommodate the proposed zone change and the TPR criteria are satisfied. Therefore, no long-term analysis of traffic operations in the study area is warranted. This criterion is met.

(g) Granting the amendment is consistent with the Metropolitan Service District's Urban Growth Management Functional Plan.

Finding:

The proposed plan map amendment would not adversely impact the City's compliance with Titles 1-14 of the Metro Chapter 3.07, Urban Growth Management Functional Plan as discussed in Section C of these findings. This criterion is met.

(h) Granting the amendment is consistent with Level of Service F for the p.m. peak hour and E for the one-half hour before and after the p.m. peak hour for the Town Center 2040 Design Type (TDC Map 10-4), and E/E for the rest of the 2040 Design Types in the City's planning area.

Finding:

The 8.3-acre subject site is outside of the Town Center Design Type area. The applicant submitted a Transportation Planning Rule Review and a trip generation analysis provided in Exhibit E.

The Level of Service in relation to the proposed map amendment is expected to meet the City standards. The proposed plan map amendment will not alter the transportation needs of the affected parcels in Tualatin's Transportation System Plan. This criterion is met.

(i) Granting the amendment is consistent with the objectives and policies regarding potable water, sanitary sewer, and surface water management pursuant to TDC 12.020, water management issues are adequately addressed during development or redevelopment anticipated to follow the granting of a plan amendment.

[...]

Finding:

The submitted narrative stated the proposed future site development would be required to construct appropriate connections to the City's water system, sewer system and storm water management to adequately serve future uses. The applicant supplied a Utility Availability Report (Exhibit E) that demonstrated public water main, public sewer, and stormwater main lines are accessible from the subject site. The applicant included that a stormwater facility is planned for the southwest portion of the site. The future facility would be designed to meet Clean Water Services' stormwater design standards for water quality, flow control and hydromodification requirements.

Water: *A public water main exists within SW Norwood Road as demonstrated in the Utility Availability Report, attached as Exhibit X. This line will be extended into the site, with private laterals extending service to each lot.*

Sanitary Sewer: *The site has access to a public sewer line located to the northwest (Boones Ferry Road and Norwood Road) which will be extended through the site as demonstrated in the Utility Availability Report, attached as Exhibit F. Private laterals will be provided to extend service to each lot.*

Stormwater: *A public stormwater main line exists in SW Boones Ferry Road and can serve the subject site via a new stormwater easement.*

Future site development applications will be reviewed for compliance with the Tualatin Development Code and the City's Engineering design standards. This criterion is and can be met.

Chapter 41: Medium Low Density Residential Zone (RML)

Section 41.000 Purpose

The purpose of this zone is to provide household living uses with a variety of housing types at moderately low densities. This district is primarily oriented toward middle housing types including attached dwellings, multi-family development, and manufactured dwelling parks.

Finding:

The proposed plan map amendment would support the purpose of the RML zone. The submitted narrative (Exhibit A) stated the future development of residential homes including townhomes and cottage clusters would support the middle housing types described in the purpose statement including attached dwellings. The proposed amendment is consistent with the above purpose statement.

Section 41.200 Use Categories

- (1) **Use Categories.** Table 41-1 lists use categories Permitted Outright (P) or Conditionally Permitted (C) in the RML zone. Use categories may also be designated as Limited (L) and subject to the limitations listed in Table 41-1 and restrictions identified in TDC 41.210. Limitations may restrict the specific type of use, location, size, or other characteristics of the use category. Use categories which are not listed are prohibited within the zone, except for uses which are found by the City Manager or appointee to be of a similar character and to meet the purpose of this zone, as provided in TDC 31.070.
- (2) **Overlay Zones.** Additional uses may be allowed in a particular overlay zone. See the overlay zone Chapters for additional uses.

**Table 41-1
 Use Categories in the RML Zone**

USE CATEGORY	STATUS	LIMITATIONS AND CODE REFERENCES
RESIDENTIAL USE CATEGORIES		
Household Living	P/C	Permitted housing types subject to TDC 41.220.
Residential Accessory Uses	P (L)	Permitted uses limited to Family Child Care Home subject to ORS 329A.440.
Group Living	P/C (L)	Permitted uses limited to <ul style="list-style-type: none"> • Residential Facility; and, • Nursing Facility. Conditional uses limited to Congregate Care Facility subject to TDC 34.020 and TDC 34.030.
COMMERCIAL USE CATEGORIES		
Agriculture	C (L)	Subject to TDC 41.210(1).
Durable Goods Sales	C (L)	Conditional uses limited to nurseries.
Retail Sales and Service	C (L)	Conditional uses limited to Child Day Care Center.
INSTITUTIONAL USE CATEGORIES		
Assembly Facilities	C (L)	Conditional uses limited to places of religious worship. See TDC 34.800 Religious uses and ORS 227.500 pertaining to activities customarily associated with the practices of religious activity.
Community Services	C	

Medical Center	C (L)	Conditional uses limited to a hospital.
Schools	C	—
INFRASTRUCTURE AND UTILITIES USE CATEGORIES		
Basic Utilities	P/C (L)	Permitted uses limited to water or sewage pump stations and pressure reading stations. Conditional uses limited to water reservoirs, with a maximum height of 75 feet.
Greenways and Natural Areas	P	—
Parks and Open Areas	P/C (L)	Permitted uses limited to public park or playground. Conditional uses limited to golf course or country club with golf course.
Public Safety Facilities	C (L)	Conditional uses limited to fire stations
Transportation Facilities	P	—
Wireless Communication Facilities	P/C (L)	Subject to TDC 41.210(2). Maximum height and minimum setbacks subject to TDC Chapter 73F.

Section 41.220 Housing Types

Table 41-2 lists Housing Types permitted in the RML zone. Housing types may be Permitted Outright (P), Conditionally Permitted (C), or Not Permitted (N) in the RML zone.

**Table 41-2
 Housing Types in the RML Zone**

HOUSING TYPE	STATUS	LIMITATIONS AND CODE REFERENCES
Single-Family Dwelling	P	Limited to single-family dwellings in a flexible lot subdivision subject to TDC 36.410.
Accessory Dwelling Unit	P	Subject to TDC 73A.170.
Duplex	P	See TDC definition in 31.060.
Townhouse	P	See TDC definition in 31.060.
Triplex	P	See TDC definition in 31.060.
Quadplex	P	See TDC definition in 31.060.
Cottage Cluster	P	See TDC definition in 31.060.
Multi-Family Structure (5 or more units)	P	See TDC definition in 31.060.
Manufacturing Dwelling	N	See TDC definition in 31.060.
Manufactured Dwelling Park	P	Limited to locations designated by the Tualatin Community Plan Map and subject to TDC 34.190.
Retirement Housing Facility	C	Subject to TDC 34.400.
Residential Home	P	See TDC definition in 31.060.

Section 41.300 Development Standards

- (1) Development standards in the RML zone are listed in Table 41-3. Additional standards may apply to some uses and situations, see TDC 41.310 and TDC 41.330. The standards in Table 41-3 may be modified for greenway and natural area dedications as provided in TDC 36.420. The standards for lot size, lot width, building coverage, and setbacks that apply to single-family dwellings in small lot subdivisions are provided in TDC 36.410(2)(b).
- (2) *Exceptions.* Existing non-conforming situations may be developed according to the provisions of TDC Chapter 35.

**Table 41-3
 Development Standards in the RML Zone**

STANDARD	REQUIREMENT	LIMITATIONS AND CODE REFERENCES
MAXIMUM DENSITY		
Single Family Dwellings	10 units per acre	
Duplex	None	
Townhouse	25 units per acre	
Triplex	None	
Quadplex	None	
Cottage Cluster	None	Minimum density of 4 units per acre.
Multi-Family (5 or more units)	10 units per acre	
Manufactured Dwelling Parks	12 units per acre	Limited to single-wide dwelling parks or any part of a single-wide dwelling park.
Retirement Housing Facility, or Congregate Care Facility	15 units per acre	
Nursing Facility	15 units per acre	
Group Living Uses	15 units per acre	
MINIMUM LOT SIZE		
Single Family Dwelling	3,000 square feet	Only in a Flexible Lot Subdivisions, subject to TDC 36.410
Duplex	4,500 square feet	May be reduced for Flexible Lot Subdivisions, subject to TDC 36.410.
Townhouse	1,400 square feet	
Triplex	4,500 square feet	May be reduced for Flexible Lot Subdivisions, subject to TDC 36.410.
Quadplex	4,500 square feet	May be reduced for Flexible Lot Subdivisions, subject to TDC 36.410.
Cottage Cluster	4,500 square feet	May be reduced for Flexible Lot Subdivisions, subject to TDC 36.410.
Multi-Family Structure (5 or more units)	20,000 square feet	
Multi-Family Structure under Condominium Ownership	20,000 square feet	Limited to the primary condominium lot.
All Other Permitted Uses	10,000 square feet	

Conditional Uses	20,000 square feet	
Infrastructure and Utilities Uses	—	As determined through the Subdivision, Partition, or Lot Line Adjustment process
MINIMUM AVERAGE LOT WIDTH		
Single Family Detached	26 feet	Only allowed for Flexible Lot Subdivisions, subject to TDC 36.410.
Townhouse	14 feet	
Duplex, Triplex, Quadplex, and Cottage Clusters	50 feet	May be reduced to 30 feet if on a cul-de-sac. May be reduced to 26 feet for Flexible Lot Subdivisions, subject to TDC 36.410.
Multi-Family Structure	75 feet	May be 40 feet on a cul-de-sac street.
Multi-Family Structure under Condominium Ownership	100 feet	Limited to the primary condominium lot. Minimum lot width at street is 40 feet.
All Other Permitted Uses	75 feet	
Conditional Uses	100 feet	Minimum lot width at street is 40 feet.
Flag Lots	—	Must be sufficient to comply with minimum access requirements of TDC 73C.
MINIMUM SETBACKS		
Single Family Detached, Duplex, Townhouse, Triplex, or Quadplex		Single Family Detached only in Flexible Lot Subdivisions, subject to TDC 36.410.
Front	10 feet	
Garage Door	20 feet	
Side	5 feet	Zero-foot side setbacks permitted for lot or parcel lines where Townhouse units are attached.
Rear	10 feet	

Finding:

If the plan map amendment is approved the Medium Low Density Residential (RML) use categories, housing types and development standards would be applicable to the 8.3-acre site. The applicant has identified a proposed future development mix of townhomes and cottage cluster homes. Future site development applications will be reviewed for compliance with the Tualatin Development Code. The proposed amendment is consistent with the above standards.



Land Use Application

Project Information			
Project Title: The Norwood Project			
Brief Description: Comprehensive Plan Map Amendment and Rezone of 8.3 acres from IN to RML.			
Estimated Construction Value:			
Property Information			
Address: 9300 SW Norwood Road, Tualatin			
Assessor's Map Number and Tax Lot(s): Tax Map 2S135D, Tax Lot 00106 (8.3-acre portion)			
Applicant/Primary Contact			
Name: Ken Sandblast		Company Name: Westlake Consultants, Inc.	
Address: 15115 SW Sequoia Parkway, Suite 150			
City: Tigard		State: OR	ZIP: 97224
Phone: 503-684-0652		Email: ksandblast@westlakeconsultants.com	
Property Owner			
Name: KEN ALLEN			
Address: 23370 S.W. BOONES FERRY RD.			
City: TUALATIN		State: OR	ZIP: 97062
Phone: 503-519-4684		Email: KENALLENREURATY@GMAIL.COM	
Property Owner's Signature: <i>[Signature]</i>			Date: 6-20-24
<small>(Note: Letter of authorization is required if not signed by owner)</small>			

AS THE PERSON RESPONSIBLE FOR THIS APPLICATION, I HEREBY ACKNOWLEDGE THAT I HAVE READ THIS APPLICATION AND STATE THAT THE INFORMATION IN AND INCLUDED WITH THIS APPLICATION IN ITS ENTIRETY IS CORRECT. I AGREE TO COMPLY WITH ALL APPLICABLE CITY AND COUNTY ORDINANCES AND STATE LAWS REGARDING BUILDING CONSTRUCTION AND LAND USE.	
Applicant's Signature: <i>[Signature]</i>	Date: 6/20/24

Land Use Application Type:

- | | | |
|--|--|---|
| <input type="checkbox"/> Annexation (ANN)
<input type="checkbox"/> Architectural Review (AR)
<input type="checkbox"/> Architectural Review—Single Family (ARSF)
<input type="checkbox"/> Architectural Review—ADU (ARADU)
<input type="checkbox"/> Conditional Use (CUP) | <input type="checkbox"/> Historic Landmark (HIST)
<input type="checkbox"/> Industrial Master Plan (IMP)
<input checked="" type="checkbox"/> Plan Map Amendment (PMA)
<input type="checkbox"/> Plan Text Amendment (PTA)
<input type="checkbox"/> Tree Removal/Review (TCP) | <input type="checkbox"/> Minor Architectural Review (MAR)
<input type="checkbox"/> Minor Variance (MVAR)
<input type="checkbox"/> Sign Variance (SVAR)
<input type="checkbox"/> Variance (VAR)
<input type="checkbox"/> Other _____ |
|--|--|---|

Office Use		
Case No:	Date Received:	Received by:
Fee:	Receipt No:	



Memo

Date: October 12th, 2022

To: City of Tualatin, Planning Dept

From: Randy Cambell, Horizon Community Church

CC: Melissa Slotemaker, AKS Engineering

This letter is to serve the purpose of Horizon Community Church, authorizing Ken Allen, of Norwood Horizon Holdings, LLC as our official representative as pertaining to matters of land use and development of the proposed multifamily land approval process with the City of Tualatin.

Ken Allen has the authority to sign City of Tualatin, Washington County and Clean Water Services forms and applications on Horizon's behalf.

Sincerely, Randy Cambell

Executive Pastor
Horizon Community Church

The Norwood Project

Comprehensive Plan Map Amendment and
Rezone of 8.3 Acres to RML
23370 SW Boones Ferry Road, Tualatin, OR

Prepared For:

Norwood Horizon Holdings, LLC
16998 Greentree Ave.
Lake Oswego, OR 97034

Prepared By:

Westlake Consultants, Inc.
15115 SW Sequoia Parkway, Suite 150
Tigard, OR 97224

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- B. Site Concept Plan
- C. Pre-Application Notes
- D. Neighborhood/Developer Meeting Materials
- E. Transportation Planning Rule Analysis
- F. Utility Availability Report
- G. Sherwood School District SPL
- H. Title Report

I. Summary of Proposal

Applicant and Property Summary

Subject Property:	Tax Map 2S135D / Tax Lot 106 (8.3-acre portion)
Property Location:	23370 SW Boones Ferry Road Tualatin, OR 97062
Proposal:	Comprehensive Plan Map Amendment Rezone 8.3 acres from IN to RML
Site Size:	Approx. 8.3 acres
Zoning and Comprehensive Plan Designations:	Existing: Institutional (IN) Proposed: Medium-Low Density Residential (RML)
Applicant:	Norwood Horizon Holdings, LLC 16998 Greentree Ave Lake Oswego, OR 97034 Contact: Ken Allen Email: kenallenproperty@gmail.com
Property Owner:	Horizon Community Church 23370 SW Boones Ferry Road Tualatin, OR 97062
Applicant's Representative:	Ken Sandblast, AICP Westlake Consultants, Inc. 15115 SW Sequoia Pkwy., Ste. 150 Tigard, OR 97224 Phone: 503-684-0652

PROJECT OVERVIEW

Project Description

The Applicant, Norwood Horizon Holdings, LLC, proposes a Comprehensive Plan Amendment and Zone Change for an 8.3-acre portion of the site located at 23370 SW Boones Ferry Road in Tualatin, Oregon. The project site has a gross area of 9.3 acres. The site includes one acre of land zoned Medium-Low Residential (RML) that is surrounded on three sides by 8.3 acres of Institutional (IN) zoned land.

The 8.3-acre portion of the site proposed for rezoning from IN to RML zoning is currently owned by the Horizon Community Church, which also operates a school at that location. The area proposed for rezoning is surplus land that includes a parking lot and vacant land.

The proposed Comprehensive Plan Map Amendment and rezoning of 8.3 acres on the site, along with the existing one acre of RML-zoned land, will create a 9.3-acre RML-zoned site. As shown in the attached Site Concept Plan, Exhibit B, future redevelopment of the site is planned to include 90 units of housing, including Townhomes and Cottage Cluster homes.

Norwood Horizon Holdings, LLC, is a residential developer active in the metropolitan area and known for their collaborative approach to planning and development of residential neighborhoods. The company is dedicated to its core principles of sustainable development which include gathering community input and preferences, and balancing social needs, economic factors and respect for the natural environment.

Over the past year, the Applicant held five visioning sessions and the required Neighborhood/Developer meeting with members of the community and residents living near the site. These meetings provided an opportunity to share early concepts for residential development of the site and to receive valuable input from attendees. Over the course of these meetings, the project concept site planning has evolved to reflect the balancing of sustainable design, livability, and economics through a plan that includes a diversity of residential housing types.

The proposed concept for future development of the site under the proposed RML zoning includes a mix of townhomes and cottage cluster development. These housing types were identified as needed through the City's recently adopted Housing Needs Analysis and the Housing Production Strategy.

With Tualatin's established and documented housing needs for more affordable housing units and opportunities for attainable homeownership, the Applicant proposes this zone change as a significant opportunity to utilize a nine-acre site located within the City, with proximity to local commercial areas, educational and recreational facilities, and transit for a residential development that will deliver a diverse mix of housing types for current and future residents.

Partition Approval

The current property owner, Horizon Community Church, recently received approval through Case # PAR 22-0002 for a partition of the Church's site at 23370 SW Boones Ferry Road, creating two parcels and a tract. The existing Church and School facilities are located on Parcel 1. Parcel 2, at 8.3 acres, represents the Church's surplus acreage and is the subject site of this application for zone change, as shown below in Figure 1.

Figure 1. Partition Plat of Subject Property

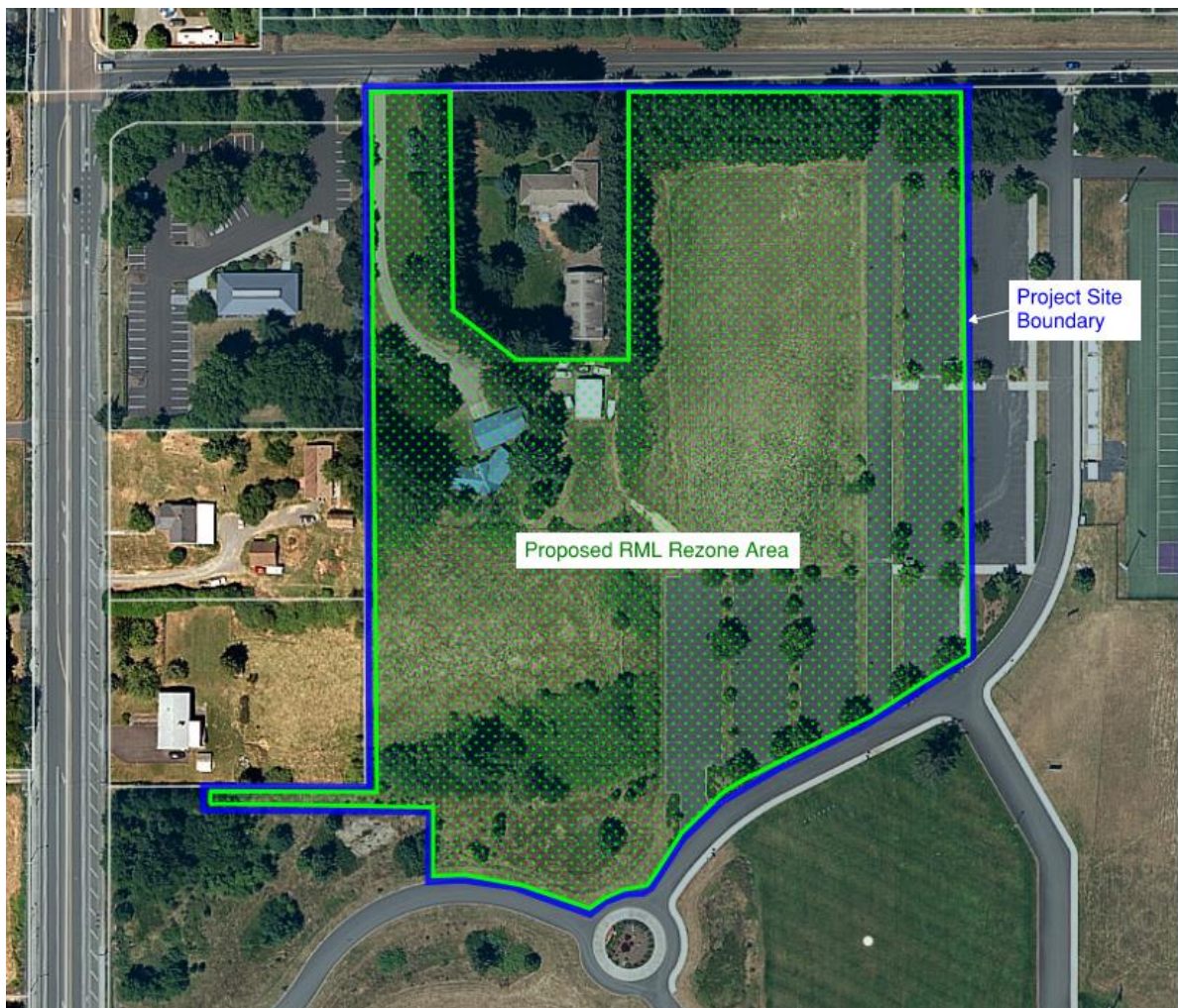


Existing Conditions

The subject site is located at 23370 SW Boones Ferry Road, Tualatin, near the City's southern boundary and adjacent to the Basalt Creek Planning Area to the south. The site was recently partitioned into two parcels through Case # PAR 22-0002. Parcel 1 contains the existing Church and School facilities, and Parcel 2 is mostly vacant. Parcel 2 is 8.3 acres in size and currently zoned IN, Institutional.

Existing improvements on the proposed rezone area (Parcel 2) include a single-dwelling residential home, and a paved parking area that serves the adjacent Horizon Community Church and School, as shown below in Figure 2.

Figure 2. Aerial – Subject Property



The site has frontage on—and access from—SW Norwood Road, which is classified as a Collector and provides access to SW Boones Ferry Road, a north-south Major Arterial, and nearby commercial areas, Interstate 5, and Wilsonville to the south.

The site is generally sloped from north to south and east to west. Located along the site's Norwood Road frontage is a large stand of mature evergreen trees. There is an existing sidewalk and open drainageway along the SW Norwood right-of-way frontage.

Adjacent Uses and Zoning

The subject property is 8.3 acres in size and is zoned IN Institutional on both the City's zoning map and Comprehensive Plan map

Figure 3. Map of Existing and Proposed Zoning



Land to the north, across Norwood Road, is zone RML and is developed with single-dwelling detached residential homes. The one-acre lot that is included in the overall 9.3-acre future development site is currently zoned RML and is surrounded on three sides by the IN-zoned area proposed for rezoning. The one-acre lot currently is occupied by a single-dwelling house.

Adjacent surrounding uses, in addition to the Horizon Community Church and School, include single-family and multi-family residential development. Currently under development, the Autumn Sunrise 400-lot subdivision is located east and south of the subject site, with Norwood Road frontage on its north boundary and Boones Ferry Road frontage at the southwest boundary. To the west of the subject site is the Bridge Church and two single-family detached homes on separate lots. To the southwest of the subject site, Plambeck Gardens, an affordable housing project with 116 units multi-family apartment project is under construction.

Utilities

Sanitary Sewer

The site has access to a public sewer line located to the northwest (Boones Ferry Road and Norwood Road) which will be extended through the site as demonstrated in the Utility Availability Report, attached as Exhibit F. Private laterals will be provided to extend service to each lot. Future site development applications will provide detailed plans demonstrating how the proposed development will be served by public sanitary sewer improvements that meet the City's Engineering design standards.

Water

A public water main exists in SW Norwood Road and is available to serve the subject site, as demonstrated in the Utility Availability Report, attached as Exhibit F. This line will be extended into the site, with private laterals extending service to each lot. Future site development applications will provide detailed plans demonstrating how the proposed development will be served by water improvements that meet the City's Engineering design standards.

Stormwater

Future development on the site will be required to include onsite stormwater facilities prior to discharging to an approved outfall location. The preliminary Site Concept Plan, attached as Exhibit B, shows a storm facility located in the southwest corner of the site. This facility will be designed to meet the Clean Water Services' stormwater design standards for water quality, flow control and hydromodification requirements. As shown in the Utility Availability Report, attached as Exhibit F, a public stormwater main exists in SW Boones Ferry Road and can serve the subject site.

Access

The subject property has frontage on—and direct access from—SW Norwood Road, the existing east-west public right-of-way on its northern boundary. Norwood Road is classified as a Collector street and is under the jurisdiction of both Tualatin and Washington County.

Traffic

As this proposal requests a Comprehensive Plan Amendment and Zone Change, the Applicant is required to comply with the Transportation Planning Rule (OAR 660-12-0060). The Applicant has addressed the Transportation Planning Rule (TPR) in the attached Exhibit E.

II. Tualatin Housing Information

BACKGROUND INFORMATION

It has been well-documented that Oregon's communities are facing a present and growing housing crisis. Years of underproduction of housing has pushed rents and housing prices to levels that are out of reach for many Oregonians.

With the passage of House Bill 2003 in 2019, Oregon's cities are required to address the growing housing problem and take measures to meet the diverse housing needs of their residents through a Housing Capacity Analysis and Housing Production Strategy. Tualatin formally accepted its Housing Needs Analysis in 2019, and the Housing Production Strategy was finalized in 2021. As Tualatin is located within the Portland Metro Boundary, the City must update these studies every six years.

The following is a summary of key takeaways from these analyses:

Tualatin Housing Needs Analysis

As required by Oregon Statewide Planning Goal 10, the Tualatin City Council updated their buildable lands inventory to support the City's Housing Needs Analysis (HNA), which was adopted in 2019. The analysis forecasts both housing and residential land needed over a 20-year planning horizon, from 2020 to 2040.

As noted in the Housing Needs Analysis, homeownership in Tualatin is increasingly challenging for new households and first-time home buyers, as well as the growing population of seniors and empty-nesters who want to down-size and remain in the community.

Highlights of the 2019 Tualatin Housing Needs Analysis include:

- Population growth within the City has been limited by the lack of residential land. Much of the new housing development over the next 20 years is expected to occur in the Basalt Creek area.

- Housing needed over the next 20 years (through 2040) is projected to be 1,014 new dwelling units and the needed units will be developed in the City as well as the Basalt Creek planning area.
- In forecasting the demand for different types of units through 2040, the HNA projects 40 percent of new housing will be single-family detached and 15 percent will be attached single-family.
- The rate of homeownership in Tualatin, at 55 percent, is lower than that of Washington County (61%) and the Portland Region (60%).
- Overall, approximately 37 percent of households in Tualatin are “cost burdened” and are paying 30 percent or more of their household income toward housing costs. Among households who own their homes, approximately 22 percent are currently cost burdened.
- Mirroring the regionwide trend, Tualatin’s household incomes have not risen at the same pace as rising housing prices. Tualatin’s median housing sale price increased 50 percent between 2015 and 2019. To address the growing gap between incomes and prices, the HNA concludes that Tualatin needs greater diversity of housing types that would be attainable at a range of income levels.
- Changes in the City’s demographic characteristics as well as economic trends influence future new housing. The HNA forecasts a greater need for relatively affordable attached housing—such as townhomes—and multi-family housing to address the forecasted demand among the growing senior population and new household formation by young adults.
- The HNA predicts significant growth in the senior population, which is expected to make up 24 percent of the overall population by 2040. Most retirees desire to remain in their community if possible, and retirees from outside the area may also be attracted to the area due to the location and amenities of the south Metro area.
- There is currently a relatively high proportion—26 percent—of residents under 20 years of age in Tualatin. Over the next 20 years, that population will range in age from 20 to 40 years old, and are predicted to prefer smaller, more affordable single-family homes in communities that are walkable.

Tualatin Housing Production Strategy

As required by ORS 197A.100, Tualatin adopted a Housing Production Strategy (HPS) in 2021. The HPS defines goals and strategic actions for addressing the needs identified in the Housing Needs Analysis. Encouraging the development of a wider variety of housing types to accommodate all income levels is among the strategic priorities of the HPS.

- As noted in the HPS, “development of smaller and more affordable housing units, such as cottage housing, may provide opportunities for homeownership (without subsidy) for households” with moderate incomes, earning 80 - 120% of Washington County’s Median Family Income. About 15 percent of Tualatin’s households fit into this category.
- Attached housing types, such as townhomes, are currently allowed in RML (medium-low density) zoned areas. As recommended in the 2019 HPS, cottage cluster development is now an allowed housing type in the RML zone, adding to the diversity of housing options in that zone that may be more attainable to middle-income households.

ZONE CHANGE APPROVAL SUMMARY

The Applicant’s proposal to rezone 8.3 acres of land from IN to RML addresses several of the housing needs identified in the City’s adopted HNA and HPS, including:

- More diversity of housing;
- Improved housing affordability and availability for homeowners;
- Providing housing for people to live and work in Tualatin.

In summary, this proposed Comprehensive Plan Map Amendment and Zone Change addresses those identified needs through:

Significant community engagement: The Applicant held five project visioning sessions, in addition to the required Neighborhood/Developer Meeting, with members of the community over the past year to discuss early concepts for the proposed rezone and development. This proposal reflects community input and support for the diverse types of housing proposed.

Provide needed housing: Provide, through future development, needed diverse housing types that are relatively affordable—including townhomes and cottage clusters, identified in the City’s HNA and HPS as options for attainable homeownership for newly formed households and downsizing seniors who desire to remain in the community.

Zoning Designation Consistency: Maintaining consistency with surrounding zoning designations. The 8.3 acre area will add to the one acre within the overall site already zoned

RML. In addition, land to the north and west of the subject site is zoned RML, and beyond the Horizon Community Church and School site, RML land lies to the east and south.

Locational factors: The project site is in close proximity to neighborhood services, such as parks, schools, and recreational facilities and is adjacent to residential areas with the same RML zoning. The site has convenient access via Boones Ferry Road and bus transit to nearby commercial areas in Tualatin and Wilsonville business districts, as well as access to I-5 and Metro area employment centers.

Site size: This proposed rezone of 8.3 acres will allow for the future development of 90 units of townhome and cottage cluster development, directly addresses identified needs for a significant number of housing units and a diversity of housing types attractive to a variety of household sizes and income levels. In addition, utilizing a large site to achieve economies of scale and higher residential density improves the project economics and lowers housing costs.

Anticipated Impact: The housing opportunity of this rezoning will be relatively high, given the City's limited supply and diversity of affordable housing types such as townhomes and cottage cluster homes.

III. Land Use Request

The Applicant is requesting a Comprehensive Plan Map Amendment and Zone Change from Institutional (IN) to Low-Medium Density Residential (RML) for an 8.3-acre site located at 23370 SW Boones Ferry Road.

The proposed zone change will support future housing development planned to include a mix of attached single-dwelling townhomes and cottage cluster homes. As shown in the attached Site Concept Plan, Exhibit B, together with the adjacent 1-acre lot currently zoned RML, the future development project is planned to include 90 units of needed housing.

IV. Applicable Regulations

The Applicant has reviewed the Tualatin Comprehensive Plan and Development Code, Statewide Planning Goals, Metro Regional Transportation Functional Plan, the Transportation Planning Rule (OAR 660-12-0060) and the City's pre-application meeting notes, and has identified the applicable goals, policies and code standards for this proposed Comprehensive Plan Amendment and Zone Change application. The applicable approval criteria are listed below, each followed by the Applicant's response.

Statewide Planning Goals

Goal 1 – Citizen Involvement

To develop a citizen involvement program that insures the opportunity for citizens to be involved in all phases of the planning process.

Applicant's Response: Per the City of Tualatin requirements, the Applicant hosted a Neighbor/Developer Meeting on April 17, 2024. All required materials are included in this submittal as Exhibit D.

In the months prior to the Neighbor/Developer Meeting, the Applicant and Project Team held five visioning sessions with community members to discuss the land use proposal, present early ideas and gather input. With that input, the project concept underwent several iterations, and the refined concept was presented at the April 17 Neighborhood/Developer meeting.

This application will be subject to the quasi-judicial review and decision process of TDC 32.240, including the required public notice, opportunity for public comment, and attendance at public hearings before the Planning Commission and City Council.

The proposed amendment is consistent with Goal 1.

Goal 2 – Land Use Planning

To establish a land use planning process and policy framework as a basis for all decision and actions related to use of land and to assure an adequate factual base for such decisions and actions.

Applicant’s Response: The applicable standards of the Tualatin Comprehensive Plan and the Tualatin Development Code have been addressed in this application. Per TDC 32.240, this application for Zone Change and Comprehensive Plan Map Amendment will be reviewed through the Type VI-A procedure.

The proposed amendment is consistent with Goal 2.

Goal 10 – Housing

To provide for the housing needs of citizens of the state.

Applicant’s Response: This application proposes a rezoning of 8.3 acres from the Institutional (IN) to Medium-Low Density Residential (RML) zone. With the proposed rezone, the zoning designation of the 8.3-acre area will be consistent with the remainder of the subject site and with the adjacent land to the west, north and east. The proposed rezone will allow for the planned development of the overall 9.3-acre site with 90 units of townhome and cottage cluster development.

As stated in the City’s HNA, demographic and economic trends, such as growth in the senior population and the number of new households, will translate into demand for relatively affordable attached single-family housing. In addition, the 2019 report recommends a wider variety of housing types, including cottage cluster development in the RML zone.

This proposal directly addresses these identified needs by providing a significant number of units with a variety of housing types, including attached townhome and cottage cluster development.

The proposal meets the intent of Goal 10.

Goal 11 – Public Facilities and Services

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.

Applicant’s Response: The proposed development will be required to construct appropriate connections to the City’s water, sanitary sewer, and stormwater management systems. The Utility Availability Report, attached as Exhibit F, demonstrates the availability of sanitary sewer, water, and stormwater systems to serve the subject site.

Through the engineering phase for future development of the site, detailed plans and calculations will demonstrate how the proposed development will be served by utility improvements that meet the City’s Engineering design standards.

The proposed amendment is consistent with Goal 11.

Goal 12 – Transportation

To provide and encourage a safe, convenient and economic transportation system.

Applicant’s Response: Goal 12 is implemented by the Transportation Planning Rule, OAR 660-012 (TPR). A TPR analysis is required to assess trip generation of existing versus proposed zoning to determine whether a proposed zone change will potentially generate more trips than existing zoning.

The Applicant has addressed the Transportation Planning Rule (TPR) in an analysis completed by Lancaster Mobley, attached as Exhibit E. In summary, the analysis shows that only the PM peak hour generates more trips and finds that in the AM peak hour, the rezone results in fewer trips. The analysis concludes, based on existing traffic and reasonable assumptions, that with a trip cap imposed on the site, the rezone would have no significant effect on the level of service.

The proposed amendment is consistent with Goal 12.

Goal 14 – Urbanization

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.

Applicant’s Response: The subject site is located within the City of Tualatin and is inside the Metro Urban Growth Boundary. As shown in the attached Site Concept Plan, Exhibit B, together with the adjacent 1-acre lot currently zoned RML, the future development project is planned to include 90 units of needed housing.

With the rezone of 8.3 acres, the overall site size of 9.3 acres presents an opportunity for economies of scale and efficient use of the site, while also creating a livable and pedestrian-friendly environment that incorporates and shared open space within the development.

In addition, the proximity of the site to existing neighborhood schools, recreational facilities, local commercial centers in Tualatin and Wilsonville, public transit, and access to I-5 and major employment centers contributes to the livability of this location.

The proposed amendment is consistent with Goal 14.

Metro Regional Functional Plan

Title 1: Housing Capacity

3.07.120 Housing Capacity

This provision required a city or county to maintain or increase its housing capacity.

Applicant's Response: The Applicant is requesting a Comprehensive Plan Amendment and zone change that will allow for residential medium-low density on 8.3 acres of land that is currently zoned for institutional uses. As such, this proposal will result in an increase in residential capacity.

Title 7: Housing Choice

3.07.730 Requirements for Comprehensive Plan and Implementing Ordinance Changes

Cities and counties within the Metro region shall ensure that their comprehensive plans and implementing ordinances:

(a) Include strategies to ensure a diverse range of housing types within their jurisdictional boundaries.

Applicant's Response:

The City's HNA forecasts housing needs for a range of housing types to meet the changing demographic and economic trends, including a growing senior population and new young household formation. Among the strategies of the City's HPS is the encouragement of a diversity of housing types that will be relatively more affordable to these and other households with moderate incomes. This proposal directly addresses those identified needs. As shown in the attached Site Concept Plan, Exhibit B, the future development project, including the proposed rezone site together with the adjacent 1-acre lot currently zoned RML, is planned to include 90 units of needed housing.

(b) Include in their plans actions and implementation measures designed to maintain the existing supply of affordable housing as well as increase the opportunities for new dispersed affordable housing within their boundaries.

Applicant's Response: The proposed rezoning of 8.3 acres from institutional zoning to medium-low density residential zoning will allow for development of relatively affordable housing types such as townhomes and cottage cluster homes, identified as needed housing types in the City's HNA and HPS.

The use of this large site provides an opportunity to achieve economies of scale and efficient site design not possible on a smaller site. The future planned development of townhomes and cottage cluster homes on the site will address the City's identified need for greater diversity of housing types that will be attainable at a variety of income levels.

(c) Include plan policies, actions, and implementation measures aimed at increasing opportunities for households of all income levels within their individual jurisdictions in affordable housing.

Applicant's Response: This proposal complies with the applicable policies of the City's Comprehensive Plan for increasing opportunities for households at all income levels. The proposed rezone will allow for a variety of attainable housing types, including cottage cluster units and townhomes, that will be more affordable to a range of household sizes and income levels.

Title 12: Protection of the Neighborhoods

3.07.1210 Purpose and Intent

...The purpose of Title 12 is to help implement the policy of the Regional Framework Plan to protect existing residential neighborhoods from air and water pollution, noise and crime and to provide adequate levels of public services.

Applicant's Response: With the requested zone change from IN to RML, the 8.3-acre site's zoning will be consistent with the surrounding zoning and single-dwelling residential development and will allow for provision of needed diverse housing types, including townhomes and cottage cluster homes.

The locational advantages and available services that enhance this area as a residential neighborhood and reduce the need for vehicular travel include its close proximity to neighborhood schools, churches, parks and recreational facilities, including the Tualatin Swim Center (.4 mi.) and Ibach Park (1.1mi). These destinations can be reached by multiple modes of travel.

The site also has convenient access via Norwood Road and Boones Ferry Road to nearby commercial areas in Tualatin, Sherwood and Wilsonville business districts, as well as access to Interstate 5.

Transportation Planning Rule – OAR 660 12-0060

Applicant's Response: The Applicant has addressed the Transportation Planning Rule (TPR) in an analysis completed by Lancaster Mobley, attached as Exhibit E.

Per the analysis, by capping trip generation for the 8.3-acre site, the proposed zone change would not result in a finding of significant effect. Therefore, no modifications to the City's TSP are needed and the conditions of TPR are satisfied.

Accordingly, the Applicant requests a Condition of Approval for this application that would place a cap on trips generated by future development on the site based on the recommendation in the analysis. Further, the Applicant requests that the Condition of Approval allow for removal of the trip cap in the event that the City adopts an updated TSP that includes a future traffic signal or roundabout at the intersection of SW Boones Ferry Road & Norwood Road.

Tualatin Comprehensive Plan

Chapter 1 – Community Involvement

POLICY 1.1.3 Conduct the planning process with adequate input and feedback from citizens in each affected neighborhood.

Applicant’s Response: Through an informal outreach process, the Applicant held five community visioning sessions during the past year to invite input from the surrounding neighbors and other interested parties.

Per the City of Tualatin’s code requirements, the Applicant held the required Neighborhood/Developer Meeting on April 17, 2024. All relevant documentation is included with this application as Exhibit D.

This application will be subject to the quasi-judicial review and decision process of TDC 32.240, including the required public notice, opportunity for public comment, and attendance at public hearings before the Planning Commission and City Council.

Chapter 3 – Housing

POLICY 3.1.1 DENSITY. Maintain a citywide residential density of at least eight (8) dwelling units per net acre.

Applicant’s Response: This application proposes rezoning 8.3 acres of the subject site from the IN zone to the RML residential zone, allowing new residential density on the site. Within the RML zone, maximum density varies based on the housing type. The Future residential development of the site will be consistent with this policy as it will not decrease citywide residential density.

POLICY 3.2.1 HOUSING TYPE DIVERSITY. Support development of townhomes, duplexes, triplexes, quadplexes, cottages, courtyard housing, accessory dwelling units, single story units, senior housing, and extended family and multi-generational housing in all residential zoning districts.

Applicant’s Response: The proposed rezone of the 8.3 acres to achieve the RML zoning on the entire subject site will allow for the future planned development of townhomes and cottage clusters. As noted in the HPS, housing types such as townhomes and cottage cluster homes are considered more attainable options for the growing populations of downsizing seniors and new households, as identified in the City’s HNA.

GOAL 3.5 HOUSING AND TRANSPORTATION. Encourage development and redevelopment in Tualatin that supports all modes of transportation, including walking, biking, and mass transit.

Applicant’s Response: The proposed amendment will allow for future residential development of the site with townhomes and cottage cluster homes, incorporating circulation for pedestrians and bicyclists and vehicles on-site as well as providing

connectivity to adjacent development and modes of transportation in the vicinity. The on-site street, as well as the frontage improvements on Norwood Road, will include sidewalks. The site has Trimet bus service at the intersection of SW Norwood Road and SW Boones Ferry Road, with service providing access to WES transit stop and the Tualatin Park and Ride transit center to the north, and to commercial employment centers in Tualatin and Wilsonville.

POLICY 3.7.1 ENVIRONMENTAL PROTECTION. Housing and residential growth policies will be evaluated for consistency with the environmental protection goals and policies of Chapter 7 (Parks, Open Space, and the Environment).

Applicant's Response: The subject site has no designated significant natural resources on the site. The proposed rezoning will allow for planned future development of a mix of townhomes and cottage cluster homes. As a requirement of cottage cluster development, a portion of the site will incorporate a common green open space. In addition, a portion of the site along the site's Norwood Road frontage is planned for preservation of a large stand of existing mature evergreen trees.

Chapter 7 of the Tualatin Comprehensive Plan calls for "conservation of natural resources and open space areas as well as the development of recreational areas and trails." The proposed amendment supports the purpose of Chapter 7 by supporting a walkable community through an on-site sidewalk system associated with the public street, as well as connections to the existing network of the surrounding area from Norwood Road. The City's Transportation System Plan includes planned pedestrian and bicycle upgrades—to include sidewalks and bicycle lanes—along SW Norwood Road, from SW Boones Ferry to the City's eastern boundary. The planned future development of the subject site will include frontage improvements along SW Norwood Road.

Chapter 8 – Transportation

GOAL 8.1 ACCESS AND MOBILITY. Maintain and enhance the transportation system to reduce travel times, provide travel time reliability, provide a functional and smooth transportation system, and promote access for all users.

Applicant's Response: The future development on the site is planned to include an on-site public street and sidewalk system. Along the Norwood Road frontage, improvements include sidewalks to connect to the existing off-site pedestrian network. In addition, the site is well located for access to schools, parks, recreational facilities, local commercial areas, as well as major employment centers in the region via Boones Ferry Road and Interstate 5.

A Transportation Planning Rule analysis prepared by Lancaster Mobley is attached as Exhibit E. In summary, the report concluded that, with a trip cap in place, the proposed zone change would not result in a finding of significant effect.

Chapter 9 – Public facilities and Services

Goal 9.1 Water: Provide safe, high-quality water to all customers.

Applicant's Response: Per the policies of this goal, the proposed development will be required to construct appropriate connections to the City's water system to adequately serve the future on-site development. A public water main exists within SW Norwood Road as demonstrated in the Utility Availability Report, attached as Exhibit F. This line will be extended into the site, with private laterals extending service to each lot. Future site development applications will provide detailed plans demonstrating how the proposed development will be served by water improvements that meet the City's Engineering design standards.

Goal 9.2 Sewer: Plan, construct and maintain a City sewer system that protects the public health, protects the water quality of creeks, ponds, wetlands and the Tualatin River, provides cost-effective sewer service, meets the demands of users, addresses regulatory requirements and supports all land uses.

Applicant's Response: Per Policy 9.2.4, the proposed development will be required to construct appropriate connections to the City's sanitary system to adequately serve the future on-site development.

The site has access to a public sewer line located to the northwest (Boones Ferry Road and Norwood Road) which will be extended through the site as demonstrated in the Utility Availability Report, attached as Exhibit F. Private laterals will be provided to extend service to each lot. Future site development applications will provide detailed plans demonstrating how the proposed development will be served by public sanitary sewer improvements that meet the City's Engineering design standards.

Goal 9.3 Provide a plan for routing surface drainage through the City, utilizing the natural drainages where possible...

Applicant's Response: Per the policies of this goal, the proposed development will be required to construct adequate stormwater conveyance, detention and treatment facilities on the subject site and to provide appropriate connections to the City's public stormwater system to adequately serve the future on-site development. For future site development, a stormwater facility is planned for the southwest portion of the site. This facility will be designed to meet the Clean Water Services' stormwater design standards for water quality, flow control and hydromodification requirements. As shown in the Utility Availability Report, attached as Exhibit F, a public stormwater main line exists in SW Boones Ferry Road and can serve the subject site via a new stormwater easement.

Chapter 10 – Land Use Designations & Zoning

Medium-Low Density Residential Planning District (RML) This district supports household living uses with a variety of housing types at moderately low densities. This district is primarily oriented toward middle housing types including attached dwellings, multi-family development, and manufactured dwelling parks.

Applicant's Response: The proposed rezoning of 8.3 acres from IN to RML will support the planned future development of the site with a mix of townhomes and cottage cluster homes, which are allowed housing types in the RML zone and are identified as needed housing types in the Tualatin HNA and HPS.

Institutional Planning District (IN) The purpose of this district is to provide an environment exclusively for, and conducive to, the development and operation of religious institutions, schools, public parks, and related uses, in a manner that is harmonious with adjacent and nearby residential, commercial, or manufacturing planning districts and uses. The district is intended to accommodate large-scale campus style developments, owned and operated by governmental or nonprofit entities, consisting of multiple structures or facilities, which may serve multiple purposes and provide multiple services to the community.

Applicant's Response: This application requests rezoning of 8.3 acres from IN to RML. The land proposed for rezoning is currently owned by the Horizon Community Church, which also operates a School on the site. The area proposed for the zone change is surplus land that includes vacant land and a parking area. The Church and School uses will continue to operate on the remainder of the Church-owned site following the proposed zone change of the subject property.

There is currently RML residential development under construction or planned on land that is adjacent to the east and south of the existing Horizon Community Church and School property. The proposed development of the subject property will be similarly compatible with Horizon's ongoing uses, and applicable setbacks and buffers will apply to future development of the residential site.

TUALATIN DEVELOPMENT CODE

Chapter 32 -- Procedures
32.010 Application Types and Review Procedures

Applicant's Response:
In satisfaction of Sections 32.010 and 33.020, a Zone Change and Comprehensive Plan Map Amendment shall be conducted as a Type IV-A procedure, with a quasi-judicial decision made by City Council following a public hearing, in accordance with Section 32.240.

In compliance with the provisions of *TDC 32.110*, the Applicant attended a Pre-Application Conference with the City of Tualatin on February 28, 2024. Documentation of the Pre-Application Conference is provided as Exhibit C, attached.

The Applicant hosted a Neighborhood/Developer Meeting in compliance with the provisions of *TDC 32.120* on April 17, 2024. Notice of the meeting was provided using a mailing list provided by the Tualatin Planning Department. Meeting documentation is provided as attached Exhibit D.

In satisfaction of application submittal requirements of *TDC 32.140*, this submittal includes a completed application form (Exhibit A) and applicable fee, this narrative addressing applicable criteria, supporting exhibits and documentation, a title report (Exhibit H), Neighborhood/Developer Meeting materials .

Addressing *TDC 32.140(1)(h)*, no separate contact was made with the Byrom CIO in advance of the required Neighborhood/Developer meeting. Mailed notice of the Neighborhood/Developer meeting held by the Applicant was sent to all recipients listed on the mailing list provided by the City of Tualatin Planning Department.

Neighborhood/Developer meeting signs were posted in compliance with *TDC 32.150*. Documentation of the Neighborhood Meeting is provided as Exhibit D, attached.

Per *TCD 32.150*, once the City has deemed this application complete, the Applicant will post notice of the proposed application for Zone Change/Comprehensive Plan Map Amendment on the frontage of the subject property.

Chapter 33 - Applications and Approval Criteria

33.070. - Plan Amendments

(2) Applicability. Quasi-judicial amendments may be initiated by the City Council, the City staff, or by a property owner or person authorized in writing by the property owner. Legislative amendments may only be initiated by the City Council.

Applicant's Response: This application for a quasi-judicial amendment is initiated by Norwood Horizon Holdings, LLC, who is under contract with the property owner, Horizon Church. Written authorization from the property owner has been provided with the Development Application, Exhibit A.

(3) Procedure Type.

(a) Map or text amendment applications which are quasi-judicial in nature (e.g. for a specific property or a limited number of properties) is subject to Type IV-A Review in accordance with TDC [Chapter 32](#).

(b) Map or text amendment applications which are legislative in nature are subject to Type IV-B Review in accordance with TDC [Chapter 32](#).

Applicant's Response: The Applicant acknowledges that this application will be subject to the Type IV-A Review procedures of *TDC 32.240*.

(4) Specific Submittal Requirements. An application for a plan map or text amendment must comply with the general submittal requirements in TDC 32.140 (Application Submittal).

Applicant's Response: This application package includes all applicable requirements as required by TDC 32.140, including applicable application forms, Neighborhood/Developer Meeting materials, fees, exhibits, and this narrative addressing applicable criteria and standards.

(5) Approval Criteria.

(a) Granting the amendment is in the public interest.

Applicant's Response: This application for the rezone of 8.3 acres from IN to RML zone district directly addresses a need for attainable housing that will meet diverse needs identified through the City's HNA and HPS. The requested rezone will allow for a future planned mix of townhome and cottage cluster development on the subject site.

The HNA and HPS identify housing gaps in availability of housing for growing populations of first-time home buyers and empty-nesters who would like to downsize within the community, as well as those who want to live and work in the City. The future proposed housing types, including townhomes and cottages, are considered to be more attainable by households with a range of income levels. Utilizing a large site to produce needed housing of these types also offers economies of scale not available on smaller sites—further reducing pressure on the housing costs.

(b) The public interest is best protected by granting the amendment at this time.

Applicant's Response: The City's HNA and HPS were finalized in 2019 and 2021, respectively, and those reports address housing needs over the 2020-2040 planning horizon. Since then, housing prices and lending rates have continued to rise dramatically, emphasizing the current need for attainable housing options.

Through the Applicant's outreach process involving six meetings over the past year, residents of the site's vicinity who participated in the meetings expressed strong interest in townhome and cottage cluster development as attractive options for those who are downsizing and want to remain in this community. Current options for ownership housing that is smaller, relatively affordable, and easier to maintain are extremely limited. The HNA and HPS also project a need for attainable housing for new households and those wishing to live and work in Tualatin.

With the rezoning of the 8.3 acres proposed in this application, the overall site will support a planned mix of townhouse and cottage cluster development, as shown in the attached Site Concept Plan, Exhibit B. The size of the site provides the opportunity to achieve economies of scale and efficient site design to provide a significant number of housing units of needed diverse types to meet the needs of households with a variety of income levels.

(c)The proposed amendment is in conformity with the applicable goals and policies of the Tualatin Comprehensive Plan.

Applicant's Response: Compliance with the goals and policies of the Tualatin Comprehensive Plan are addressed above in this narrative.

(d)The following factors were consciously considered:

(i)The various characteristics of the areas in the City;

Applicant's Response: The site is located within the city limits at the south end of Tualatin in a predominantly residential area. The 8.3 acres of land proposed for rezoning is surplus acreage on an Institutional (IN) zoned lot that is owned and occupied by the Horizon Community Church and School. The surrounding zoning is RML to the west, north and east. The one-acre parcel located within the overall future site development area (and sharing SW Norwood frontage) is also zoned RML. As such, the site lends itself to the RML zoning for consistency with its surroundings.

(ii)The suitability of the areas for particular land uses and improvements in the areas;

Applicant's Response: As noted above, the subject site is adjacent to RML zoned land on three sides and this request will ensure compatibility with the adjacent residential development. The site has convenient access to area schools, parks, recreational facilities, and local commercial and employment areas by a variety of modes of travel. The area also has convenient access to Interstate 5 and major employment centers in the region.

Through the Applicant's outreach to the community over the past year, community input indicated that attached housing and cottage cluster homes were desirable for this area and would help meet the demand for smaller, more attainable housing types attractive to seniors who want to downsize, as well as new households.

For these reasons, the subject site is well suited to RML uses that would be allowed through the proposed rezone.

(iii)Trends in land improvement and development;

Applicant's Response: The subject site is located near the southern border of the City, near the Basalt Creek Planning area to the south, which is identified in the City's HNA and HPS as an area that will accommodate a significant number of the City's needed housing units over the next 20 years. The portion of the subject site proposed for rezoning is currently zoned IN; rezoning the 8.3 acres to RML will utilize surplus institutional land that is not needed by the Church and will allow for future development of needed diverse housing types on the site.

Currently, the Autumn Sunrise development is under construction to the east of the site. That project plans for 400 units of detached residential development at build-out. In

addition, a 116-unit multi-family affordable housing project is under construction at a nearby site to the southwest of the subject site.

(iv)Property values;

Applicant's Response: The portion of the site proposed for rezone is adjacent to RML zoning to the north and west, and to the east and south beyond the Horizon property. The change in designation of this area will continue to be compatible with the remaining IN zoned portion of the Church and School site and future development of the subject site will be required to meet applicable setbacks and buffers. As such, no significant changes in property values are anticipated.

(v)The needs of economic enterprises and the future development of the area; needed right-of-way and access for and to particular sites in the area;

Applicant's Response: The site is accessed by Norwood Road, an east-west Collector road that also serves surrounding properties and provides access to SW Boones Ferry Road and Interstate 5. The Applicant has submitted a Transportation Planning Rule (TPR) analysis, attached as Exhibit E.

(vi)Natural resources of the City and the protection and conservation of said resources;

Applicant's Response: There are no designated significant natural resources on the site. This provision is not applicable.

(vii)Prospective requirements for the development of natural resources in the City;

Applicant's Response: There are no designated significant natural resources on the site. This provision is not applicable.

(viii)The public need for healthful, safe, esthetic surroundings and conditions; and

Applicant's Response: The proposed rezone of the site to RML will allow 90 units of townhome and cottage cluster development. The site is located within a residentially zoned area and, as proposed for RML zoning, will be compatible with the existing and planned residential development. In addition, there is convenient access to parks and recreational facilities, needed goods and services, transit, and transportation routes to employment centers.

(ix)Proof of change in a neighborhood or area, or a mistake in the Plan Text or Plan Map for the property under consideration are additional relevant factors to consider.

Applicant's Response: The proposed Comprehensive Plan Map amendment is not requested due to change in the area or a mistake in the Plan text or map. The requested zone change will allow for utilization of surplus IN zoned land to provide needed diverse housing for a variety of households identified in the City's HNA and HPS.

(e)If the amendment involves residential uses, then the appropriate school district or districts must be able to reasonably accommodate additional residential capacity by means determined by any affected school district.

Applicant's Response: The Applicant has submitted a Service Provider letter from the Sherwood School District confirming that service levels are adequate to accommodate future development of the site. The SPL is attached as Exhibit G.

(f)Granting the amendment is consistent with the applicable State of Oregon Planning Goals and applicable Oregon Administrative Rules, including compliance with the Transportation Planning Rule TPR (OAR 660-012-0060).

Applicant's Response: The Applicant has addressed the Transportation Planning Rule TPR (OAR 660-012-0060) in the TPR Analysis memo, attached as Exhibit E.

(g)Granting the amendment is consistent with the Metropolitan Service District's Urban Growth Management Functional Plan.

Applicant's Response: The Applicant has herein above addressed applicable provisions of the Metro Regional Functional Plan above, including Title 1 – Housing Capacity, Title 7 – Housing Choice, and Title 12 – Protection of Residential Neighborhoods.

(h)Granting the amendment is consistent with Level of Service F for the p.m. peak hour and E for the one-half hour before and after the p.m. peak hour for the Town Center 2040 Design Type (Comprehensive Plan Map 10-4), and E/E for the rest of the 2040 Design Types in the City's planning area.

Applicant's Response: As shown in the results of the attached Transportation Planning Rule Analysis, Exhibit E, this amendment is consistent with this criterion.

(i)Granting the amendment is consistent with the objectives and policies regarding potable water, sanitary sewer, and surface water management pursuant to applicable goals and policies in the Tualatin Comprehensive Plan, water management issues are adequately addressed during development or redevelopment anticipated to follow the granting of a plan amendment.

Applicant's Response: Goals 9.1 (Water), 9.2 (Sewer) and 9.3 (Surface Water Management), are addressed in the Comprehensive Plan section of this narrative, above. As noted, a Utility Availability Report is attached as Exhibit F and addresses potential connections to existing public facilities for sanitary sewer, water, and stormwater.

As per the Site Concept Plan, attached as Exhibit B, this proposed amendment and zone change will support planned future development of 90 units of townhome and cottage cluster development. In conjunction with any development application, detailed calculations will be provided through the engineering phase for the proposed development. This standard is met.

(j)The applicant has entered into a development agreement. This criterion applies only to an amendment specific to property within the Urban Planning Area (UPA),

also known as the Planning Area Boundary (PAB), as defined in both the Urban Growth Management Agreement (UGMA) with Clackamas County and the Urban Planning Area Agreement (UPAA) with Washington County.

Applicant's Response: The subject property is not located within a UPA. This provision is not applicable.

Chapter 41 Medium Low Density Residential Zone (RML)

Applicant's Response: The proposed rezone of 8.3 acres from Institutional (IN) to Medium Low Density Residential Zone (RML) will support the future development of residential homes including townhomes and cottage cluster development, both of which are permitted housing types in the RML zone. This provision is satisfied.

Chapter 49 Institutional Zone (IN)

Applicant's Response: Following the proposed rezone of the 8.3-acre subject site, the existing Horizon Community Church and School will continue operating on the remaining IN zoned land. Both uses, religious assembly and school, are permitted uses in the IN zone.

V. Conclusion

The Applicant has submitted substantial evidence demonstrating that the proposed application for Comprehensive Plan Map Amendment and Zone Change of 8.3 acres from IN to RML is in compliance with all applicable standards. The Applicant respectfully requests City of Tualatin approval of this proposed Comprehensive Plan Map Amendment and Zone Change.

The site is generally sloped from north to south and east to west. Located along the site's Norwood Road frontage is a large stand of mature evergreen trees. There is an existing sidewalk and open drainageway along the SW Norwood right-of-way frontage.

Adjacent Uses and Zoning

The subject property is 8.3 acres in size and is zoned IN Institutional on both the City's zoning map and Comprehensive Plan map

Figure 3. Map of Existing and Proposed Zoning





lancaster
moble

Norwood Development

Transportation Planning Rule Analysis

Tualatin, OR

Date:

Revised October 28, 2024

Prepared for:

Ken Allen, Heitman Allen Real Estate & Construction
Westlake Consultants, Inc

Prepared by:

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RENEWS: 12/31/2025

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Executive Summary

1. The Norwood Development project proposes a zone change for approximately 8.3 acres of Tax Lot 2S135D 000106, which is currently zone Institutional (IN) and is proposed for rezoning to Medium Low Density Residential (RML).
2. To understand the potential impacts of the requested zone change, the reasonable worst-case land uses under existing and proposed zoning were compared.
 - Under the existing institutional (IN) zoning, two scenarios were considered for the 8.3-acre site. One option was a 260-student private school. The other option was a 50,000-SF Community Center with a park that includes a sports field and tennis courts.
 - The proposed medium-density residential zoning (RML) would allow for a worst-case development of 207 townhomes.
3. The existing zoning scenarios could generate a greater number of trips when compared to the proposed zoning during each peak hour and over an average weekday.
4. Based on this comparison of reasonable worst case trip generation, the existing and planned transportation system can accommodate the proposed zone change and the TPR criteria are satisfied. Therefore, no long-term analysis of traffic operations in the study area is warranted.



Project Description

Introduction

The Norwood Development project proposes a zone change for approximately 8.3 acres of Tax Lot 2S135D 00106, which is currently zone Institutional (IN) and is proposed for rezoning to Medium Low Density Residential (RML). This memorandum details the trip generation associated with the current and proposed zoning and evaluates the criteria of the Oregon Transportation Planning Rule. Detailed information on trip generation calculations and included as attachments to this report.

Location Description

The project site (Tax Lot 2S135D 000106) encompasses approximately 8.3 acres and is located east SW Boones Ferry Road, and south of SW Norwood Road. It is currently developed with a single-family home, and a parking lot with approximately 212 striped spaces serving the Horizon Community Church. The existing zoning designation is Institutional (IN) and is proposed to be rezoned to Medium Low Density Residential (RML). The site is surrounded by institutional uses to the east, south and west, and residential uses to the north. Figure 1 presents an aerial image of the nearby vicinity with the project site outlined in yellow.



Figure 1: Project Location (City of Tualatin Interactive Zoning Map)



Trip Generation

The Transportation Planning Rule (TPR) is in place to ensure that the transportation system can support possible increases in traffic intensity that could result from changes to adopted plans and land-use regulations. The TPR requires an analysis of a reasonable worst-case development scenario of the site under existing and proposed zoning.

The project site currently has IN zoning while the proposed zoning is RML. Reasonable worst-case development scenarios under the existing and proposed zoning are described below.

Existing Zoning Assumptions

The Tualatin Development Code (TDC) describes allowed uses under the IN zoning in Chapter 49. In considering development scenarios for the TPR analysis, only permitted uses in the zone were considered.

For Lot 106 with IN zoning, allowed uses include assembly facilities (limited to places of religious worship), community services (limited to public facilities such as community recreation buildings or indoor aquatic centers), schools, and government offices. Allowed infrastructure uses include government-owned parks, sports fields, and tennis courts. The adjacent site to the west already includes a church and the remainder of the parcel will include a sanctuary/place of assembly; therefore, another church was not considered a reasonable option. Neither was a government office as research of potential uses shows these buildings tend to have smaller sites that are more centrally located within a community. Therefore, two options were selected as part of the reasonable worst-case analysis:

- School
- Community recreation center with adjacent public park facilities

The TDC does not describe density requirements for either of these uses.

Potential School

The TDC does not describe density requirements for the school. A review of public schools in the Sherwood and Tigard-Tualatin School Districts shows that 8.3 acres is likely too small for a public school; however, the site could be developed with a private school. To estimate school size, the density of approximately 31 students per acre from the site's original annexation analysis was used. Based on this rate, a school accommodating approximately 260 students could be developed. Since the rest of lot 106 contains the Horizon Christian School, which is a private high school, the 8.3-acre portion considered in this analysis was assumed to be a kindergarten through 8th Grade (K-8) private school.

Potential Community Center

To provide a reasonable estimate of building size and facilities, a survey of other sites was conducted for a community recreation center. Three sites on the west side of the Portland metropolitan area were considered because the size of both the buildings and the lots could be determined:

1. The Southwest Community Center is part of Portland Parks and Recreation. The building is listed at 47,014 square feet (SF) on approximately 4.5 acres. The site is part of Gabriel Park, which has outdoor

facilities, including tennis courts, a skate park, an off-leash dog park, sports fields, picnic sites, and walking trails.

2. The Conestoga Recreation and Aquatic Center is part of Tualatin Hills Parks and Recreation District (THPRD). The building is listed at 56,043 SF on approximately 4.9 acres. The site abuts Southridge High School in Beaverton.
3. The Cedar Hills Recreation Center is also part of THPRD. The building is estimated at 38,330 SF on approximately 3.88 acres. The site includes a baseball field adjacent to the building. Additional fields and tennis courts are located across the street. The site is located in Beaverton.

While both the buildings and the lots where the buildings are located are relatively close in size, the abutting facilities vary significantly. Therefore, the building size was used as the basis for estimating a reasonable size for a community recreation center on the subject site. The average size of the three buildings is 47,130 SF; therefore, a recreation center totaling 50,000 square feet was assumed as a reasonable worst case.

Even with a community center occupying 4 to 5 acres of the 8.3-acre parcel, the site is large enough to include park land that could accommodate other public facilities such as a playground, as well as tennis courts and/or sports (soccer/lacrosse/baseball) fields. For this analysis, the park was assumed to include one (1) sports field and four (4) tennis courts. Although both Tualatin High School and the Horizon School include nearby full-size football/sports fields, a sports field accommodating youth programs (weekday practices and weekend games) would be a reasonable use. Tualatin High School also has tennis courts but additional tennis courts, or possibly pickleball courts, would also serve the community. Any other facilities, such as picnic tables or a play structure, incorporated into the park are assumed to serve the adjacent neighborhood and to be very low vehicle trip generators.

Proposed Zoning Assumptions

The Tualatin Development Code (TDC) describes allowed uses under RML zoning in Chapter 41. For the proposed RML zoning, residential development is the only permitted use that will generate significant traffic. TDC Table 41-3 describes the permitted densities for different types of residential development. As a worst-case scenario evaluation, the entire site is considered to be developable without regard to trees or other natural features that may be desirable to preserve with an actual development proposal.

Two scenarios were selected for consideration under a reasonable worst-case analysis:

- Single-Family Dwellings at 10 units/acre – Assuming maximum density can be achieved, the site could accommodate 83 single-family homes.
- Townhouses at 25 units/acre – Assuming maximum density can be achieved, the site could accommodate 207 townhomes.

Trip Generation Comparison

To estimate trips that will be generated by the redevelopment, trip rates from the *Trip Generation Manual*¹ were used based on the number of dwelling units (DU) and number of students. The land use assumptions and trip generation estimates are summarized in Table 1.

Table 1: Trip Generation – Reasonable Worst Case Scenarios

Land Use (Code)	Intensity	Morning Peak Hour			Evening Peak Hour			Weekday Trips
		In	Out	Total	In	Out	Total	
Existing Zoning Options								
Private School: K-8 (530)	260 Students	147	116	263	31	37	68	1,068
Recreational Community Center (495)	50,000 SF	63	33	96	59	66	125	1,442
Park - Soccer Field (488)	1 Field	1	0	1	11	5	16	72
Park - Tennis Courts (490)	4 Courts	NA	NA	NA	9	8	17	122
Subtotal Community Center + Park		64	33	97	79	79	158	1,636
Proposed Zoning Options								
Single-Family Detached Housing (210)	83 DU	16	47	63	52	31	83	850
Single-Family Attached Housing (210)	207 DU	32	70	102	68	52	120	1,516
Net Trip Difference								
Single-Family Attached Housing – Private K-8 School		-115	-46	-161	37	15	52	448
Single-Family Attached Housing – Community Center + Park		-32	37	5	-11	-27	-38	-120

Two combined worst-case scenarios are highlighted under the existing zoning. One assumes a 260-student private school (kindergarten through 8th grade). The other assumes a 50,000-SF recreation center with one (1) sports field and four (4) tennis courts in an adjacent park.

The townhome scenario will generate more trips than the single-family home scenario; therefore, this option was used as the basis of the proposed zoning trip generation analysis.

¹ Institute of Transportation Engineers (ITE), *Trip Generation Manual*, 11th Edition, 2021.

Morning Peak Hour

During the morning peak hour, development of the site with a school under the existing zoning would generate more trips than any other zoning scenario, existing or proposed. Under the proposed zoning, the single-family attached housing could generate 161 fewer morning peak hour trips than existing zoning.

Since the existing zoning has a reasonable potential to generate more trips than the proposed zoning, rezoning will not adversely affect the transportation system.

Evening Peak Hour

During the evening peak hour, development of the site with a community center and park under the existing zoning would generate more trips than any other zoning scenario, existing or proposed. Under the proposed zoning, the single-family attached housing could generate 38 fewer evening peak hour trips than existing zoning.

Since the existing zoning has a reasonable potential to generate more trips than the proposed zoning, rezoning will not adversely affect the transportation system.

Daily Trip Generation

Similar to the evening peak hour, development of the site with a community center and park under the existing zoning would generate more trips than any other zoning scenario, existing or proposed. Under the proposed zoning, the single-family attached housing could generate 120 fewer weekday trips than existing zoning.

Since the existing zoning has a reasonable potential to generate more trips than the proposed zoning, rezoning will not adversely affect the transportation system.



Transportation Planning Rule Findings

The applicable elements of the TPR are each quoted directly in italics below, with responses following.

660-012-0060

(1) *If an amendment to a functional plan, an acknowledged comprehensive plan, or a land use regulation (including a zoning map) would significantly affect an existing or planned transportation facility, then the local government must put in place measures as provided in section (2) of this rule, unless the amendment is allowed under section (3), (9) or (10) of this rule. A plan or land use regulation amendment significantly affects a transportation facility if it would:*

(a) *Change the functional classification of an existing or planned transportation facility (exclusive of correction of map errors in an adopted plan);*

Response: Subsection (a) is not triggered because the functional classification of an existing or planned transportation facility is not changed by the proposal.

(b) *Change standards implementing a functional classification system; or*

Response: Subsection (b) is not triggered because the standards for implementing a functional classification system are not changed by the proposal.

(c) *Result in any of the effects listed in paragraphs (A) through (C) of this subsection. If a local government is evaluating a performance standard based on projected levels of motor vehicle traffic, then the results must be based on projected conditions measured at the end of the planning period identified in the adopted TSP. As part of evaluating projected conditions, the amount of traffic projected to be generated within the area of the amendment may be reduced if the amendment includes an enforceable, ongoing requirement that would demonstrably limit traffic generation, including, but not limited to, transportation demand management. This reduction may diminish or completely eliminate the significant effect of the amendment.*

(A) *Types or levels of travel or access that are inconsistent with the functional classification of an existing or planned transportation facility;*

(B) *Degrade the performance of an existing or planned transportation facility such that it would not meet the performance standards identified in the TSP or comprehensive plan; or*

(C) *Degrade the performance of an existing or planned transportation facility that is otherwise projected to not meet the performance standards identified in the TSP or comprehensive plan.*

Response: Subsection (c) would not be triggered since reasonable worst-case development for the proposed zone change is estimated to generate fewer peak hour and daily trips than reasonable worst-case development options under the existing zoning. The level of travel and access will continue to be consistent with the functional classifications of the transportation system. Since potential peak hour volumes are lower with the proposed zoning, the change will not degrade the performance below what was anticipated under existing zoning.

Conclusion

Based on this comparison of reasonable worst case trip generation, the existing and planned transportation system can accommodate the proposed zone change and the TPR criteria are satisfied. Therefore, no long-term analysis of traffic operations in the study area is warranted.



Conclusions

Key findings of this study include:

- To understand the potential impacts of the requested zone change, the reasonable worst-case land uses under existing and proposed zoning were compared.
 - Under the existing institutional (IN) zoning, two scenarios were considered for the 8.3-acre site. One option was a 260-student private school. The other option was a 50,000-SF Community Center with a park that includes a sports field and tennis courts.
 - The proposed medium-density residential zoning (RML) would allow for a worst-case development of 207 townhomes.
- The existing zoning scenarios could generate a greater number of trips when compared to the proposed zoning during each peak hour and over an average weekday.
- Based on this comparison of reasonable worst case trip generation, the existing and planned transportation system can accommodate the proposed zone change and the TPR criteria are satisfied. Therefore, no long-term analysis of traffic operations in the study area is warranted.



Appendix

- Trip Generation Calculations





TRIP GENERATION CALCULATIONS
 Source: Trip Generation Manual, 11th Edition

<i>Land Use:</i>	Private School (K-8)
<i>Land Use Code:</i>	530
<i>Land Use Subcategory:</i>	All Sites
<i>Setting/Location</i>	General Urban/Suburban
<i>Variable:</i>	Students
<i>Trip Type:</i>	Vehicle
<i>Formula Type:</i>	Rate
<i>Variable Quantity:</i>	260

AM PEAK HOUR

Trip Rate: 1.01

	Enter	Exit	Total
Directional Split	56%	44%	
Trip Ends	147	116	263

PM PEAK HOUR

Trip Rate: 0.26

	Enter	Exit	Total
Directional Split	46%	54%	
Trip Ends	31	37	68

WEEKDAY

Trip Rate: 4.11

	Enter	Exit	Total
Directional Split	50%	50%	
Trip Ends	534	534	1,068

SATURDAY

Trip Rate: 0

	Enter	Exit	Total
Directional Split	50%	50%	
Trip Ends	NA	NA	NA

Caution: Small Sample Size



TRIP GENERATION CALCULATIONS
 Source: Trip Generation Manual, 11th Edition

Land Use: Soccer Complex
 Land Use Code: 488
 Land Use Subcategory: All Sites
 Setting/Location: General Urban/Suburban
 Variable: Fields
 Trip Type: Vehicle
 Formula Type: Rate
 Variable Quantity: 1

WARNING: Variable Quantity is less than Minimum Survey Size for Peak Hours

AM PEAK HOUR

Trip Rate: 0.99

	Enter	Exit	Total
Directional Split	61%	39%	
Trip Ends	1	0	1

PM PEAK HOUR

Trip Rate: 16.43

	Enter	Exit	Total
Directional Split	66%	34%	
Trip Ends	11	5	16

WEEKDAY

Trip Rate: 71.33

	Enter	Exit	Total
Directional Split	50%	50%	
Trip Ends	36	36	72

SATURDAY

Trip Rate: 404.88

	Enter	Exit	Total
Directional Split	50%	50%	
Trip Ends	202	202	404

Caution: Small Sample Size



TRIP GENERATION CALCULATIONS
 Source: Trip Generation Manual, 11th Edition

Land Use: Tennis Courts
Land Use Code: 490
Land Use Subcategory: All Sites
Setting/Location: General Urban/Suburban
Variable: Tennis Courts
Trip Type: Vehicle
Formula Type: Rate
Variable Quantity: 4

AM PEAK HOUR

Trip Rate: 0

	Enter	Exit	Total
Directional Split	0%	0%	
Trip Ends	NA	NA	NA

PM PEAK HOUR

Trip Rate: 4.21

	Enter	Exit	Total
Directional Split	50%	50%	
Trip Ends	9	8	17

Caution: Small Sample Size

WEEKDAY

Trip Rate: 30.32

	Enter	Exit	Total
Directional Split	50%	50%	
Trip Ends	61	61	122

Caution: Small Sample Size

SATURDAY

Trip Rate: 0

	Enter	Exit	Total
Directional Split	50%	50%	
Trip Ends	NA	NA	NA



TRIP GENERATION CALCULATIONS
 Source: Trip Generation Manual, 11th Edition

Land Use: Recreational Community Center
Land Use Code: 495
Land Use Subcategory: All Sites
Setting/Location: General Urban/Suburban
Variable: 1000 SF GFA
Trip Type: Vehicle
Formula Type: Rate
Variable Quantity: 50

AM PEAK HOUR

Trip Rate: 1.91

	Enter	Exit	Total
Directional Split	66%	34%	
Trip Ends	63	33	96

PM PEAK HOUR

Trip Rate: 2.5

	Enter	Exit	Total
Directional Split	47%	53%	
Trip Ends	59	66	125

WEEKDAY

Trip Rate: 28.82

	Enter	Exit	Total
Directional Split	50%	50%	
Trip Ends	721	721	1,442

SATURDAY

Trip Rate: 9.1

	Enter	Exit	Total
Directional Split	50%	50%	
Trip Ends	228	228	456

Caution: Small Sample Size



TRIP GENERATION CALCULATIONS
 Source: Trip Generation Manual, 11th Edition

Land Use: Single-Family Detached Housing
 Land Use Code: 210
 Land Use Subcategory: All Sites
 Setting/Location: General Urban/Suburban
 Variable: Dwelling Units
 Trip Type: Vehicle
 Formula Type: Equation
 Variable Quantity: **83**

AM PEAK HOUR

Trip Rate: =EXP(0.91*LN(\$X2)+0.12)

	Enter	Exit	Total
Directional Split	26%	74%	
Trip Ends	16	47	63

PM PEAK HOUR

Trip Rate: =EXP(0.94*LN(\$X2)+0.27)

	Enter	Exit	Total
Directional Split	63%	37%	
Trip Ends	52	31	83

WEEKDAY

Trip Rate: =EXP(0.92*LN(\$X2)+2.68)

	Enter	Exit	Total
Directional Split	50%	50%	
Trip Ends	425	425	850

SATURDAY

Trip Rate: =EXP(0.97*LN(\$X2)+2.4)

	Enter	Exit	Total
Directional Split	50%	50%	
Trip Ends	401	401	802



TRIP GENERATION CALCULATIONS
 Source: Trip Generation Manual, 11th Edition

Land Use: Single-Family Attached Housing
Land Use Code: 215
Land Use Subcategory: All Sites
Setting/Location: General Urban/Suburban
Variable: Dwelling Units
Trip Type: Vehicle
Formula Type: Equation
Variable Quantity: **207**

AM PEAK HOUR

Trip Rate: =0.52*(\$X3)-5.7

	Enter	Exit	Total
Directional Split	31%	69%	
Trip Ends	32	70	102

PM PEAK HOUR

Trip Rate: =0.6*(\$X3)-3.93

	Enter	Exit	Total
Directional Split	57%	43%	
Trip Ends	68	52	120

WEEKDAY

Trip Rate: =7.62*(\$X3)-60.48

	Enter	Exit	Total
Directional Split	50%	50%	
Trip Ends	758	758	1,516

SATURDAY

Trip Rate: =13.21*(\$X3)-444.34

	Enter	Exit	Total
Directional Split	50%	50%	
Trip Ends	1,145	1,145	2,290

Madeleine Nelson

Subject: RE: Norwood Project Traffic Study Update

From: Mike McCarthy <mmccarthy@tualatin.gov>

Sent: Friday, November 1, 2024 4:28 PM

To: Madeleine Nelson <mnelson@tualatin.gov>; Steve Koper <skoper@tualatin.gov>

Cc: Tony Doran <TDORAN@tualatin.gov>; Hayden Ausland <hausland@tualatin.gov>; Abby McFetridge <Amcfetridge@tualatin.gov>; Kim McMillan <kmcmillan@tualatin.gov>

Subject: FW: Norwood Project Traffic Study Update

Hi Madeleine and Steve,

I have read through the attached trip generation analysis and do not take exception to its conclusion that the TPR criteria are satisfied for this proposal.

Mike McCarthy

Tualatin City Engineer

Phone: 503.691.3674

Cell: 971.666.0000

September 9, 2024

City of Tualatin - Engineering Department
18880 SW Martinazzi Ave. Tualatin, OR 97062



RE: Norwood Townhome Project Utility Availability Report

The purpose of this letter is to identify possible connections to existing public facilities for sanitary sewer, water, and stormwater systems and to demonstrate how the site can be served by gravity sanitary sewer and stormwater. The 1-acre lot that was annexed into the City of Tualatin per Ordinance No. 1472-23 is anticipated to be developed with the 8.3-acre portion of the Horizon Church & School Property (Tax Lot 106 of Washington County Assessor's Map 2S135D).

The proposed public sanitary sewer line will connect to an existing manhole in Southwest Boones Ferry Road. The new line will run south until the intersection of Southwest Boones Ferry Road and Southwest Norwood Road, where it then will run east along Southwest Norwood Road until the subject property's frontage. Another sanitary sewer line will be connected to the new manhole at the intersection and stubbed south for future extension. A new public sanitary sewer main will extend into the property from the new manhole installed near the northwest corner of the property, with sufficient depth to serve all proposed structures. The public sanitary sewer line will have a minimum slope of 0.004 ft/ft, which will offer the most reasonable opportunity for a gravity connection for future re-development/extension. Refer to the attached Exhibit A for additional information regarding proposed slopes, elevations, and service locations.

A new water main for the subject site will tie into the existing public water main in Southwest Norwood Road. The approximate location of the proposed main, is shown in the attached Exhibit A. Per the Water System Capacity Analysis memorandum prepared by Murraysmith (Exhibit C), upon completion of planned capital improvement projects and developer-constructed improvements, adequate water service will be available for this project.

A new public stormwater service for the subject site will connect to the existing public stormwater main in Southwest Boones Ferry Road via a new public storm manhole installed over the main. The service will run east from the new manhole via a new public stormwater easement to the subject site and provide points of connection. Refer to the attached Exhibit B for additional information regarding proposed slopes, elevations, and service locations.

Sincerely,

AKS ENGINEERING & FORESTRY, LLC

A handwritten signature in black ink that reads 'Austin Cole'.

Austin Cole, PE
12965 SW Herman Road, Suite 100
Tualatin, OR 97062
(503) 563-6151 | colea@aks-eng.com

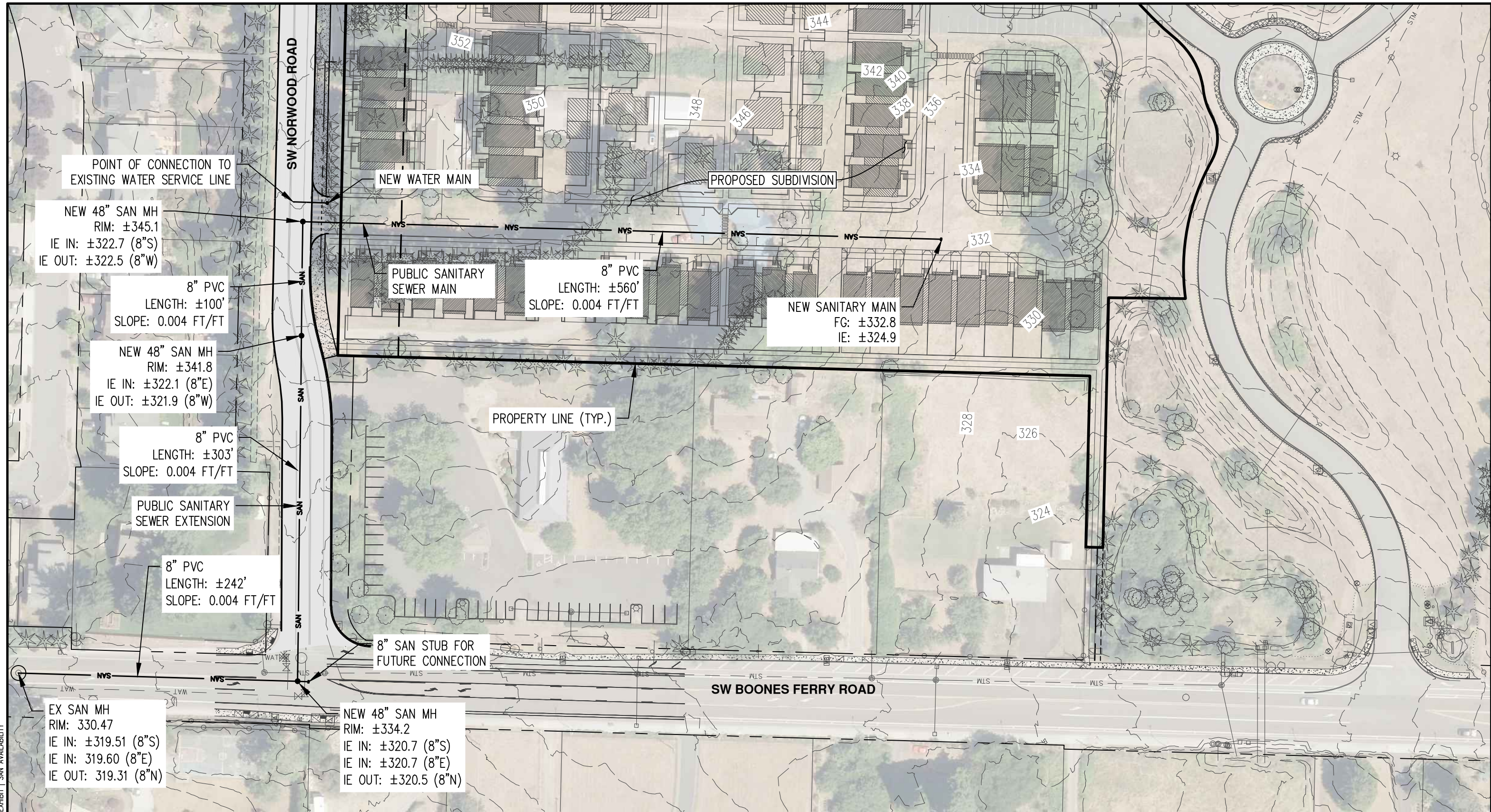


RENEWS: DECEMBER 31, 2023

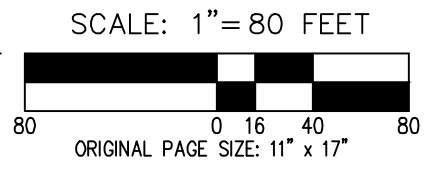
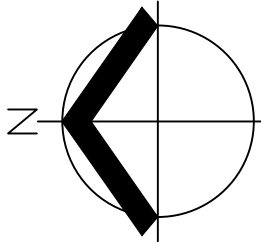
Attachments

- (Exhibit A) Water and Sanitary Sewer Availability Exhibit
- (Exhibit B) Stormwater Availability Exhibit
- (Exhibit C) Murraysmith Water Capacity Memorandum

DWG: 8723_20220908_SANITARY_AVAILABILITY_EXHIBIT | SAN AVAILABILITY



DATE: 09/05/2024



WATER AND SANITARY SEWER AVAILABILITY EXHIBIT		EXHIBIT
NORWOOD TOWNHOME PROJECT		A
AKS ENGINEERING & FORESTRY, LLC 12965 SW HERMAN RD #100 TUALATIN, OR 97062 503.563.6151 WWW.AKS-ENG.COM		DRWN: JAM CHKD: CAK AKS JOB: 8723



DWG: 8723_20220908 STORM AVAILABILITY EXHIBIT | AVAILABILITY

SW BOONES FERRY ROAD

NEW PUBLIC 15.0' STORM DRAINAGE EASEMENT

12" PUBLIC STORM SEWER
LENGTH: ±125'
SLOPE: 0.005 FT/FT

12" PUBLIC STORM SEWER
LENGTH: ±150'
SLOPE: 0.005 FT/FT

PUBLIC STORM MAIN CONNECTION
FG: ±328.0
IE: ±320.3

NEW PUBLIC STORM MANHOLE
IE: ±318.8

PUBLIC STORM MANHOLE
IE: ±319.4

PUBLIC STORM MANHOLE
IE: ±320.2

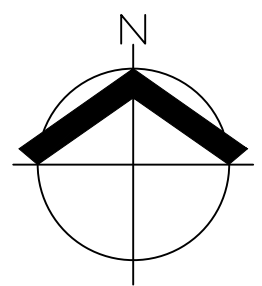
VEGETATED CORRIDOR

PROPERTY LINE (TYP.)

PROPOSED SUBDIVISION

VEGETATED CORRIDOR

SCALE: 1" = 50 FEET



DATE: 09/05/2024

STORMWATER AVAILABILITY EXHIBIT		EXHIBIT
NORWOOD TOWNHOME PROJECT		B
AKS ENGINEERING & FORESTRY, LLC 12965 SW HERMAN RD #100 TUALATIN, OR 97062 503.563.6151 WWW.AKS-ENG.COM		DRWN: JAM CHKD: CAK AKS JOB: 8723



Memorandum

Date: September 11, 2022

Project: 20-2737, On-Call Water System Analysis

To: Ms. Kim McMillan, PE – Community Development Director
Mr. Tony Doran – Engineering Associate
City of Tualatin

From: Brian Ginter, PE

Re: 9300 SW Norwood – Water System Capacity Analysis

Introduction

As requested, this memorandum has been prepared to present the findings of our analysis of the water service to the proposed multi-family development located at 9300 SW Norwood Road, southeast of the intersection of Boones Ferry Road and Norwood Road. This memorandum presents the findings of this analysis for the City's use in determining the water system improvements necessary to meet fire flow and pressure requirements.

Analysis and Conclusions

MurraySmith performed a review of the water service requirements associated with this development, and confirmed that the proposed multi-family develop does not require further analysis since prior analyses of proposed developments in the vicinity (Autumn Sunrise Subdivision and the Community Partners for Affordable Housing – Plambeck Gardens), have already defined water service availability and required water system improvements.

With the completion of the following planned improvements, a combination of City capital improvement projects and developer-constructed improvements, adequate water service for domestic and fire suppression is available at the proposed development.

- An 18-inch diameter B-level water line in Boones Ferry Road (to Norwood) being designed by AKS as a City CIP. The line extends east on Norwood to the B Level Reservoir/C Level Pump Station site.
- Lennar will upsize additional lines for the C-level, either by adding a new line across the Norwood frontage of the Autumn Sunrise development or upsizing the internal lines (following the street layout).

- CPAH is required by COAs to extend a 12-inch diameter C-level water line down Boones Ferry Road, from Norwood Road to their south property line.
- Autumn Sunrise will be installing upsized C-level lines from Norwood Road, through the development, out to BFR via Mahogany/Salinan, and then north to connect to the line CPAH will be installing in BFR.

If the proposed development at 9300 SW Norwood Road occurs prior to the completion of these improvements, it may impact the availability of water service.

NORWOOD DEVELOPMENT

SCHEMATIC SITE OPTIONS

NORWOOD ROAD



type	Qty.	Lot Size W x D (ft)	Private Parking	
			Covered	Open
Townhouse - A	44	27 x 62.5	88	
Townhouse - B	2	22 x 62.5	4	
Townhouse - C	18	25 x 80	36	
Townhouse - D	12	25 x 63.6	24	
Cottage - A	12	47 x 78	24	
Cottage - B	2	48 x 60	2	
Cottage - general				24
Ttl. Townhouse	76		Private	Street
Ttl. Cottage	14		Parking	Parking
Total	90		202	56

LEGEND:

TOWNHOUSE		PEDESTRIAN PATHS	
COTTAGE		PUBLIC OPEN SPACE / LANDSCAPE	
PUBLIC STREET		PRIVATE OPEN SPACE / LANDSCAPE	
PRIVATE ALLEY			



**PUBLIC RECORD REPORT
FOR NEW SUBDIVISION OR LAND PARTITION**

THIS REPORT IS ISSUED BY THE ABOVE-NAMED COMPANY ("THE COMPANY") FOR THE EXCLUSIVE USE OF:

Ken Allen Properties
16998 Greentree Ave
Lake Oswego , OR 97034
Phone:
Fax:

Date Prepared : June 20, 2024
Effective Date : 8:00 A.M on June 11, 2024
Order No. : 7019-4177418
Subdivision :

The information contained in this report is furnished by First American Title Insurance Company (the "Company") as an information service based on the records and indices maintained by the Company for the county identified below. This report is not title insurance, is not a preliminary title report for title insurance, and is not a commitment for title insurance. No examination has been made of the Company's records, other than as specifically set forth in this report. Liability for any loss arising from errors and/or omissions is limited to the lesser of the fee paid or the actual loss to the Customer, and the Company will have no greater liability by reason of this report. This report is subject to the Definitions, Conditions and Stipulations contained in it.

REPORT

- A. The Land referred to in this report is located in the County of Washington, State of Oregon, and is described as follows:

As fully set forth on Exhibit "A" attached hereto and by this reference made a part hereof.

- B. As of the Effective Date, the tax account and map references pertinent to the Land are as follows:

As fully set forth on Exhibit "A" attached hereto and by this reference made a part hereof.

- C. As of the Effective Date and according to the Public Records, we find title to the land apparently vested in:

As fully set forth on Exhibit "B" attached hereto and by this reference made a part hereof

- D. As of the Effective Date and according to the Public Records, the Land is subject to the following liens and encumbrances, which are not necessarily shown in the order of priority:

As fully set forth on Exhibit "C" attached hereto and by this reference made a part hereof.

EXHIBIT "A"
(Land Description Map Tax and Account)

A portion of Document Number [2015-081254](#), located in the Southeast One-Quarter of Section 35, Township 2 South, Range 1 West, Willamette Meridian, City of Tualatin, Washington County, Oregon, and being more particularly described as follows:

Commencing at an iron pipe located at the Center One-Quarter corner of said Section 35; thence along the north line of the Southeast One-Quarter of said Section 35, South $88^{\circ}38'39''$ East 294.08 feet to the northerly extension of the east line of Document Number [2023-028948](#), Washington County records; thence leaving said north line, along the northerly extension of said east line, South $01^{\circ}34'14''$ West 17.00 feet to a line parallel with and 17.00 feet southerly of the north line of said Southeast One-quarter and the Point of Beginning; thence along said parallel line, South $88^{\circ}38'39''$ East 85.03 feet to the west line of Document Number [2023-033824](#), Washington County records; thence along said west line, South $01^{\circ}09'30''$ West 199.22 feet to an angle point; thence continuing along said west line, South $51^{\circ}52'23''$ East 77.30 feet to the south line of said Deed; thence along said south line, South $88^{\circ}57'06''$ East 109.43 feet to the southeast corner thereof; thence along the east line of said Deed, North $01^{\circ}20'04''$ East 244.91 feet to a line parallel with and 17.00 feet southerly of the north line of said Southeast One-Quarter; thence along said parallel line, South $88^{\circ}38'39''$ East 346.88 feet; thence leaving said parallel line, South $01^{\circ}21'21''$ West 47.35 feet; thence North $88^{\circ}38'39''$ West 20.00 feet; thence South $01^{\circ}34'46''$ West 500.25 feet; thence along a non-tangent curve to the right (with a radial bearing of North $37^{\circ}18'52''$ West) with a Radius of 220.50 feet, a Central Angle of $12^{\circ}20'05''$, an Arc Length of 47.47 feet, and a Chord of South $58^{\circ}51'11''$ West 47.38 feet; thence South $65^{\circ}01'13''$ West 162.89 feet; thence along a curve to the left with a Radius of 297.00 feet, a Central Angle of $25^{\circ}33'33''$, an Arc Length of 132.49 feet, and a Chord of South $52^{\circ}14'26''$ West 131.39 feet; thence along a reverse curve to the right with a Radius of 64.50 feet, a Central Angle of $44^{\circ}21'28''$, an Arc Length of 49.94 feet, and a Chord of South $61^{\circ}38'24''$ West 48.70 feet; thence along a reverse curve to the left with a Radius of 64.50 feet, a Central Angle of $22^{\circ}47'30''$, an Arc Length of 25.66 feet, and a Chord of South $72^{\circ}25'23''$ West 25.49 feet; thence along a reverse curve to the right with a Radius of 40.00 feet, a Central Angle of $58^{\circ}15'43''$, an Arc Length of 40.67 feet, and a Chord of North $89^{\circ}50'31''$ West 38.94 feet; thence along a reverse curve to the left with a Radius of 194.00 feet, a Central Angle of $36^{\circ}57'36''$, an Arc Length of 125.14 feet, and a Chord of North $79^{\circ}11'27''$ West 122.99 feet to a point of non-tangency; thence North $00^{\circ}38'15''$ East 67.14 feet; thence North $88^{\circ}41'18''$ West 219.01 feet; thence North $01^{\circ}18'42''$ East 14.97 feet to the south line of Document Number [2021-097551](#), Washington County records; thence along said south line, South $88^{\circ}41'18''$ East 150.03 feet to the southeast corner thereof; thence along the east line of said Deed, and the east line of Document Number [2022-035715](#) and [2023-028948](#), North $01^{\circ}34'14''$ East 659.18 feet to the Point of Beginning.

Map No.: 2S135D000106
Tax Account No.: R560208

EXHIBIT "B"
(Vesting)

Horizon Community Church, an Oregon nonprofit corporation

EXHIBIT "C"
(Liens and Encumbrances)

1. City liens, if any, of the City of Tualatin.
2. Statutory powers and assessments of Clean Water Services.
3. Easement, including terms and provisions contained therein:
Recording Information: August 14, 1948 as [Volume 288, Page 14](#)
In Favor of: The Pacific Telephone and Telegraph Company, a California corporation
For: pole line and anchor and incidental purposes
Affects: as described therein
4. Abutter's rights of ingress and egress to or from State Highway have been relinquished in the document recorded October 11, 1951 as [Volume 325, Page 0577](#).
5. Restrictive Covenant to Waive Remonstrance, pertaining to Customarily (commonly) Accepted Farm or Forestry Practices including the terms and provisions thereof
Recorded: July 07, 2003 as Fee No. [2003 110030](#)
6. Easement, including terms and provisions contained therein:
Recording Information: July 09, 2003 as [2003 111268](#)
In Favor of: Washington County, a political subdivision of the State of Oregon
For: Right-of-Way and incidental purposes
Affects: as described therein
7. Restrictive Covenant to Waive Remonstrance, pertaining to Motor Vehicle Access including the terms and provisions thereof
Recorded: July 09, 2003 as Fee No. [2003 111269](#)
8. Deed of Trust and assignment of rents.
Grantor/Trustor: Horizon Community Church, an Oregon nonprofit corporation
Grantee/Beneficiary: Church Extension Plan, an Oregon nonprofit corporation
Trustee: Ticor Title Insurance Company
Amount: \$10,271,041.00
Recorded: May 23, 2022
Recording Information: Fee No. [2022 034444](#) (affects additional property)

Note: This Deed of Trust contains Line of Credit privileges. If the current balance owing on said obligation is to be paid in full in the forthcoming transaction, confirmation should be made that the beneficiary will issue a proper request for full reconveyance.

NOTE: Taxes for the year 2023-2024 PAID IN FULL

Tax Amount: \$6,263.66
Map No.: 2S135D000106
Property ID: R560208 (not segregated and covers additional property)
Tax Code No.: 088.15

DEFINITIONS, CONDITIONS AND STIPULATIONS

1. **Definitions.** The following terms have the stated meaning when used in this report:
 - (a) "Customer": The person or persons named or shown as the addressee of this report.
 - (b) "Effective Date": The effective date stated in this report.
 - (c) "Land": The land specifically described in this report and improvements affixed thereto which by law constitute real property.
 - (d) "Public Records": Those records which by the laws of the state of Oregon impart constructive notice of matters relating to the Land.

2. **Liability of the Company.**
 - (a) THIS REPORT IS NOT AN INSURED PRODUCT OR SERVICE OR A REPRESENTATION OF THE CONDITION OF TITLE TO REAL PROPERTY. IT IS NOT AN ABSTRACT, LEGAL OPINION, OPINION OF TITLE, TITLE INSURANCE COMMITMENT OR PRELIMINARY REPORT, OR ANY FORM OF TITLE INSURANCE OR GUARANTY. THIS REPORT IS ISSUED EXCLUSIVELY FOR THE BENEFIT OF THE APPLICANT THEREFOR, AND MAY NOT BE USED OR RELIED UPON BY ANY OTHER PERSON. THIS REPORT MAY NOT BE REPRODUCED IN ANY MANNER WITHOUT FIRST AMERICAN'S PRIOR WRITTEN CONSENT. FIRST AMERICAN DOES NOT REPRESENT OR WARRANT THAT THE INFORMATION HEREIN IS COMPLETE OR FREE FROM ERROR, AND THE INFORMATION HEREIN IS PROVIDED WITHOUT ANY WARRANTIES OF ANY KIND, AS-IS, AND WITH ALL FAULTS. AS A MATERIAL PART OF THE CONSIDERATION GIVEN IN EXCHANGE FOR THE ISSUANCE OF THIS REPORT, RECIPIENT AGREES THAT FIRST AMERICAN'S SOLE LIABILITY FOR ANY LOSS OR DAMAGE CAUSED BY AN ERROR OR OMISSION DUE TO INACCURATE INFORMATION OR NEGLIGENCE IN PREPARING THIS REPORT SHALL BE LIMITED TO THE FEE CHARGED FOR THE REPORT. RECIPIENT ACCEPTS THIS REPORT WITH THIS LIMITATION AND AGREES THAT FIRST AMERICAN WOULD NOT HAVE ISSUED THIS REPORT BUT FOR THE LIMITATION OF LIABILITY DESCRIBED ABOVE. FIRST AMERICAN MAKES NO REPRESENTATION OR WARRANTY AS TO THE LEGALITY OR PROPRIETY OF RECIPIENT'S USE OF THE INFORMATION HEREIN.
 - (b) No costs (including, without limitation attorney fees and other expenses) of defense, or prosecution of any action, is afforded to the Customer.
 - (c) In any event, the Company assumes no liability for loss or damage by reason of the following:
 - (1) Taxes or assessments which are not shown as existing liens by the records of any taxing authority that levies taxes or assessments on real property or by the Public Records.
 - (2) Any facts, rights, interests or claims which are not shown by the Public Records but which could be ascertained by an inspection of the land or by making inquiry of persons in possession thereof.
 - (3) Easements, liens or encumbrances, or claims thereof, which are not shown by the Public Records.
 - (4) Discrepancies, encroachments, shortage in area, conflicts in boundary lines or any other facts which a survey would disclose.
 - (5) (i) Unpatented mining claims; (ii) reservations or exceptions in patents or in Acts authorizing the issuance thereof, (iii) water rights or claims or title to water.
 - (6) Any right, title, interest, estate or easement in land beyond the lines of the area specifically described or referred to in this report, or in abutting streets, roads, avenues, alleys, lanes, ways or waterways.
 - (7) Any law, ordinance or governmental regulation (including but not limited to building and zoning laws, ordinances or regulations) restricting, regulating, prohibiting or relating to (i) the occupancy, use or enjoyment on the land; (ii) the character, dimensions or location of any improvement now or hereafter erected on the land; (iii) a separation in ownership or a change in the dimensions or area of the land or any parcel of which the land is or was a part; or (iv) environmental protection, or the effect of any violation of these laws, ordinances or governmental regulations, except to the extent that a notice of the enforcement thereof or a notice of a defect, lien or encumbrance resulting from a violation or alleged violation affecting the land has been recorded in the Public Records at the effective date hereof.
 - (8) Any governmental police power not excluded by 2(d)(7) above, except to the extent that notice of the exercise thereof or a notice of a defect, lien or encumbrance resulting from a violation or alleged violation affecting the land has been recorded in the Public Records at the effective date hereof.
 - (9) Defects, liens, encumbrances, adverse claims or other matters created, suffered, assumed, agreed to or actually known by the Customer.

3. **Charge.** The charge for this report does not include supplemental reports, updates or other additional services of the Company.



First American Title[™]

First American Title Insurance Company
1 SW Columbia Street, Ste 1600
Portland, OR 97204

Illegal Restrictive Covenants

Please be advised that any provision contained in this document, or in a document that is attached, linked, or referenced in this document, that under applicable law illegally discriminates against a class of individuals based upon personal characteristics such as race, color, religion, sex, sexual orientation, gender identity, familial status, disability, national origin, or any other legally protected class, is illegal and unenforceable by law.



First American Title™

First American Title Insurance Company

1 SW Columbia Street, Ste 1600

Portland, OR 97204

Phone: (503)222-3651 / Fax: (877)242-3513

PR: NWEST

Ofc: 7019 (1011)

Final Invoice

To: Ken Allen Properties
16998 Greentree Ave
Lake Oswego, OR 97034

Invoice No.: 1011 - 7019176323

Date: 06/20/2024

Our File No.: 7019-4177418

Title Officer: Dona Lane

Escrow Officer:

Customer ID: AD9364988

Attention: Ken Allen

Liability Amounts

Your Ref.:

RE: Property:
23370 SW Boones Ferry Road, Tualatin, OR 97062

Buyers:

Sellers: Horizon Community Church

Description of Charge	Invoice Amount
Guarantee: Subdivision/Plat Certificate	\$275.00

INVOICE TOTAL \$275.00

Comments:

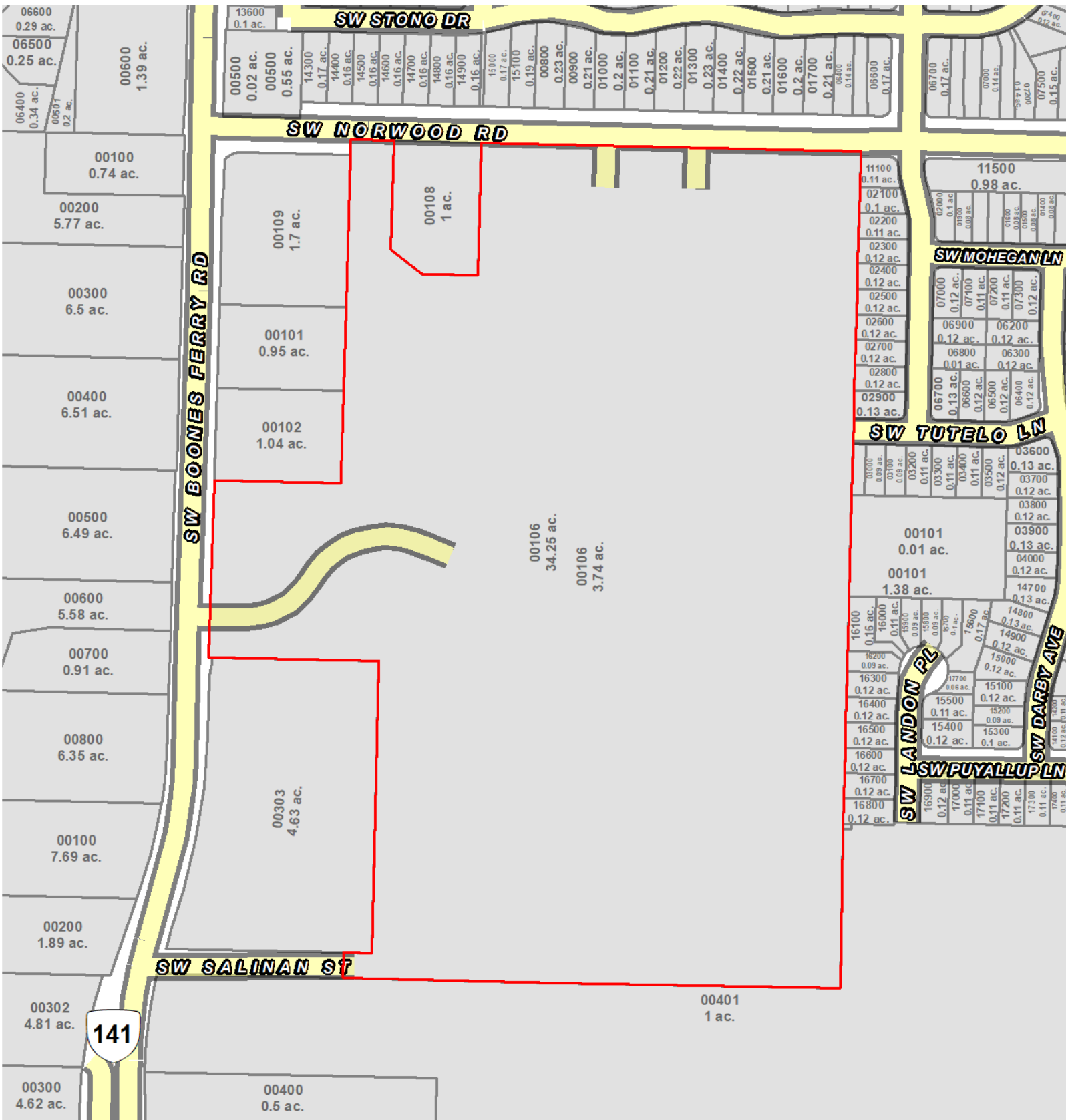
Thank you for your business!

To assure proper credit, please send a copy of this Invoice and Payment to:

Attention: Accounts Receivable Department

To pay electronically go to, <https://firstam.us/paytitleinvoice>, or mail check to PO Box 31001-2281

Pasadena, CA 91110-2281



Taxlot



Subject



Taxlot

Washington County, Oregon **2015-081254**
D-DQ
Stn=18 K GRUNEWALD **09/25/2015 09:58:47 AM**
\$40.00 \$11.00 \$5.00 \$20.00 **\$76.00**

I, Richard Hobernicht, Director of Assessment and Taxation and Ex-Officio County Clerk for Washington County, Oregon, do hereby certify that the within instrument of writing was received and recorded in the book of records of said county.

Richard Hobernicht, Director of
Assessment and Taxation, Ex-Officio

APN: 2S1328B00700

Statutory Quitclaim Deed

File No.: **NCS-744201-STLO (LS)**
Date: **09/04/2015**



After recording return to:
First American Title Ins. Co.
ATTN: Lianne Schraer; 8182
Maryland Ave., Ste. 400
St. Louis, MO 63105

Until a change is requested all tax
statements shall be sent to:
Horizon Community Church
23370 SW Boones Ferry Rd.
Tualatin, OR 97062

File No.: NCS-744201-STLO (LS)
Date: September 04, 2015

THIS SPACE RESERVED FOR RECORDER'S USE

STATUTORY QUITCLAIM DEED

Horizon Community Church, an Oregon nonprofit corporation who acquired title as Grace Community Church of the Assemblies of God, Inc., an Oregon non-profit corporation, Grantor, releases and quitclaims to **Horizon Community Church, an Oregon nonprofit corporation ,** all rights and interest in and to the following described real property:

LEGAL DESCRIPTION: Real property in the County of Washington, State of Oregon, described as follows:

See Exhibit "A" attached hereto and made part hereof.

The true consideration for this conveyance is **\$0.00.** (Here comply with requirements of ORS 93.030)

BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON TRANSFERRING FEE TITLE SHOULD INQUIRE ABOUT THE PERSON'S RIGHTS, IF ANY, UNDER ORS 195.300, 195.301 AND 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424, OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009, AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010. THIS INSTRUMENT DOES NOT ALLOW USE OF THE PROPERTY DESCRIBED IN THIS INSTRUMENT IN VIOLATION OF APPLICABLE LAND USE LAWS AND REGULATIONS. BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON ACQUIRING FEE TITLE TO THE PROPERTY SHOULD CHECK WITH THE APPROPRIATE CITY OR COUNTY PLANNING DEPARTMENT TO VERIFY THAT THE UNIT OF LAND BEING TRANSFERRED IS A LAWFULLY ESTABLISHED LOT OR PARCEL, AS DEFINED IN ORS 92.010 OR 215.010, TO VERIFY THE APPROVED USES OF THE LOT OR PARCEL, TO DETERMINE ANY LIMITS ON LAWSUITS AGAINST FARMING OR FOREST PRACTICES, AS DEFINED IN ORS 30.930, AND TO INQUIRE ABOUT THE RIGHTS OF NEIGHBORING PROPERTY OWNERS, IF ANY, UNDER ORS 195.300, 195.301 AND 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424, OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009, AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010.

Dated this 24 day of September, 2015.

Horizon Community Church, an Oregon nonprofit corporation who acquired title as Grace Community Church of the Assemblies of God, Inc., an Oregon non-profit corporation

By: [Signature]
Stan Russell, Senior Pastor

By: [Signature]
William Stine, Secretary-Treasurer

STATE OF Oregon)
Clackamas)ss.
County of Washington)

This instrument was acknowledged before me on this _____ day of September, 2015 by Stan Russell and William Stine, the Senior Pastor and Secretary-Treasurer respectively for Horizon Community Church, an Oregon nonprofit Corporation, FKA Grace Community Church of the Assemblies of God, Inc., an Oregon non-profit corporation on behalf of said corporation.

[Signature]
Notary Public for Oregon
My commission expires:

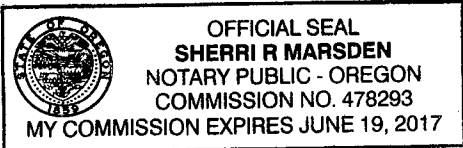


Exhibit "A"

PARCEL I:

TRACT 1:

A TRACT OF LAND LYING IN THE SOUTHEAST ONE-QUARTER OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST OF THE WILLAMETTE MERIDIAN, IN THE COUNTY OF WASHINGTON AND STATE OF OREGON, DESCRIBED AS FOLLOWS:

**BEGINNING AT THE NORTHEAST CORNER OF THE SOUTHWEST ONE-QUARTER OF THE SOUTHEAST ONE-QUARTER OF SAID SECTION 35;
THENCE EAST 676.0 FEET TO A POINT ON THE WESTERLY RIGHT OF WAY LINE OF THE R.H. BALDOCK FREEWAY;
THENCE SOUTHERLY ALONG SAID WESTERLY RIGHT OF WAY LINE 675.0 FEET TO A POINT ON THE NORTHERLY LINE OF LOT 4, TUALATIN ORCHARD TRACT [PLAT BOOK 6, PAGE 0022], WASHINGTON COUNTY, OREGON; THENCE WESTERLY ALONG SAID NORTHERLY LINE AND ITS EXTENSION THEREOF 490.0 FEET TO THE SOUTHEAST CORNER OF PARCEL I AS DESCRIBED IN DEED TO JAMES KING & CO., AN OREGON CORPORATION, RECORDED APRIL 25, 1975 IN BOOK 1020, PAGE 0386, DEED RECORDS OF WASHINGTON COUNTY, OREGON;
THENCE NORTH 0° 14' EAST 330.0 FEET TO THE NORTHEAST CORNER OF SAID KING TRACT;
THENCE SOUTH 89° 53' 45" WEST ALONG THE NORTHERLY LINE OF SAID KING TRACT 1380.12 FEET TO A POINT ON THE EASTERLY RIGHT OF WAY LINE OF STATE HIGHWAY 217 (SW BOONES FERRY ROAD);
THENCE NORTHERLY ALONG THE EASTERLY RIGHT OF WAY LINE TO A POINT ON THE SOUTH LINE OF THAT TRACT OF LAND CONVEYED TO KENNETH L. FURROW, ET UX, RECORDED MARCH 25, 1970 IN BOOK 774, PAGE 0864, DEED RECORDS OF WASHINGTON COUNTY, OREGON;
THENCE EAST 1280 FEET TO A POINT ON THE WEST LINE OF THAT TRACT OF LAND CONVEYED TO THE CITY OF TUALATIN, RECORDED JULY 12, 1971 IN BOOK 825, PAGE 0873, DEED RECORDS OF WASHINGTON COUNTY, OREGON (SAID POINT BEING 16.5 FEET SOUTH OF THE NORTHWEST CORNER OF SAID CITY OF TUALATIN TRACT);
THENCE SOUTH ALONG SAID WEST LINE EXTENDED 660.0 FEET;
THENCE EAST 16.5 FEET;
THENCE NORTH 16.5 FEET TO THE POINT OF BEGINNING.**

SAVE AND EXCEPT PARCELS A, B, C, & D AS FOLLOWS:

PARCEL A:

**BEGINNING AT A POINT WHICH IS 295 FEET NORTH OF THE SOUTHWEST CORNER OF THE NORTHWEST ONE-QUARTER OF THE SOUTHEAST ONE-QUARTER OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST OF THE WILLAMETTE MERIDIAN, IN THE COUNTY OF WASHINGTON AND STATE OF OREGON;
THENCE EAST 380 FEET TO A POINT;
THENCE SOUTH 575 FEET TO A POINT;
THENCE WEST TO A POINT IN THE CENTER OF SOUTHWEST BOONES FERRY ROAD (STATE HIGHWAY NO. 217);**

THENCE IN A NORTHERLY DIRECTION ALONG THE CENTER LINE OF SOUTHWEST BOONES FERRY ROAD TO THE POINT OF BEGINNING.

PARCEL B:

**BEGINNING AT A POINT WHICH IS 295 FEET NORTH OF THE SOUTHWEST CORNER OF THE NORTHWEST ONE-QUARTER OF THE SOUTHEAST ONE-QUARTER OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST OF THE WILLAMETTE MERIDIAN, IN THE COUNTY OF WASHINGTON AND STATE OF OREGON;
THENCE EAST 740 FEET TO A POINT;
THENCE SOUTH 625 FEET TO THE TRUE POINT OF BEGINNING;
THENCE NORTH 625 FEET TO A POINT;
THENCE WEST 360 FEET TO A POINT;
THENCE SOUTH 575 FEET TO A POINT;
THENCE WEST TO A POINT IN THE CENTER OF SOUTHWEST BOONES FERRY ROAD (STATE HIGHWAY NO. 217);
THENCE IN A SOUTHERLY DIRECTION TO THE NORTHWEST CORNER OF THAT CERTAIN TRACT OF LAND CONVEYED TO GEORGE H. ANDREWS BY BARGAIN AND SALE DEED, RECORDED APRIL 25, 1975 IN BOOK 1020, PAGE 0383, RECORDS OF WASHINGTON COUNTY, OREGON;
THENCE EAST ALONG THE NORTH LINE OF THE SAID ANDREWS TRACT TO THE POINT OF BEGINNING.**

PARCEL C:

A PORTION OF PARCEL I OF THOSE CERTAIN TRACTS OF LAND IN THE SOUTHEAST ONE-QUARTER OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST OF THE WILLAMETTE MERIDIAN, IN THE COUNTY OF WASHINGTON AND STATE OF OREGON, CONVEYED TO GRACE COMMUNITY CHURCH OF THE ASSEMBLIES OF GOD, INC., BY DEED RECORDED JUNE 12, 2001 AS FEE NO. 2001 055727, WASHINGTON COUNTY, OREGON, DEED RECORDS, SAID PORTION BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

**BEGINNING AT A POINT ON THE SOUTH LINE OF PARCEL II, SAID DOCUMENT RECORDED JUNE 12, 2001 AS FEE NO. 2001 055727, WHICH POINT BEARS NORTH 89° 38' 45" EAST 284.71 FEET FROM THE SOUTHWEST CORNER THEREOF, AND RUNNING THENCE ALONG SAID SOUTH LINE TO THE SOUTHEAST CORNER OF SAID PARCEL II, NORTH 89° 38' 45" EAST 465.03 FEET;
THENCE SOUTH 00° 09' 07" EAST 972.37 FEET TO A POINT ON THE NORTH LINE OF THAT CERTAIN TRACT OF LAND CONVEYED TO GRACE COMMUNITY CHURCH BY DEED RECORDED JANUARY 11, 2002 AS FEE NO. 2002 004397, SAID DEED RECORDS;
THENCE SOUTH 89° 36' 05" WEST ALONG SAID NORTH LINE, 281.60 FEET;
THENCE NORTH 00° 00' 00" EAST 452.22 FEET;
THENCE NORTH 60° 00' 00" WEST 212.13 FEET;
THENCE NORTH 00° 05' 57" WEST 98.50 FEET;
THENCE NORTH 30° 00' 00" EAST 121.00 FEET;
THENCE NORTH 00° 00' 00" EAST 101.39 FEET;
THENCE NORTH 30° 00' 00" WEST 125.27 FEET TO THE POINT OF BEGINNING.**

PARCEL D:

A PORTION OF PARCEL I OF THOSE CERTAIN TRACTS OF LAND IN THE SOUTHEAST ONE-QUARTER OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST OF THE WILLAMETTE MERIDIAN, IN THE COUNTY OF WASHINGTON AND STATE OF OREGON, CONVEYED TO GRACE COMMUNITY CHURCH OF THE ASSEMBLIES OF GOD, INC., BY DEED RECORDED JUNE 12, 2001 AS FEE NO. 2001 055727, WASHINGTON COUNTY, OREGON, DEED RECORDS, SAID PORTION BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

**BEGINNING AT THE SOUTHEAST CORNER OF THAT CERTAIN TRACT OF LAND CONVEYED TO GRACE COMMUNITY CHURCH BY DEED RECORDED JANUARY 11, 2002 AS FEE NO. 2002 004397, SAID DEED RECORDS, AND RUNNING THENCE ALONG THE BOUNDARY OF SAID PARCEL I, NORTH 89° 34' 49" EAST 485.62 FEET, NORTH 15° 44' 54" EAST 690.21 FEET, SOUTH 89° 35' 49" WEST 674.70 FEET, SOUTH 08° 09' 07" EAST 36.50 FEET, AND SOUTH 69° 38' 49" WEST 16.50 FEET;
THENCE SOUTH 00° 09' 07" EAST 313.47 FEET TO A POINT ON THE NORTH LINE OF SAID DOCUMENT RECORDED JANUARY 11, 2002 AS FEE NO. 2002 004397;
THENCE ALONG THE BOUNDARY THEREOF, NORTH 89° 36' 05" EAST 16.50 FEET AND SOUTH 00° 08' 37" EAST 313.16 FEET TO THE POINT OF BEGINNING.**

THE LEGAL DESCRIPTION WAS CREATED PRIOR TO JANUARY 01, 2008.

TRACT 2:

**BEGINNING AT A POINT ON THE NORTH LINE OF THE SOUTHEAST ONE-QUARTER OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST OF THE WILLAMETTE MERIDIAN, IN THE COUNTY OF WASHINGTON AND STATE OF OREGON, EAST 551 FEET FROM THE CENTER OF SAID SECTION 35;
THENCE EAST ALONG THE ONE-QUARTER SECTION LINE 752.5 FEET;
THENCE SOUTH PARALLEL TO THE WEST LINE OF SAID SOUTHEAST ONE-QUARTER 676.5 FEET TO A POINT;
THENCE WEST PARALLEL TO THE NORTH LINE OF SAID SOUTHEAST ONE-QUARTER 752.5 FEET TO A POINT;
THENCE NORTH PARALLEL WITH THE WEST LINE OF SAID SOUTHEAST ONE-QUARTER 676.5 FEET TO THE POINT OF BEGINNING.**

TOGETHER WITH A PORTION OF PARCEL I OF THOSE CERTAIN TRACTS OF LAND IN THE SOUTHEAST ONE-QUARTER OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST OF THE WILLAMETTE MERIDIAN, IN THE COUNTY OF WASHINGTON AND STATE OF OREGON, CONVEYED TO GRACE COMMUNITY CHURCH OF THE ASSEMBLIES OF GOD, INC., BY DEED RECORDED JUNE 12, 2001 AS FEE NO. 2001 055727, WASHINGTON COUNTY, OREGON, DEED RECORDS, SAID PORTION BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

**BEGINNING AT A POINT ON THE SOUTH LINE OF PARCEL II, SAID DOCUMENT RECORDED JUNE 12, 2001 AS FEE NO. 2001 055727, WHICH POINT BEARS NORTH 89° 38' 45" EAST 284.71 FEET FROM THE SOUTHWEST CORNER THEREOF, AND RUNNING THENCE ALONG SAID SOUTH LINE TO THE SOUTHEAST CORNER OF SAID PARCEL II, NORTH 89° 38' 45" EAST 465.03 FEET;
THENCE SOUTH 00° 09' 07" EAST 972.37 FEET TO A POINT ON THE NORTH LINE OF THAT CERTAIN TRACT OF LAND CONVEYED TO GRACE COMMUNITY CHURCH BY DEED RECORDED**

**JANUARY 11, 2002 AS FEE NO. 2002 004397, SAID DEED RECORDS;
THENCE SOUTH 89° 36' 05" WEST ALONG SAID NORTH LINE, 281.60 FEET;
THENCE NORTH 00° 00' 00" EAST 452.22 FEET;
THENCE NORTH 60° 00' 00" WEST 212.13 FEET;
THENCE NORTH 00° 05' 57" WEST 98.50 FEET;
THENCE NORTH 30° 00' 00" EAST 121.00 FEET;
THENCE NORTH 00° 00' 00" EAST 101.39 FEET;
THENCE NORTH 30° 00' 00" WEST 125.27 FEET TO THE POINT OF BEGINNING.**

THE LEGAL DESCRIPTION WAS CREATED PRIOR TO JANUARY 01, 2008.

TRACT 3:

**BEGINNING AT A POINT WHICH IS 295 FEET NORTH OF THE SOUTHWEST CORNER OF THE NORTHWEST QUARTER OF THE SOUTHEAST QUARTER OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST, OF THE WILLAMETTE MERIDIAN, IN THE COUNTY OF WASHINGTON AND STATE OF OREGON;
THENCE EAST 740 FEET TO A POINT;
THENCE SOUTH 625 FEET TO THE TRUE POINT OF BEGINNING;
THENCE NORTH 625 FEET TO A POINT;
THENCE WEST 360 FEET TO A POINT;
THENCE SOUTH 575 FEET TO A POINT;
THENCE WEST TO A POINT IN THE CENTER OF SOUTHWEST BOONES FERRY ROAD (STATE HIGHWAY NO. 217);
THENCE IN A SOUTHERLY DIRECTION TO THE NORTHWEST CORNER OF THAT CERTAIN TRACT OF LAND CONVEYED TO GEORGE H. ANDREWS BY BARGAIN AND SALE DEED, RECORDED APRIL 25, 1975, IN BOOK 1020, PAGE 0383, RECORDS OF WASHINGTON COUNTY, OREGON; THENCE EAST ALONG THE NORTH LINE OF THE SAID ANDREWS TRACT TO THE POINT OF BEGINNING.**

THE LEGAL DESCRIPTION WAS CREATED PRIOR TO JANUARY 01, 2008.

TRACT 4:

A TRACT OF LAND IN THE SOUTHEAST ONE-QUARTER OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST OF THE WILLAMETTE MERIDIAN, IN THE COUNTY OF WASHINGTON AND STATE OF OREGON, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

**BEGINNING AT A POINT ON THE NORTH LINE OF THE SOUTHEAST ONE-QUARTER OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST OF THE WILLAMETTE MERIDIAN, IN THE COUNTY OF WASHINGTON AND STATE OF OREGON, 294 FEET EAST OF AN IRON BAR MARKING THE CENTER OF SAID SECTION;
THENCE EAST ALONG SAID NORTH LINE, 257 FEET TO A POINT;
THENCE SOUTH PARALLEL TO THE WEST LINE OF THE SOUTHEAST ONE-QUARTER OF SAID SECTION 35, A DISTANCE OF 660 FEET TO A POINT;
THENCE WEST PARALLEL TO THE NORTH LINE OF SAID SOUTHEAST ONE-QUARTER OF SECTION 35, A DISTANCE OF 257 FEET;
THENCE NORTH PARALLEL TO THE WEST LINE OF SAID SOUTHEAST ONE-QUARTER 660 FEET TO THE POINT OF BEGINNING.**

ALSO, THAT PORTION OF THOSE CERTAIN LANDS DESCRIBED OF RECORD IN BOOK 731, PAGE 0454, LYING SOUTH OF, ALONG AND WITHIN 16-1/2 FEET OF THE SOUTH BOUNDARY OF THE TRACT ABOVE DESCRIBED.

EXCEPTING THEREFROM THE FOLLOWING:

A TRACT OF LAND IN THE SOUTHEAST ONE-QUARTER OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST OF THE WILLAMETTE MERIDIAN, IN THE COUNTY OF WASHINGTON AND STATE OF OREGON, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

BEGINNING AT A 5/8 INCH ROD AND CAP ON THE CENTER LINE OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST OF THE WILLAMETTE MERIDIAN, IN THE COUNTY OF WASHINGTON AND STATE OF OREGON, SITUATED NORTH 89°41'41" EAST, 379.00 FEET FROM THE MONUMENT MARKING THE CENTER OF SAID SECTION 35;
THENCE NORTH 89° 41' 41" EAST, 172.00 FEET TO A 5/8 INCH ROD AND CAP;
THENCE SOUTH 0° 05' 16" EAST, 262.00 FEET PARALLEL WITH THE WEST LINE OF THE SOUTHEAST ONE-QUARTER OF SAID SECTION 35 TO A 5/8 INCH ROD AND CAP;
THENCE SOUTH 89° 41' 41" WEST, 110.00 FEET TO A 5/8 INCH ROD AND CAP;
THENCE NORTH 53° 03' 41" WEST, 77.67 FEET TO A 5/8 INCH ROD AND CAP;
THENCE NORTH 0° 05' 16" WEST 215.00 FEET TO THE POINT OF BEGINNING.

ALSO EXCEPTING THEREFROM THAT CERTAIN PARCEL OF LAND DESCRIBED IN DEED TO WILLIAM GORDON MOORE RECORDED AUGUST 03, 1972 IN BOOK 880, PAGE 0735, RECORDS OF WASHINGTON COUNTY, OREGON.

THE LEGAL DESCRIPTION WAS CREATED PRIOR TO JANUARY 01, 2008.

PARCEL II:

A TRACT OF LAND LOCATED IN THE NORTHEAST ONE-QUARTER OF SECTION 25, TOWNSHIP 2 SOUTH, RANGE 1 WEST OF THE WILLAMETTE MERIDIAN, IN THE CITY OF TUALATIN, COUNTY OF WASHINGTON, AND STATE OF OREGON, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

BEGINNING AT A 2-INCH IRON PIPE ON THE WEST LINE OF THE NORTHEAST ONE-QUARTER OF SAID SECTION MARKING THE NORTHWEST CORNER OF LOT 105, SANDHURST NO. 2 [PLAT BOOK 47, PAGE 0032], A PLAT OF RECORD;
THENCE ALONG SAID ONE-QUARTER SECTION LINE NORTH 0° 09' 28" EAST, 230.00 TO THE TRUE POINT OF BEGINNING;
THENCE CONTINUING ALONG SAID LINE, NORTH 0° 09' 28" EAST, 661.34 FEET TO THE SOUTH RIGHT OF WAY LINE OF SOUTHWEST SAGERT STREET (COUNTY ROAD NO. 2430) AS WIDENED FOR THE SAGERT STREET OVERPASS CROSSING THE O.D.O.T. I-5 HIGHWAY;
THENCE ALONG SAID LINE, NORTH 83° 07' 49" EAST 443.75 FEET;
THENCE NORTH 89° 38' 02" EAST, 153.21 FEET TO A POINT ON THE WESTERLY RIGHT OF WAY LINE OF SOUTHWEST 72ND AVENUE AS PLATTED PER SAID SANDHURST NO. 2 [PLAT BOOK 47, PAGE 0032];
THENCE ALONG SAID LINE, SOUTH, A DISTANCE OF 210.00 FEET;
THENCE LEAVING SAID LINE, WEST A DISTANCE OF 175.72 FEET;

APN: 2S132B800700

Statutory Quitclaim Deed
- continued

File No.: NCS-744201-STLO (LS)

**THENCE SOUTH 57° 21' 18" WEST, 58.58 FEET;
THENCE SOUTH 25° 27' 48" WEST, 81.30 FEET;
THENCE SOUTH 4° 00' 00" EAST, 100.00 FEET;
THENCE SOUTH 21° 45' 18" EAST, 65.00 FEET;
THENCE SOUTH A DISTANCE OF 55.00 FEET;
THENCE SOUTH 63° 11' 36" WEST, 410.80 FEET TO THE POINT OF BEGINNING.**

THE LEGAL DESCRIPTION WAS CREATED PRIOR TO JANUARY 01, 2008.

Neighborhood / Developer Meeting

April 1, 2024

RE: 9300 SW Norwood Road Tualatin OR 97062
Proposed: Rezone from Institutional to RML (Medium Low Density Residential) with Comprehensive Plan Map Amendment and Subdivision for Residential Housing with Architectural Review

Dear Property Owner/Resident:

Westlake Consultants, Inc. is representing Norwood Horizon Holdings for the property located at 9300 SW Norwood Road, Tualatin, OR 97062. The site is approximately 9.3 acres in size and includes Tax Lot 108 (1 acre) and a portion of Tax Lot 106 (8.3 acres), both on Tax Map 2S135D – see maps provided on the reverse side of this letter – and visit our project website:

[We're Listening | SW Norwood Rd NORWOODHOUSING.COM](https://www.norwoodhousing.com)

As per the series of community meetings we have held since last August discussing this site, we will be applying for formal land use approvals (i) rezoning from Institutional to Medium Low Density Residential (RML), including a comprehensive plan map amendment, (ii) subdividing the site for residential homes, and (iii) architectural review of the proposed housing. Prior to applying to the City of Tualatin, we would like to take the opportunity to discuss the proposal in more detail with you.

You are invited to attend an in-person meeting:

Wednesday April 17th, 2024 7:00 p.m.
In the Community Room at Marquis Tualatin
19805 SW Boones Ferry Road Tualatin, OR 97062

The purpose of this meeting is to provide a forum for the Applicant and surrounding Property Owners/Residents to review the proposal and to identify issues so that they can be considered before formal land use applications are submitted to the City. This meeting gives you the opportunity to share with us any special information you know about the property involved. We will attempt to answer questions which may be relevant to our project.

Please note this meeting will be an informational meeting on preliminary development plans. These plans may be altered prior to submittal of the applications to the City of Tualatin.

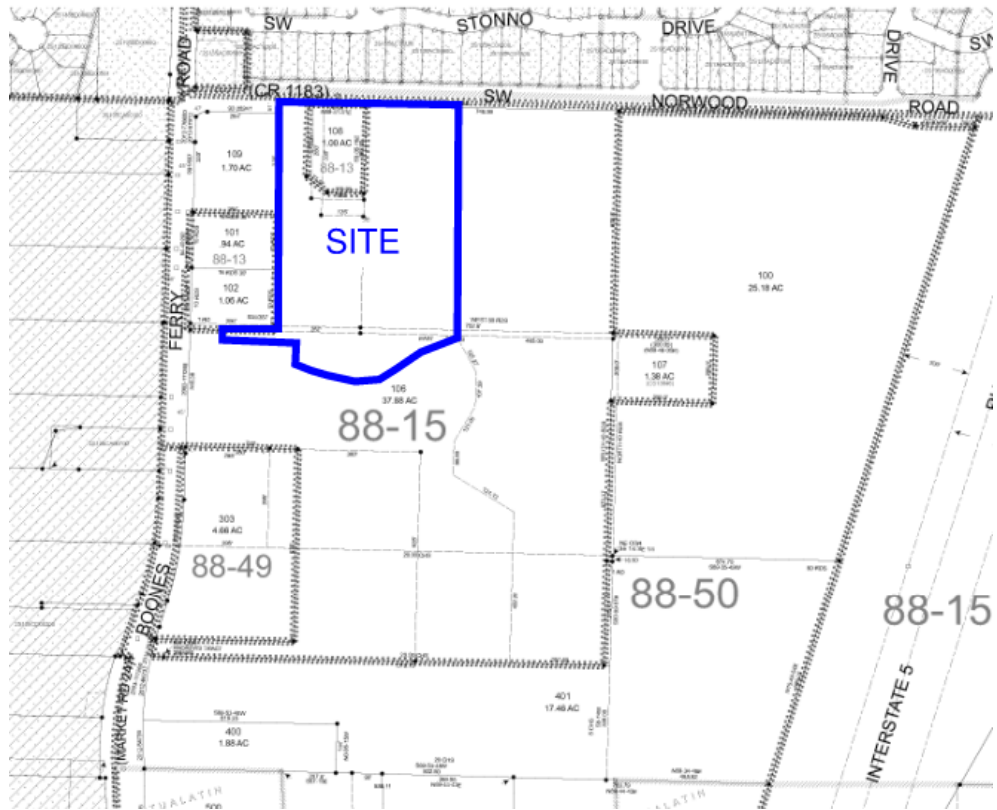
We look forward to more specifically discussing the proposal with you. Contact me at 503-684-0652 or ksandblast@westlakeconsultants.com if you have questions.

Sincerely,



Kenneth Sandblast, AICP
Director of Planning

SITE LOCATION MAP



SITE ZONING MAP



2S135BD10200	ZHANG SHANE XUE YUAN & ZHANG YUAN	22604 SW 96TH DR	TUALATIN	OR	97062
2S135AC12300	ZACHER BRIAN M & ZACHER MICHAELA F	9325 SW QUINAULT LN	TUALATIN	OR	97062
2S135AC05900	YOUNG DOUGLAS A & YOUNG TERESA S	987 SOLANA CT	MOUNTAIN VIEW	CA	94040
2S135AC02200	YEE DONALD M & YEE PAMELA E	9105 SW STONO DR	TUALATIN	OR	97062
2S135AD04500	YARNELL AARON	22620 SW 87TH PL	TUALATIN	OR	97062
2S135AD08900	WORKMAN STEPHEN G & WORKMAN MARY B	8810 SW STONO DR	TUALATIN	OR	97062
2S135AD09800	WOOLSEY RANDY M & WOOLSEY DONNA J	8775 SW STONO DR	TUALATIN	OR	97062
2S135AC15700	WOODRUFF VIRGINIA C	22740 SW 93RD TER	TUALATIN	OR	97062
2S135AC16600	WONG JONATHAN D & WONG BETH J	9345 SW STONO DR	TUALATIN	OR	97062
2S135AD14900	WISER BRIAN R & LIRA MARIA ALEJANDRA	22845 SW 89TH PL	TUALATIN	OR	97062
2S135BC00400	WISER THOMAS WAYNE & WISER DIANE MARIE	22750 SW MIAMI DR	TUALATIN	OR	97062
2S135BD01900	WISE ROBERT C & WISE SUSAN M	9875 SW LUMBEE LN	TUALATIN	OR	97062
2S135AC03600	WILSON DAVID L & WILSON KAREN A	22750 SW 92ND PL	TUALATIN	OR	97062
2S135AD08400	WILLIAMS MEGANN E & WILLIAMS AUSTIN J	8830 SW STONO DR	TUALATIN	OR	97062
2S135D000108	WILLIAMS TOM K	9300 SW NORWOOD RD	TUALATIN	OR	97062
2S135BD01500	WHITT JASON & WHITT MELANIE	9745 SW IOWA DR	TUALATIN	OR	97062
2S135BD06600	WHITE RYAN K & WHITE BRENNAN R	22930 SW ERIO PL	TUALATIN	OR	97062
2S135AD09500	WHEELER TERRANCE J & WHEELER LINDA K	8745 SW STONO DR	TUALATIN	OR	97062
2S135AD02200	WELCH RAYMOND P & WELCH PAMELA K	8575 SW MARICOPA DR	TUALATIN	OR	97062
2S135AD05700	WELBORN RANDALL J & JULIE ANN WELBORN LIV TRUST	22885 SW VERMILLION DR	TUALATIN	OR	97062
2S135AD07100	WEGENER RODNEY R	8882 SW STONO DR	TUALATIN	OR	97062
2S135AD08401	WASHINGTON COUNTY FACILITIES MGMT	169 N 1ST AVE #42	HILLSBORO	OR	97124
2S135AC02700	WADSWORTH ERIC & WADSWORTH WENDY	9265 SW STONO DR	TUALATIN	OR	97062
2S135CA00300	VUKANOVICH MARK	23155 SW BOONES FERRY RD	TUALATIN	OR	97062
2S135BD05100	VICTORIA WOODS OWNERS COMMITTEE	PO BOX 1282	TUALATIN	OR	97062
2S135AC01000	VETETO NANCY LIV TRUST	9220 SW STONO DR	TUALATIN	OR	97062
2S135CA00200	VENABLES JOHN V TRUST	6140 SW BOUNDARY ST APT 145	PORTLAND	OR	97221
2S135AC07300	VELAZQUEZ BRIAN A & VELAZQUEZ CHRISTINA RALSTON	9325 SW PALOUSE LN	TUALATIN	OR	97062
2S135AD12300	VANDEBURG SUSAN B & VANDERBURG JOHN TIMOTHY REV	21715 SW HEDGES DR	TUALATIN	OR	97062
2S135AD05200	TURNER BENJAMIN & PERKINS EMILY A	22745 SW VERMILLION DR	TUALATIN	OR	97062
2S135AC12000	TURNBULL BRENT D	9340 SW IOWA DR	TUALATIN	OR	97062
2S135D000107	TUALATIN CITY OF	18880 SW MARTINAZZI AVE	TUALATIN	OR	97062
2S135D000109	TUALATIN HILLS CHRISTIAN CHURCH INC	23050 SW BOONES FERRY RD	TUALATIN	OR	97062
2S135BD01400	TROYER KENNETH A & VALERIE LEE REV LIV TRUST	24548 SW QUARRYVIEW DR	WILSONVILLE	OR	97070
2S135AC09000	TROTMAN NEIL	9385 SW IOWA DR	TUALATIN	OR	97062
2S135AC04200	TRIKUR MARTA LUIZA & TRIKUR SERGEY F	22775 SW 90TH PL	TUALATIN	OR	97062
2S135AD02600	TRICKETT AARON & TRICKETT HEATHER	22580 SW VERMILLION DR	TUALATIN	OR	97062
2S135AD15100	TRAN NICHOLAS	8983 SW STONO DR	TUALATIN	OR	97062
2S135AD02700	TOMPKINS TIMOTHY L & TOMPKINS RACHEL N	22570 SW VERMILLION DR	TUALATIN	OR	97062
2S135AD03000	TOLER E TRENT & TOLER ROSEANN T	22595 SW 87TH PL	TUALATIN	OR	97062
2S135BD10100	TOJONG EDWARD & TOJONG MARISSA	9549 SW IOWA DR	TUALATIN	OR	97062
2S135A000700	TIGARD-TUALATIN SCHOOL DISTRICT #23J	6960 SW SANDBURG ST	TIGARD	OR	97223

2S135AC02300	THURLEY CHRISTOPHER	9135 SW STONO DR	TUALATIN	OR	97062
2S135BD00900	THORSTENSON PEDER H & THORNSTENSON KATHLEEN M	9580 SW IOWA DR	TUALATIN	OR	97062
2S135AC01300	THOMPSON JOYCE A	9120 SW STONO DR	TUALATIN	OR	97062
2S135BC00300	THOMAS SCOTT & THOMAS CARRIE	22770 SW MIAMI DR	TUALATIN	OR	97062
2S135AC06700	TAYLOR FLORDELIZA J	22535 SW 94TH TER	TUALATIN	OR	97062
2S135AC13500	TAYLOR BRENDA & TAYLOR JOE N	22885 SW 94TH TER	TUALATIN	OR	97062
2S135AD04800	TAYLOR ARTHUR R & MANANDIL MYLYN	22675 SW VERMILLION DR	TUALATIN	OR	97062
2S135AC06400	TAPASA HEIDI L & TAPASA TUUMAMAO	22605 SW 94TH TER	TUALATIN	OR	97062
2S135AC02800	TAM AARON L M & TAM AMY	9250 SW IOWA DR	TUALATIN	OR	97062
2S135BD01100	TAKALLOU MOJTABA B & AMINI AFSANEH	9625 SW IOWA DR	TUALATIN	OR	97062
2S135AD10800	SYVERSON FAMILY LIV TRUST	8895 SW IOWA DR	TUALATIN	OR	97062
2S135AC03100	SUTHERLAND STUART P & SUTHERLAND LEEANN N FAM TRU	22805 SW 92ND PL	TUALATIN	OR	97062
2S135AC05600	STUART JAMES W & STUART HOLLY V	9235 SW IOWA DR	TUALATIN	OR	97062
2S135AC05500	STRATTON GILLIAN M LIVING TRUST	9195 SW IOWA DR	TUALATIN	OR	97062
2S135AD09600	STONE LEAH	8755 SW STONO DR	TUALATIN	OR	97062
2S135AD06800	STIMSON TOM P & GUTIERREZ-STIMSON ERINN M	8894 SW STONO DR	TUALATIN	OR	97062
2S135AD10300	STILLS DANNY T & STILLS DEBRA J	3498 CHAPARREL LOOP	WEST LINN	OR	97068
2S135BD01200	STACKLIE TIM & KAREN LIV TRUST	9655 SW IOWA DR	TUALATIN	OR	97062
2S135AC12800	ST CLAIR DEBORAH J LIVING TRUST	9375 SW QUINAULT LN	TUALATIN	OR	97062
2S135AC15300	SPENCER EVERETT & SPENCER LORRIE HEAPE	22830 SW 93RD TER	TUALATIN	OR	97062
2S135AC13800	SPECHT-SMITH DANA LYNN & SPECHT DAVID LEE	9380 SW QUINAULT LN	TUALATIN	OR	97062
2S135BD06100	SPACKMAN KENT A & SPACKMAN DONNA J	22915 SW ERIO PL	TUALATIN	OR	97062
2S135AC09100	SOMERTON RITA G & SOMERTON MARVIN	9375 SW IOWA DR	TUALATIN	OR	97062
2S135AC11500	SNODDY ROBERT B	9430 SW IOWA DR	TUALATIN	OR	97062
2S135AD15000	SMITH WILLIAM R & SMITH BARBARA J	22865 SW 89TH PL	TUALATIN	OR	97062
2S135BD03500	SMITH GREGORY D & LINDA S REV TRUST	9930 SW LUMBEE LN	TUALATIN	OR	97062
2S135AD02000	SIROIS TYSON & JARRARD LINDSEY	22500 SW PINTO DR	TUALATIN	OR	97062
2S135BD03400	SIMMONS LINDA C TRUST	22920 SW MIAMI PL	TUALATIN	OR	97062
2S135AD10000	SHOBAKEN THOMAS R	8795 SW STONO CT	TUALATIN	OR	97062
2S135AC09200	SHIPLEY HEATHER	9355 SW IOWA DR	TUALATIN	OR	97062
2S135AC06200	SHIMADA HIROSHI & SHIMADA ANGELIQUE	22645 SW 94TH TER	TUALATIN	OR	97062
2S135AC05400	SHEETZ DONALD K & MARY M SHEETZ REV LIV TRUST	9155 SW IOWA DR	TUALATIN	OR	97062
2S135BC00900	SHEARER THOMAS M & CHERIE M SHEARER FAMILY TRUST	22595 SW MIAMI DR	TUALATIN	OR	97062
2S135D000102	SHAVLOVSKIY VITALIY & SHAVLOVSKIY NATALIA	32031 SW GUISS WAY	WILSONVILLE	OR	97070
3S102B000104	SHAMBURG SCOTT A	PO BOX 908	WILSONVILLE	OR	97070
2S135AC01200	SEPP JULIE & SEPP ROBERT	9150 SW STONO DR	TUALATIN	OR	97062
2S135AD11200	SELIVONCHICK GREGORY A & SELIVONCHICK GEORGANNE	8945 SW IOWA DR	TUALATIN	OR	97062
2S135AD03200	SEKI KATSUMICHI & SEKI MIYUKI	22625 SW 87TH PL	TUALATIN	OR	97062
2S135AA02300	SCOTT THOMAS M	22436 SE PIMA AVE	TUALATIN	OR	97062
2S135AC03900	SCOTT JERRY MICHAEL & STAMBAUGH DEBRA R	9080 SW IOWA DR	TUALATIN	OR	97062
2S135AC08900	SCHWEITZ ERIC J & SCHWEITZ KAREN M	9390 SW SKOKOMISH LN	TUALATIN	OR	97062
2S135AD11600	SCHULTZ LARRY & JOANN REV LIV TRUST	8890 SW IOWA DR	TUALATIN	OR	97062

2S135BD06000	SCHREIBER FAMILY TRUST	22885 SW ERIO PL	TUALATIN	OR	97062
2S135AD01500	SCHOTT DAVID M & SCHOTT COURTNEY A	22690 SW VERMILLION DR	TUALATIN	OR	97062
2S135AD08200	SCHAFROTH J F & SCHAFROTH KATE R	8838 SW STONO DR	TUALATIN	OR	97062
2S135AC04300	SAYLOR ERIC M & SAYLOR BRITTA M	22835 SW 90TH PL	TUALATIN	OR	97062
2S135AD10700	SAWAI STUART T & SAWAI MARY JANE	8891 SW IOWA DR	TUALATIN	OR	97062
2S135AC06800	SANDSTROM GLENN M	9405 SW PALOUSE LN	TUALATIN	OR	97062
2S135BD04500	SABIDO ROBERT & SABIDO JENNIFER M	9760 SW IOWA DR	TUALATIN	OR	97062
2S135AC14200	RUDISEL A TRUST	PO BOX 1667	LAKE OSWEGO	OR	97035
2S135BC01300	ROSE THEODORE & ROSE SHANNON	22765 SW MIAMI DR	TUALATIN	OR	97062
2S135AD07400	RONALD TY & RONALD JENNIFER	8870 SW STONO DR	TUALATIN	OR	97062
2S135AD00300	ROMINE CLAUDIA	22980 SW VERMILLION	TUALATIN	OR	97062
2S135AC08000	ROGERS JOHN & AGUILAR-NELSON LIZI	15309 NW DECATUR WAY	PORTLAND	OR	97229
2S135BD01800	ROBERTS CHRISTOPHER T & ROBERTS KELLY J	9855 SW LUMBEE LN	TUALATIN	OR	97062
2S135CA00600	RILEY SHAWN O	23365 SW BOONES FERRY RD	TUALATIN	OR	97062
2S135BD03300	RICHTER FAMILY JOINT TRUST	22930 SW MIAMI PL	TUALATIN	OR	97062
2S135BC00700	RICHARDS MARK R & RICHARDS JILL E	22600 SW MIAMI DR	TUALATIN	OR	97062
2S135AC08700	RHONDES ERIK & RHODES MEGAN	9360 SW SKOKOMISH LN	TUALATIN	OR	97062
2S135AC03000	REYNHOLDS GLENN A & REYNHOLDS NANCY J	22795 SW 92ND PL	TUALATIN	OR	97062
2S135AC15400	REPCAK ROMAN & PARK-REPCAK ROBIN	22810 SW 93RD TER	TUALATIN	OR	97062
2S135AC06000	RAZ DOUGLAS JOHN	22685 SW 94TH TER	TUALATIN	OR	97062
2S135AD07200	RAY CYNTHIA P	8878 SW STONO DR	TUALATIN	OR	97062
2S135BC01400	RANSOM ANNIE M & RANSOM BRADLEY EDWARD	22785 SW MIAMI DR	TUALATIN	OR	97062
2S135AD09200	RAMKU FAMILY TRUST	14193 NW MEADOWRIDGE DR	PORTLAND	OR	97229
2S135AC09900	RAMIREZ JOSE ANTONIO & RAMIREZ SILVIA	22560 SW 94TH TER	TUALATIN	OR	97062
2S135AD12000	QIAN LIDONG & YANG YUYUAN	8815 SW STONO DR	TUALATIN	OR	97062
2S135BD03600	POWELL MATTHEW & POWELL LAUREN	22835 SW ENO PL	TUALATIN	OR	97062
2S135BD02900	POTTLE KEITH W & POTTLE DARCY A	PO BOX 1996	TUALATIN	OR	97062
2S135CA00700	POTTER DYLAN D & POTTER MICHELLE P	23405 SW BOONES FERRY RD	TUALATIN	OR	97062
2S135AD10500	PITT CHARLES R	8883 SW IOWA DR	TUALATIN	OR	97062
2S135AC15500	PIRTLE JAMES L JR & PIRTLE LINDA L	22780 SW 93RD TER	TUALATIN	OR	97062
2S135AD05400	PIERCE KELLY JOANNE & PIERCE BRIAN LAWRENCE	8675 SW STONO DR	TUALATIN	OR	97062
2S135BD06400	PICKETT R DEAN & PICKETT E RAYLEA	22995 SW ERIO PL	TUALATIN	OR	97062
2S135AC07600	PFEIFER STEPHANIE B	22530 SW 93RD TER	TUALATIN	OR	97062
2S135BC01500	PETRIDES PAMELA LIVING TRUST & PETRIDES PHILLIP LIVING	22815 SW MIAMI DR	TUALATIN	OR	97062
2S135AD12200	PERRY JANETTE & PERRY KENNETH	8885 SW STONO DR	TUALATIN	OR	97062
2S135BD03800	PENA ZACHARY G & PENNA TIFFANY R	22865 SW ENO PL	TUALATIN	OR	97062
2S135AC04400	PEEBLES CRAIG M & PEEBLES TANYA A	22840 SW 90TH PL	TUALATIN	OR	97062
2S135AC00800	PATTON ANDREW M & PATTON LINDSEY M	9270 SW STONO DR	TUALATIN	OR	97062
2S135AC11900	PAROSA JOSHUA DAVID	9360 SW IOWA DR	TUALATIN	OR	97062
2S135BD03700	PARKER ETHAN T & PARKER JAMIE L	22855 SW ENO PL	TUALATIN	OR	97062
2S135D000100	P3 PROPERTIES LLC	PO BOX 691	WHITE SALMON	WA	98672
2S135BC00800	OWENS RICHARD D & OWENS VALERIE D	22580 SW MIAMI DR	TUALATIN	OR	97062

2S135BD02800	OWENS CLINTON MICHAEL SHOOK	9965 SW LUMBEE LN	TUALATIN	OR	97062
2S135AC14400	OSTROWSKI MICHAEL J & OSTROWSKI SHERIE M	9370 SW STONO DR	TUALATIN	OR	97062
2S135AD02100	ORLANDINI ANTHONY J & ORLANDINI JUDY R	8555 SW MARICOPA DR	TUALATIN	OR	97062
2S135AC06300	O'NEAL DANNY F & O'NEAL JONI L	22625 SW 94TH TER	TUALATIN	OR	97062
2S135AD02300	OLIVERA APOLINAR & OLIVERA DEBBIE & WHITWORTH DAVID	22640 SW VERMILLION DR	TUALATIN	OR	97062
3S102B000105	ODOMS LIVING TRUST	PO BOX 2446	TUALATIN	OR	97062
2S135AC03400	NOYES PATRICK A & THOMPSON CAMILLIA M	22810 SW 92ND PL	TUALATIN	OR	97062
2S135AD08700	NORTH DAVID P & NORTH BARBARA	8818 SW STONO DR	TUALATIN	OR	97062
2S135BD06900	NGUYEN QUOC & NGUYEN DIANE	9660 SW IOWA DR	TUALATIN	OR	97062
2S135AD08800	NEWTON KYLE C & NEWTON HAILEY R	8814 SW STONO DR	TUALATIN	OR	97062
2S135AC09600	NEWBERRY GARY B & THOMPSON DONNA L	9295 SW IOWA DR	TUALATIN	OR	97062
2S135AC11100	NEULEIB TAMI R	9395 SW SKOKOMISH LN	TUALATIN	OR	97062
2S135AD02500	NELSON MICHAEL D & NELSON ASHLEY K	22590 SW VERMILLION DR	TUALATIN	OR	97062
2S135AD08500	NELSON KIRIN H	8826 SW STONO DR	TUALATIN	OR	97062
2S135AD08100	NELL ZACHARY D & NELL KENDRA	8842 SW STONO DR	TUALATIN	OR	97062
2S135AC14600	NEILL RACHEL & HUSUM BRENT	9350 SW STONO DR	TUALATIN	OR	97062
2S135AC03500	NEARY TIMOTHY & NEARY LUCY	22780 SW 92ND PL	TUALATIN	OR	97062
2S135AC13200	MUSIAL LUKE & MUNSEY VICTORIA	22825 SW 94TH TER	TUALATIN	OR	97062
2S135AD11800	MURPHY MICHAEL F & OLSON-MURPHY ANTONETTE K	8870 SW IOWA DR	TUALATIN	OR	97062
2S135AC04600	MULGAONKER SHAILESH S	PO BOX 367	TUALATIN	OR	97062
2S135AC08200	MUELLER RICHARD II & MUELLER MICHELLE	22660 SW 93RD TER	TUALATIN	OR	97062
2S135AD09700	MOYES DUSTIN R & MOYES CAROL L	8765 SW STONO DR	TUALATIN	OR	97062
2S135AC08500	MOSHOFKY JOHN & MOSHOFKY GINGER	9310 SW SKOKOMISH LN	TUALATIN	OR	97062
2S135BD02500	MORRIS LARRY L & MORRIS JUANITA	22745 SW ENO PL	TUALATIN	OR	97062
2S135AD07300	MORELAND BEVERLY H & MORELAND BEVERLY H LIV TRUST	753 KOTZY AVE S	SALEM	OR	97302
2S135AC01700	MOORE DAVID C & MOORE TAMMY	8990 SW STONO DR	TUALATIN	OR	97062
2S135AC14000	MOLLER THERESA	22825 SW 93RD TER	TUALATIN	OR	97062
2S135BD10300	MOEN DEBORAH & MOEN ERIK	22572 SW 96TH DR	TUALATIN	OR	97062
2S135BD04100	MIZE JOSHUA & MIZE CHRISTINE	22920 SW ENO PL	TUALATIN	OR	97062
2S135BC01700	MILSTED MAURICE SCOTT & STOVER-MILSTED SUSAN LEE	22875 SW MIAMI DR	TUALATIN	OR	97062
2S135AD08300	MILLER CAROLE D LIV TRUST	8834 SW STONO DR	TUALATIN	OR	97062
2S135BD02000	MILLER JOHN LESLIE & PLATTEAU ASTRID S	22730 SW ENO PL	TUALATIN	OR	97062
2S135BD10900	MILLER ROBERT F	22631 SW 96TH DR	TUALATIN	OR	97062
2S135AC10300	MIKULA KATERINA	9330 SW PALOUSE LN	TUALATIN	OR	97062
2S135AC07900	MICHELS ELIZABETH A	22590 SW 93RD TER	TUALATIN	OR	97062
2S135AD01600	MICHAEL SCOTT CURTIS & MICHAEL TINA FRANCINE	8580 SW MARICOPA DR	TUALATIN	OR	97062
2S135AC15100	MENES MARK A	9280 SW STONO DR	TUALATIN	OR	97062
2S135AD04200	MCREYNOLDS CHRIS & MCREYNOLDS AUDREY	22720 SW 87TH PL	TUALATIN	OR	97062
2S135AC04500	MCMANUS HEIDI	22820 SW 90TH PL	TUALATIN	OR	97062
2S135CA00800	MCLEOD TRUST	23465 SW BOONES FERRY RD	TUALATIN	OR	97062
2S135AC04900	MCLAUGHLIN NATHANIEL ANDREW & MCLAUGHLIN AREENA C	8960 SW IOWA DR	TUALATIN	OR	97062
2S135AD04900	MCKEAN AMY & MCKEAN RAYMOND	22685 SW VERMILLION DR	TUALATIN	OR	97062

2S135AC08300	MCGRADY ANDREA M	9260 SW SKOKOMISH LN	TUALATIN	OR	97062
2S135AC15800	MCGILCHRIST STEPHEN R & NYSTROM-GERDES ELIZABETH R	22720 SW 93RD TER	TUALATIN	OR	97062
2S135AD09100	MCDONOUGH JOHN MICHAEL & MCDONOUGH MAUREEN CLAI	8750 SW STONO DR	TUALATIN	OR	97062
2S135AD15200	MCCALEB KEVIN L	8950 SW IOWA DR	TUALATIN	OR	97062
2S135AD11900	MCALLISTER DENNIS C & MCALLISTER RAGNHILD	8805 SW STONO DR	TUALATIN	OR	97062
2S135CD00400	MAST MARVIN R & JELI CARLENE M	23845 SW BOONES FERRY RD	TUALATIN	OR	97062
2S135AD06400	MARTIN FAMILY TRUST	8986 SW STONO DR	TUALATIN	OR	97062
2S135AD04600	MARLEAU ALLISON P	22615 SW VERMILLION DR	TUALATIN	OR	97062
2S135AC04000	MARK HENRY & MARK CHRISTINE	22725 SW 90TH PL	TUALATIN	OR	97062
2S135AC01800	MARBLE AMANDA L TRUST	8989 SW STONO DR	TUALATIN	OR	97062
2S135AD00900	MALONEY CHERYL L	22820 SW VERMILLION DR	TUALATIN	OR	97062
2S135AD05900	MALONSON GARY D & MALONSON MARSHA L	22955 SW VERMILLION DR	TUALATIN	OR	97062
2S135AC10200	MAIER DARLA & MAIER THOMAS	9340 SW PALOUSE LN	TUALATIN	OR	97062
2S135BD00800	MAGNUSON BRENT R & MAGNUSON HEATHER A	9540 SW IOWA DR	TUALATIN	OR	97062
2S135BD07600	MAGNUSON BRENT R & MAGNUSON HEATHER A	9540 SW IOWA DR	TUALATIN	OR	97062
2S135AC13100	MADONDO JEFFRET & JOHNSON MORGAN IRENE	22795 SW 94TH TER	TUALATIN	OR	97062
2S135BC00600	MACDONALD BRIAN & MACDONALD AMELIA	22640 SW MIAMI DR	TUALATIN	OR	97062
2S135AC06500	MACCLANATHAN MELANIE & MACCLANATHAN MICHAEL	22575 SW 94TH TER	TUALATIN	OR	97062
2S135AD03100	LUSCOMBE BRUCE C TRUST	22605 SW 87TH PL	TUALATIN	OR	97062
2S135CD00302	LUCINI JOHN W & GRACE N FAM TRUST	23677 SW BOONES FERRY RD	TUALATIN	OR	97062
2S135BD11000	LOVELACE LIVING TRUST	22659 SW 96TH DR	TUALATIN	OR	97062
2S135BC00100	LORENZEN TYLER J & LORENZEN TATJANA	22820 SW MIAMI DR	TUALATIN	OR	97062
2S135BD02300	LOEN EMILY G	22655 SW ENO PL	TUALATIN	OR	97062
2S135BD01700	LIVERMORE MICHAEL G & LIVERMORE SHERYL D	9835 SW LUMBEE LN	TUALATIN	OR	97062
2S135BD05800	LINDAMAN LIVING TRUST	22805 SW ERIO PL	TUALATIN	OR	97062
2S135AC08800	LIMING JEANNE E	9380 SW SKOKOMISH LN	TUALATIN	OR	97062
2S135AD14400	LILLEY KRISTEN M & LILLEY NICHOLAS L	22800 SW 89TH PL	TUALATIN	OR	97062
2S135AD15300	LEMON CHASE ANTHONY & LEMON HEIDI	8940 SW IOWA DR	TUALATIN	OR	97062
2S135BD02700	LEEPER AVA J	9945 SW LUMBEE LN	TUALATIN	OR	97062
2S135AC07200	LEE WILLIAM B REV LIV TRUST	37301 28TH AVE S UNIT 65	FEDERAL WAY	WA	98003
2S135AD08600	LEE FLORENCE & YAM WAI LUN	8822 SW STONO DR	TUALATIN	OR	97062
2S135AC05700	LATHROP JEFFREY A & LATHROP MARIA M	9265 SW IOWA DR	TUALATIN	OR	97062
2S135AC13300	LARSON ANDREW & WISEMAN LEAH DANIELLE	22845 SW 94TH TER	TUALATIN	OR	97062
2S135AC14100	LARA SALVADOR	22845 SW 93RD TER	TUALATIN	OR	97062
2S135AD05600	LAM DAVID & NGUYEN BETH NGOC BICH	8700 SW STONO DR	TUALATIN	OR	97062
2S135AC06100	LACEY LONNIE D & LACEY LORI A	22665 SW 94TH TER	TUALATIN	OR	97062
2S135BC01600	KREIS JOHN K	22835 SW MIAMI DR	TUALATIN	OR	97062
2S135AD09400	KNUDSON THOMAS & KNUDSON LINDA SALYERS	8725 SW STONO DR	TUALATIN	OR	97062
2S135BD03200	KNOX FAMILY TRUST	22950 SW MIAMI PL	TUALATIN	OR	97062
2S135AD07800	KLOSSNER ANDREW J	8854 SW STONO DR	TUALATIN	OR	97062
2S135BD01300	KLEPS MARK G & KLEPS LINDSAY K	9675 SW IOWA DR	TUALATIN	OR	97062
2S135AD03300	KLAUSS CYDNI M	22635 SW 87TH PL	TUALATIN	OR	97062

2S135AC10600	KIS JUAN ANTONIO & KIS CLAUDIA	22615 SW 93RD TER	TUALATIN	OR	97062
2S135BD10800	KIRK CHRISTINE A & HOFF JAMES A	22611 SW 96TH DR	TUALATIN	OR	97062
2S135AD09000	KINNAMAN JEFFREY B & KINNAMAN JENNIFER D	8780 SW STONO DR	TUALATIN	OR	97062
2S135CD00200	KIMMEL RONALD A & KIMMEL REBECCA A	23605 SW BOONES FERRY RD	TUALATIN	OR	97062
2S135BD10700	KIM KYU & KIM MELISSA	22589 SW 96TH DR	TUALATIN	OR	97062
2S135BD00501	KHAN SOHAIL & FARZANA LIV TRUST	2919 BEACON HILL DR	WEST LINN	OR	97068
2S135BD00600	KHAN SOHAIL & FARZANA LIV TRUST	2919 BEACON HILL DR	WEST LINN	OR	97068
2S135AD07900	KERNER ROBERT	8850 SW STONO DR	TUALATIN	OR	97062
2S135AC11400	KERN KEVIN	9450 SW IOWA DR	TUALATIN	OR	97062
2S135AD03600	KENNEDY MICHAEL C & KENNEDY LINDA M	22735 SW 87TH PL	TUALATIN	OR	97062
2S135BC01200	KAUFFMAN FAMILY TRUST	22725 SW MIAMI DR	TUALATIN	OR	97062
2S135AD00500	KARIS ALEXANDER DONALD	22930 SW MANDAN DR	TUALATIN	OR	97062
2S135AD02900	KALATEH EBRAHIM SHIRDOOST & DOOST NOOSHIN NEZAM	22585 SW 87TH PL	TUALATIN	OR	97062
2S135AC13700	JORGENSEN HEATHER & JORGENSEN COLBIE	9375 SW STONO DR	TUALATIN	OR	97062
2S135AC16400	JOHNSON FLETCHER & JOHNSON CHRISTINA	9365 SW STONO DR	TUALATIN	OR	97062
2S135AC00900	JENKINS PHILIP D & JENKINS KRISTEN K	9240 SW STONO DR	TUALATIN	OR	97062
2S135AC05300	JASTRAM WILLIAM E & JASTRAM CHRISTINE A	9015 SW IOWA DR	TUALATIN	OR	97062
2S135AC10100	JACOBS JEFFREY W	9360 SW PALOUSE LN	TUALATIN	OR	97062
2S135AD03800	INGRAM CLIFFORD KEITH & INGRAM ELISABETH JOY	22785 SW 87TH PL	TUALATIN	OR	97062
2S135AD00800	HYRE TIMOTHY R & HYRE ANNILEE D	22840 SW VERMILLION DR	TUALATIN	OR	97062
2S135AC03300	HUMPHREY MARGIE LIV TRUST	22820 SW 92ND PL	TUALATIN	OR	97062
2S135AD10200	HUMPHREY SUSAN E	8801 SW STONO DR	TUALATIN	OR	97062
2S135AD07500	HUALA ROBIN PATRICK	14607 NE 57TH ST	BELLEVUE	WA	98007
2S135AC00500	HOWE WARREN & YUHAS-HOWE HEATHER	9495 SW NORWOOD RD	TUALATIN	OR	97062
2S135D000106	HORIZON COMMUNITY CHURCH	PO BOX 2690	TUALATIN	OR	97062
2S135AC01900	HOOVER DAN M	8993 SW STONO DR	TUALATIN	OR	97062
2S135AC08600	HOLDBROOK-DADSON DENISE	9330 SW SKOKOMISH LN	TUALATIN	OR	97062
2S135AC02600	HODGE KENNETH M	9235 SW STONO DR	TUALATIN	OR	97062
2S135BD04400	HINES MICHAEL A & HINES MARLENE R	9730 SW IOWA DR	TUALATIN	OR	97062
2S135BD01000	HILL DEREK & HILL CYNTHIA	9600 SW IOWA DR	TUALATIN	OR	97062
2S135CD00500	HICKOK TODD J & HICKOK MOLLY J	23855 SW BOONES FERRY RD	TUALATIN	OR	97062
2S135AD05300	HEYER TRUST	22775 SW VERMILLION DR	TUALATIN	OR	97062
2S135AC14500	HERRERA FERNANDO & HERRERA MARIA D	9360 SW STONO DR	TUALATIN	OR	97062
2S135CA00100	HELMS DANIEL M	23035 SW BOONES FERRY RD	TUALATIN	OR	97062
2S135AC04800	HEIRONIMUS JULIE A & VALLECK GEORGE D	22710 SW 90TH PL	TUALATIN	OR	97062
2S135AC02500	HAUDBINE PATRICK E & HAUDBINE DELEE H	9215 SW STONO DR	TUALATIN	OR	97062
2S135AD04700	HATCHER THOMAS W & HATCHER ELIZABETH A	22645 SW VERMILLION DR	TUALATIN	OR	97062
2S135BD05900	HASLAM KENNETH A & HASLAM JESSICA J	22825 SW ERIO PL	TUALATIN	OR	97062
2S135BC00200	HASBROOK WILLIAM B & HASBROOK TRICIA	22790 SW MIAMI DR	TUALATIN	OR	97062
2S135AD06600	HARRISON LIV TRUST	8976 SW STONO DR	TUALATIN	OR	97062
2S135AC06900	HANAWA IWAO & HANAWA LAURIE	3528 CHEROKEE CT	WEST LINN	OR	97068
2S135AD05100	HAMM STEVEN & HAMM SANDRA	22725 SW VERMILLION DR	TUALATIN	OR	97062

2S135AD04100	HAMILTON GEORGE & ALICE TRUST	22740 SW 87TH PL	TUALATIN	OR	97062
2S135BD02200	HALLVIK BRUCE D & HALLVIK PAMELA S	22640 SW ENO PL	TUALATIN	OR	97062
2S135AC02100	HALL SCOTT & HALL BETH	9065 SW STONO DR	TUALATIN	OR	97062
2S135BD09800	HACKENBRUCK JERRY ALDEN & LINDA JOAN REV TRUST	22680 SW 96TH DR	TUALATIN	OR	97062
2S135BD11100	GUYETTE JONATHAN & GUYETTE REBECCA	22673 SW 96TH DR	TUALATIN	OR	97062
2S135AD10900	GUERRA FILEMON M JR & QUIRANTE MALINDA	8899 SW IOWA DR	TUALATIN	OR	97062
2S135AD05800	GRIFFITH DWIGHT A & GRIFFITH H KAY	22905 SW VERMILLION DR	TUALATIN	OR	97062
2S135AD06700	GRIFFITH NOEL T JR & GRIFFITH ANGELA R	8898 SW STONO DR	TUALATIN	OR	97062
2S135BC01100	GREGSON N DEAN & GREGSON DEBORAH U	22675 SW MIAMI DR	TUALATIN	OR	97062
2S135AD01700	GREEN JUSTIN J	8560 SW MARICOPA DR	TUALATIN	OR	97062
2S135BD06500	GRANDON JOINT TRUST	22980 SW ERIO PL	TUALATIN	OR	97062
2S135AC05200	GOUY PHIL	8995 SW IOWA DR	TUALATIN	OR	97062
2S135BD04800	GOODY GREGORY & GOODY BRITTANY	22830 SW ENO PL	TUALATIN	OR	97062
2S135AC04100	GOFORTH NATHAN L & TAAFFE JULIA C	22755 SW 90TH PL	TUALATIN	OR	97062
2S135AD14600	GLASS BRIAN D & GLASS LEAH M	8900 SW SWEET DR #537	TUALATIN	OR	97062
2S135AC05000	GLAESER CHARLES W & GLAESER CHRISTA M	8955 SW IOWA DR	TUALATIN	OR	97062
2S135BD04200	GILLIHAN THOMAS M TRUST	22870 SW ENO PL	TUALATIN	OR	97062
2S135BC00500	GILLARD DAVID J & GILLARD SHELLIE S	22680 SW MIAMI DR	TUALATIN	OR	97062
2S135AC12200	GILCHRIST BEVERLY & GILCHRIST ROLAND T	9310 SW IOWA ST	TUALATIN	OR	97062
2S135AD04300	GILBERT CHRISTOPHER S & GILBERT TAYLOR A	22680 SW 87TH PL	TUALATIN	OR	97062
2S135AC12600	GISS SIMONE ELISABETH & IVERSON SEAN PATRICK	9355 SW QUINAULT LN	TUALATIN	OR	97062
2S135AD11500	GIACCHI ROBYN M	8900 SW IOWA DR	TUALATIN	OR	97062
2S135AD14800	GHODS SHAWN M & GHODS JENNA N	22815 SW 89TH PL	TUALATIN	OR	97062
2S135AC09300	GEORGE TIMOTHY P & GEORGE BETHANY	9335 SW IOWA DR	TUALATIN	OR	97062
2S135BD02400	GEORGE REV LIV TRUST	22695 SW ENO PL	TUALATIN	OR	97062
2S135AD01800	GENSLER KRISTOPHER & GENSLER MARIAH	8540 SW MARICOPA DR	TUALATIN	OR	97062
2S135BD03100	GARRETT RYAN P & GARRETT KELLY E	22970 SW MIAMI PL	TUALATIN	OR	97062
2S135AC06600	GARIBAY JAIME	22555 SW 94TH TER	TUALATIN	OR	97062
2S135BD10400	GANEY DANIEL T & BELLINGHAM TAUNI A	22556 SW 96TH DR	TUALATIN	OR	97062
2S135AD01100	GAMACHE ROBERT R & GAMACHE CHERI M	22770 SW VERMILLION DR	TUALATIN	OR	97062
2S135AD06000	GALVER ROBERTO & GALVER PATRICIA BYRNE	22995 SW VERMILLION DR	TUALATIN	OR	97062
2S135AC12700	FULLER ERIC M & FULLER XIAOYAN	9365 SW QUINAULT LN	TUALATIN	OR	97062
2S135AC02400	FRY ALBERTA A TRUST	9175 SW STONO DR	TUALATIN	OR	97062
2S135AD04400	FRONIUS JOHN A & FRONIUS SUSAN A	22650 SW 87TH PL	TUALATIN	OR	97062
2S135BD03900	FRITTS MICHELLE M & FRITTS BRETT C	22945 SW ENO PL	TUALATIN	OR	97062
2S135AC02000	FRIBLEY SARAH E & FRIBLEY CHAD C	9005 SW STONO DR	TUALATIN	OR	97062
2S135AC01400	FRENCH RODERICK LEE & FRENCH THERESE LYNN	9080 SW STONO DR	TUALATIN	OR	97062
2S135AC09700	FRAZIER FAMILY LLC	22830 SW 89TH PL	TUALATIN	OR	97062
2S135AD14300	FRAZIER JOHN D IV & FRAZIER WANDA R	22830 SW 89TH PL	TUALATIN	OR	97062
2S135AC10800	FRAVEL LINDA SHAW TRUST	9365 SW SKOKOMISH LN	TUALATIN	OR	97062
2S135AC04700	FRANKS TERRENCE D	22730 SW 90TH PL	TUALATIN	OR	97062
2S135AC03800	FRANCIS FRANK J & FRANCIS HELEN MARIE	9130 SW IOWA DR	TUALATIN	OR	97062

2S135AC10700	FRANCIS KATHLEEN	9345 SW SKOKOMISH LN	TUALATIN	OR	97062
2S135AD00600	FOSSE PATRICIA J & FOSSE RANDY C	22925 SW MANDAN DR	TUALATIN	OR	97062
2S135AC07000	FORCE ROBERT B & FORCE JEANETTE M	9365 SW PALOUSE LN	TUALATIN	OR	97062
2S135BD04600	FLETCHER CRAIG A & FLETCHER JENINE F	9840 SW LUMBEE LN	TUALATIN	OR	97062
2S135BC01000	FITZHENRY VIRGINIA LIV TRUST	7015 SW FOXFIELD CT	PORTLAND	OR	97225
2S135AC07100	FINDERS DEBRA P	9355 SW PALOUSE LN	TUALATIN	OR	97062
2S135BD07200	FILANTRES GUST J & FILANTRES CYNTHIA K	9630 SW IOWA DR	TUALATIN	OR	97062
2S135AD03500	FEUCHT DANIEL & BEVERLY LIV TRUST	22715 SW 87TH PL	TUALATIN	OR	97062
2S135BD02100	FANT BRIAN ALAN & DEBORAH SPARCK TRUST	22680 SW ENO PL	TUALATIN	OR	97062
2S135AD02400	FADLING JULIE H	22630 SW VERMILLION DR	TUALATIN	OR	97062
2S135AC12900	ESZLINGER ERIC & ESZLINGER NATASHA	9395 SW QUINAULT LN	TUALATIN	OR	97062
2S135AC13600	ERWERT EMILY	22915 SW 94TH TER	TUALATIN	OR	97062
2S135AD07600	ERDMAN PAUL & ERDMAN PAMALA B	8862 SW STONO DR	TUALATIN	OR	97062
2S135AC14300	ENNIS MARK & ENNIS BARBARA	9380 SW STONO DR	TUALATIN	OR	97062
2S135BD07100	ELLIS FAMILY REV TRUST	9640 SW IOWA DR	TUALATIN	OR	97062
2S135BD09600	ELLIOTT WESLEY & ELLIOTT TERRA	9521 SW IOWA DR	TUALATIN	OR	97062
2S135AD01200	EISENSTEIN ETHAN & EISENSTEIN MEGAN	22750 SW VERMILLION DR	TUALATIN	OR	97062
2S135AC09500	EGGERT BRENDA & EGGERT CHARLES	30000 SW 35TH DR	WILSONVILLE	OR	97070
2S135AC10400	EDWARDS DANIELLE	22585 SW 93RD TER	TUALATIN	OR	97062
2S135AC16200	EDELIN JENNIFER A & EDELIN SEAN M	9350 SW QUINAULT LN	TUALATIN	OR	97062
2S135BD06300	EBERHARD JEFFERY D & TAAFFE CAROL E	22975 SW ERIO PL	TUALATIN	OR	97062
2S135AC15600	EAKINS EILEEN G	22760 SW 93RD TERR	TUALATIN	OR	97062
2S135AC09800	DUNN PATRICK P & DUNN CLARA I RUSINQUE	9380 SW PALOUSE LN	TUALATIN	OR	97062
2S135BD00700	DUNN KARIN R	9500 SW IOWA DR	TUALATIN	OR	97062
2S135BD01600	DUFFY RONALD E TRUST	9795 SW IOWA DR	TUALATIN	OR	97062
2S135BC02000	DOWNES ADRIAN & DOWNES CATHERINE	22945 SW MIAMI PL	TUALATIN	OR	97062
2S135AC16100	DOW PETER J REV TRUST & SHERFY JENNIFER L REV TRUST	9360 SW QUINAULT LN	TUALATIN	OR	97062
2S135AC11000	DOSS ANDREA & DOSS BRANDON	22580 SW 94TH TER	TUALATIN	OR	97062
2S135AD14700	DITTMAN ADAM H & DITTMAN ELIZABETH A C	22785 SW 89TH PL	TUALATIN	OR	97062
2S135BD07000	DIETRICH ROBERT & DIETRICH SUSAN	9650 SW IOWA DR	TUALATIN	OR	97062
2S135BD06200	DICKMAN SCOTT D & CHEN WEIWEN	22955 SW ERIO PL	TUALATIN	OR	97062
2S135AD03700	DERIENZO NICHOLAS C & DERIENZO COURTNEY LEIGH	22755 SW 87TH PL	TUALATIN	OR	97062
2S135AC10500	DEARDORFF CRAIG S & DEARDORFF ALBERTA	22595 SW 93RD TER	TUALATIN	OR	97062
2S135AC01100	DAVIS JASON WAYNE	9180 SW STONO DR	TUALATIN	OR	97062
2S135AC13400	DARLING LANCE F	22865 SW 94TH TER	TUALATIN	OR	97062
2S135AD10400	CURTHOYS CAROL ANN REV LIV TRUST	8879 SW IOWA DR	TUALATIN	OR	97062
2S135AC08400	CRUZ ALEJANDRO FRANCISCO	9270 SW SKOKOMISH LN	TUALATIN	OR	97062
2S135AC07400	CRONKRITE ERIK	9315 SW PALOUSE LN	TUALATIN	OR	97062
2S135AC11800	CRISP TONI K	9380 SW IOWA DR	TUALATIN	OR	97062
2S135BD09700	CRAWFORD JASON S	9563 SW IOWA DR	TUALATIN	OR	97062
2S135AD12100	CRANSTON MICHAEL S	8845 SW STONO DR	TUALATIN	OR	97062
2S135BC01800	CORRY FAMILY TRUST	22905 SW MIAMI DR	TUALATIN	OR	97062

2S135AC11700	COOPER JULIE ANN LIV TRUST	9390 SW IOWA DR	TUALATIN	OR	97062
2S135AD02800	CONFER ANDREW B	22575 SW 87TH PL	TUALATIN	OR	97062
2S135BD06800	COMPTON MARC A & COMPTON JODY L	22151 SW ANTIOCH DOWNS CT	TUALATIN	OR	97062
2S135D000303	COMMUNITY PARTNERS FOR AFFORDABLE HOUSING	PO BOX 23206	TIGARD	OR	97281
2S135AC11600	COLUMBIA REDEVELOPMENT LLC	201 WOODCREST CT	FRANKLIN	TN	37067
2S135BD04900	COLE STEVEN W & ROBERTS ANDREA M	22850 SW ENO PL	TUALATIN	OR	97062
2S135AD14500	COBB DANIEL Z & COBB ROSA	22770 SW 89TH PL	TUALATIN	OR	97062
2S135AC07500	CLARK ROY H	9295 SW PALOUSE LN	TUALATIN	OR	97062
2S135D000101	CLARK KURT C & CLARK TARA	3539 DIANNA WAY	WENATCHEE	WA	98801
2S135AD06500	CHRISTENSEN STANFORD DEE & CAROL MAE REV INTERVIVC	8980 SW STONO DR	TUALATIN	OR	97062
2S135AD05000	CHILDS ROBERT M & CHILDS MARY J	22705 SW VERMILLION DR	TUALATIN	OR	97062
2S135BD04700	CHENG SIMON K	9860 SW LUMBEE LN	TUALATIN	OR	97062
2S135AD10100	CHASE HARRY M & CHASE CATHY LEE	8799 SW STONO DR	TUALATIN	OR	97062
2S135AC14800	CHAN JOSEPH L	23156 BLAND CIR	WEST LINN	OR	97068
2S135AD01000	CHAN CHEUK YEE CHAN REVOC LIV TRUST	22800 SE VERMILION DR	TUALATIN	OR	97062
2S135BD06700	CHAMSEDDINE WAEL M & CHAMSEDDINE BECKY A	22900 SW ERIO PL	TUALATIN	OR	97062
2S135AD11700	CHAMPAGNE PATRICK & ROY CELINE	8880 SW IOWA DR	TUALATIN	OR	97062
2S135AC05100	CHAMBERLAND MATHEW & CHAMBERLAND JAMES W	8975 SW IOWA DR	TUALATIN	OR	97062
3S102AB00100	CHAMBERLAIN JOHN & CHAMBERLAIN DEBRA	9000 SW GREENHILL LN	TUALATIN	OR	97062
2S135BD10000	CHAFF HEIDI L	22626 SW 96TH DR	TUALATIN	OR	97062
2S135AC12400	CARNS STEVEN C	9335 SW QUINAULT LN	TUALATIN	OR	97062
2S135AC16300	CARDENAS FERNANDO	9340 SW QUINAULT LN	TUALATIN	OR	97062
2S135AD11100	CARBAJAL PEDRO & CARBAJAL REGINA	8925 SW IOWA DR	TUALATIN	OR	97062
2S135AD06900	CALKINS MICHAEL & CALKINS DIANE	8890 SW STONO DR	TUALATIN	OR	97062
2S135AC02900	CALDERON CAMIE M	22735 SW 92ND PL	TUALATIN	OR	97062
2S135AC14700	CAIS CARLY J	9340 SW STONO DR	TUALATIN	OR	97062
2S135AC12500	BURNS DANIEL D & KRILL DEANN R	9345 SW QUINAULT LN	TUALATIN	OR	97062
2S135AD07700	BURCHFIEL LARRY & BURCHFIEL DEBORAH	8858 SW STONO DR	TUALATIN	OR	97062
2S135BD04300	BURCHETT KENNETH T & JOY A JOINT LIV TRUST	9700 SW IOWA DR	TUALATIN	OR	97062
2S135AC03700	BUNCE MICHAEL R REVOC LIV TRUST & BUNCE DEBORAH J R	9150 SW IOWA DR	TUALATIN	OR	97062
2S135BD03000	BUICH ALEXANDER & BUICH CORRINE	22985 SW MIAMI PL	TUALATIN	OR	97062
2S135AC14900	BUHAY JASON & BUHAY MICHELLE	9300 SW STONO DR	TUALATIN	OR	97062
2S135BD00500	BUCKALEW LIVING TRUST	22943 SW BOONES FERRY RD	TUALATIN	OR	97062
2S135BD11200	BROWN KATHERINE MARIE & BROWN CHRISTOPHER DAVID	22683 SW 96TH DR	TUALATIN	OR	97062
2S135BD10500	BROADHURST CURTIS	22543 SW 96TH DR	TUALATIN	OR	97062
2S135AC15000	BRECK KOLTE TRISTON & BEATTIE DANIELLE NICOLE	9290 SW STONO DR	TUALATIN	OR	97062
2S135AD00700	BRASHEAR GREGORY A	22935 SW MANDAN DR	TUALATIN	OR	97062
2S135AC10000	BOX MICHAEL L & BOX KATIE M	9370 SW PALOUSE LN	TUALATIN	OR	97062
2S135AC16500	BOSKET JOHN A & BOSKET JULIE L	9355 SW STONO DR	TUALATIN	OR	97062
2S135BD10600	BOHMAN FAMILY TRUST	22567 SW 96TH DR	TUALATIN	OR	97062
2S135AD03400	BOELL DONALD B & BOELL PATRICIA J	22675 SW 87TH	TUALATIN	OR	97062
2S135CA00400	BOCCI JAMES A & BOCCI JULIA A	23205 SW BOONES FERRY RD	TUALATIN	OR	97062

2S135AC01500	BLACK JENNIFER O & BLACK DAVID O JR	9040 SW STONO DR	TUALATIN	OR	97062
2S135AD01300	BENNETT JASON M & MCALEER MARGUERITE T	22730 SW VERMILLION DR	TUALATIN	OR	97062
2S135AC12100	BEMROSE HEATHER LYNN	9320 SW IOWA DR	TUALATIN	OR	97062
2S135AD01400	BELL JAMES M & BELL EVA J	22710 SW VERMILLION DR	TUALATIN	OR	97062
2S135AD11400	BELL REV TRUST	8930 SW IOWA DR	TUALATIN	OR	97062
2S135AD04000	BEIKMAN STEPHEN & BEIKMAN MONIQUE	22760 SW 87TH PL	TUALATIN	OR	97062
2S135AD12400	BEEBE BRENT E & BEEBE SANDRA L	8895 SW STONO DR	TUALATIN	OR	97062
2S135BD02600	BEDDES CRISTINA & BEDDES AARON	22765 SW ENO PL	TUALATIN	OR	97062
2S135AD07000	BECKSTEAD BRIAN A & BECKSTEAD ZERELDA G	8886 SW STONO DR	TUALATIN	OR	97062
2S135AC13000	BECKER SUSAN	9405 SW QUINAULT LN	TUALATIN	OR	97062
2S135AD01900	BEAR ALISA ANN TRUST	8525 SW MARICOPA DR	TUALATIN	OR	97062
2S135CA00500	BAZANT CHRISTINE LEE & BAZANT JOHN JOSEPH	36449 HWY 34	LEBANON	OR	97355
2S135AD00400	BAVARO EMILY EVELYN & BAVARO JOSHUA	22940 SW VERMILLION DR	TUALATIN	OR	97062
2S135BD09900	BATES-BLANCO FAMILY TRUST	22648 SW 96TH DR	TUALATIN	OR	97062
2S135AC15200	BANKS LANDON & BANKS MIRANDA	22850 SW 93RD TER	TUALATIN	OR	97062
2S135BC01900	BALLARD FAMILY TRUST	22925 SW MIAMI PL	TUALATIN	OR	97062
2S135AD09900	BACA GREGORY R & BACA ELIZABETH R	16869 SW 65TH AVE #387	LAKE OSWEGO	OR	97035
2S135AD05500	BABCOCK GAYLON	8680 SW STONO DR	TUALATIN	OR	97062
2S135D000400	AUTUMN SUNRISE LLC	8840 SW HOLLY LN	WILSONVILLE	OR	97070
2S135AC09400	AUSTIN MICHAEL P & AUSTIN ALLISON M	9325 SW IOWA DR	TUALATIN	OR	97062
2S135AD08000	AUST JOSEPHINE A	8846 SW STONO DR	TUALATIN	OR	97062
2S135AD11000	AUGEE JOEL L & AUGEE HEIDI M S	8905 SW IOWA DR	TUALATIN	OR	97062
2S135AC07800	ATKINS DANIEL J & ATKINS DAWNITA G	22570 SW 93RD TER	TUALATIN	OR	97062
2S135AC07700	ARCIGA MARCO A & ARCIGA VIRGINIA L	22550 SW 93RD TER	TUALATIN	OR	97062
2S135AC10900	ARCHULETA JOHN L & ARCHULETA ELISHA J	9385 SW SKOKOMISH LN	TUALATIN	OR	97062
2S135BD04000	APLIN ALAN WHITNEY & APLIN PATRICIA ANN	22940 SW ENO PL	TUALATIN	OR	97062
2S135AD09300	ANTHIMIADES GEORGE T & ANTHIMIADES STEPHANIE J	8735 SW STONO DR	TUALATIN	OR	97062
2S135AC03200	ANDERSON SCOTT A & ANDERSON ANDREA N	22825 SW 92ND PL	TUALATIN	OR	97062
2S135AC08100	ANDERSON RICHARD J JR	22630 SW 93RD TER	TUALATIN	OR	97062
2S135CD00100	ALVSTAD RANDALL & ALVSTAD KAREN	23515 SW BOONES FERRY RD	TUALATIN	OR	97062
2S135AC01600	ALLISON VICKI R	8994 SW STONO DR	TUALATIN	OR	97062
2S135AD10600	ALLARD JOHN A & ALLARD KELCIE L	8885 SW IOWA DR	TUALATIN	OR	97062
2S135AD03900	AGORIO DIANA	22790 SW 87TH PL	TUALATIN	OR	97062
2S135CD00300	AGHAZADEH-SANAEI MEHDI & ASIAEE NAHID	23745 SW BOONES FERRY RD	TUALATIN	OR	97062

MEETING NOTICE

at COMMUNITY ROOM - MARQUIS TUALATIN
19805 SW BOONES FERRY RD
7:00 pm WEDNESDAY APRIL 17, 2024

PROPOSED:

**REZONE TO "RML" w/ PLAN AMENDMENT,
SUBDIVISION & ARCHITECTURAL REVIEW**

2S-1-35D TAX LOTS 108 & 106 (Portion)

MORE INFO: KEN SANDBLAST 503-684-0652

MEETING NOTICE

at **COMMUNITY ROOM - MARQUIS TUALATIN**
19805 SW BOONES FERRY RD
7:00 pm WEDNESDAY APRIL 17, 2024

PROPOSED:
REZONE TO "RML" w/ PLAN AMENDMENT,
SUBDIVISION & ARCHITECTURAL REVIEW
2S-1-35D TAX LOTS 108 & 106 (Portion)

MORE INFO: KEN SANDBLAST 503-684-0652

NEIGHBORHOOD MEETING AFFIDAVIT OF POSTING NOTICE

Name of Applicant Ken Allen

Subject Property: Tax Lot(s) 106 (portion), 108 Tax Map(s) 2S135D

Address or General Location: 9300 SW Norwood Road, Tualatin, OR

I, Ken Allen, do swear or affirm that I am (represent) the party initiating interest in a proposed Rezone (INST to RML) w/ Comp Plan Plan Map Amendment; Residential Subdivision w/ Architectural Review affecting the land located at 9300 SW Norwood Road, Tualatin, OR and that pursuant to applicable Tualatin Development Code, did on the 2nd day of April 2024 personally post the notice indicating that the site may be proposed for a Rezone (INST to RML) w/ Comp Plan Map Amendment; Residential Subdivision w/ Architectural Review application.

The sign was posted at Frontage of site at 9300 SW Norwood Road, Tualatin, OR
(Location of sign on property)

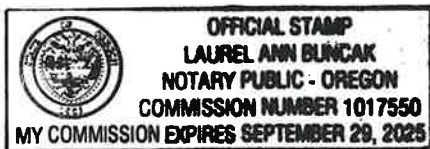
Map attached showing approximate sign notice location. (check if attached)

This 18 day of JUNE, 2024

[Signature]
Signature

Subscribed and sworn to, or affirmed, before me this 18 day of June, 2024.

STATE OF OREGON)
) ss
County of ~~Washington~~ Clackamas)



[Signature]
Notary Public for the State of Oregon
County of Clackamas

My Commission expires: September 29, 2025



NEIGHBORHOOD MEETING AFFIDAVIT OF MAILING

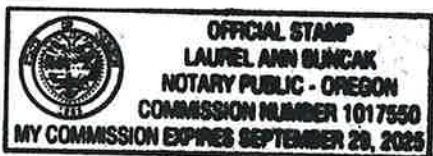
I, Ken Allen, being duly sworn, depose and say that on the 1st day of April, 2024 I caused to have mailed to each of the persons on the attached list a notice of a meeting to discuss a proposed development at 9300 SW Norwood Road, Tualatin, a copy of which notice so mailed is attached hereto and made a part hereof.

I further state that said notices were enclosed in envelopes plainly addressed to said persons and were deposited on the date indicated above in the United States Post Office with postage prepaid thereon.

Signature

Subscribed and sworn to, or affirmed, before me this 18 day of JUNE, 2024.

STATE OF OREGON)
County of ~~Washington~~ Clackamas) ss
fb



Notary Public for the State of Oregon
County of Clackamas

My Commission expires: September 29, 2025

APRIL 17TH, 2024
NEIGHBORHOOD DEVELOPER MEETING

THE NORWOOD PROJECT

WWW.NORWOODHOUSING.COM
KEN ALLEN, DEVELOPER





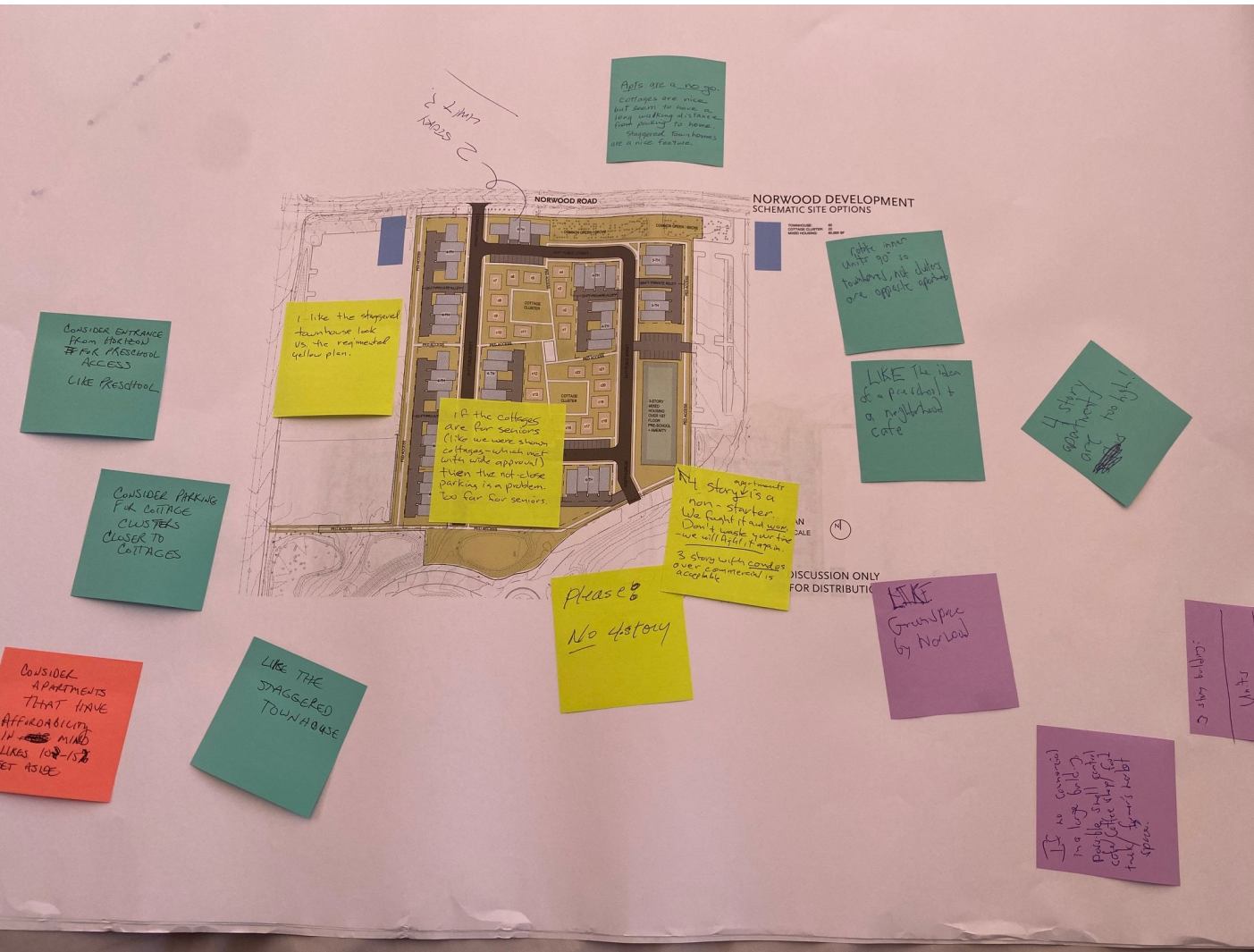
NORWOOD AGENDA TONIGHT

1. OVERALL VIEW OF VISION
2. REVIEW CONCEPT SITE PLANS
3. SAMPLE HOUSING TYPES
4. REVIEW OF APPLICATION
5. TREE SUSTAINABILITY PLAN
6. TRAFFIC IMPACTS & STUDY
7. OPEN PUBLIC QUESTIONS

WE LISTENED TO YOUR COMMENTS

NORWOOD AGENDA TONIGHT

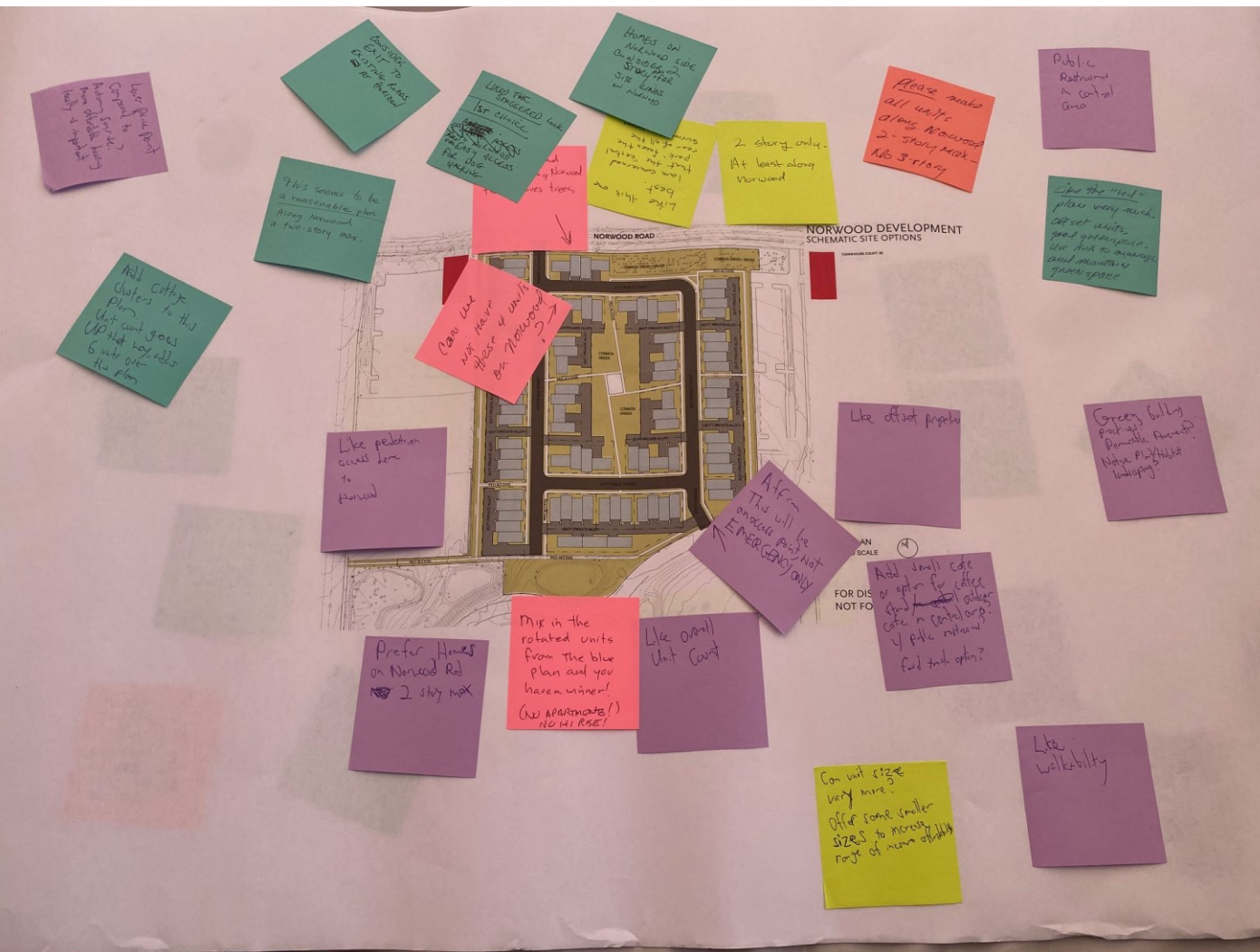
1. OVERALL VIEW OF VISION
2. REVIEW CONCEPT SITE PLANS
3. SAMPLE HOUSING TYPES
4. REVIEW OF APPLICATION
5. TREE SUSTAINABILITY PLAN
6. TRAFFIC IMPACTS & STUDY
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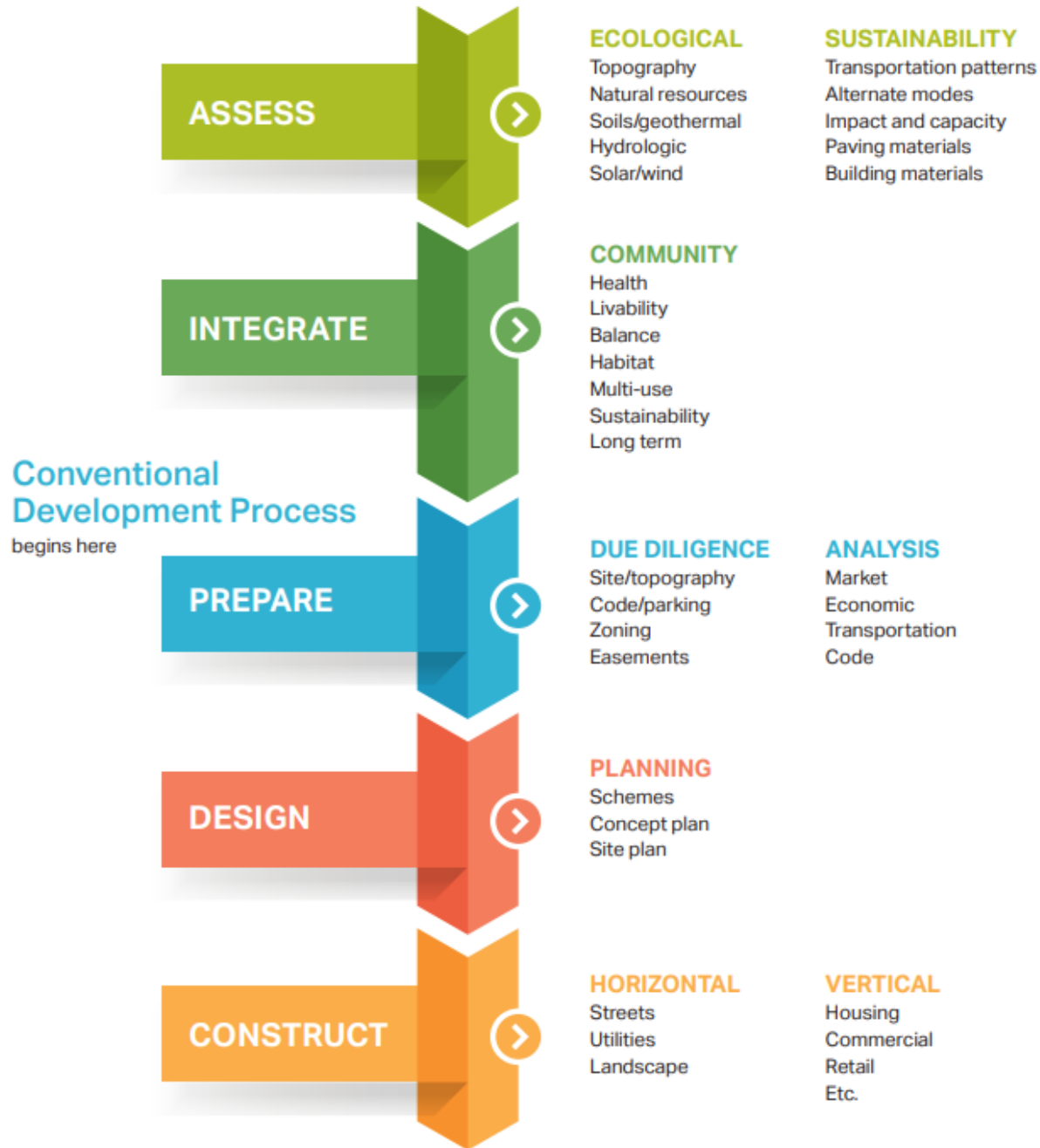
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Sustainable Development Process



NORWOOD AGENDA TONIGHT

1. OVERALL VIEW OF VISION
2. REVIEW CONCEPT SITE PLANS
3. SAMPLE HOUSING TYPES
4. REVIEW OF APPLICATION
5. TREE SUSTAINABILITY PLAN
6. TRAFFIC IMPACTS & STUDY
7. OPEN PUBLIC QUESTIONS

SUSTAINABLE PRINCIPLES



SUSTAINABLE PRINCIPLES

- Mix of land uses
- Housing Choices
- Walkability
- Open Space
- Transportation
- Integrate Eco Systems
- Watershed Health
- Reuse, Recycle, Regenerate
- Green Building
- Work Together



GABE HEADRICK TO REVIEW HOUSING PLANS

1. ATTAINABLE HOUSING OPTIONS
2. ATTACHED TOWNHOMES
3. DETACHED COTTAGE HOMES

NORWOOD DEVELOPMENT SCHEMATIC SITE OPTIONS

NORWOOD ROAD



type	Qty.	Lot Size W x D (ft)	Private Parking	
			Covered	Open
Townhouse - A	44	27 x 62.5	88	
Townhouse - B	2	22 x 62.5	4	
Townhouse - C	18	25 x 80	36	
Townhouse - D	12	25 x 63.6	24	
Cottage - A	12	47 x 78	24	
Cottage - B	2	48 x 60	2	
Cottage - general				24
Ttl. Townhouse	76		Private	Street
Ttl. Cottage	14		Parking	Parking
Total	90		202	56

LEGEND:

TOWNHOUSE		PEDESTRIAN PATHS	
COTTAGE		PUBLIC OPEN SPACE / LANDSCAPE	
PUBLIC STREET		PRIVATE OPEN SPACE / LANDSCAPE	
PRIVATE ALLEY			

NORWOOD ROAD

NORWOOD DEVELOPMENT SCHEMATIC SITE OPTIONS



type	Qty.	Lot Size	Private Parking	Street Parking
Townhouse - A	56	27 x 60	112	
Townhouse - B	10	22 x 60	20	
Townhouse - C	18	25 x 80	36	
Townhouse - D	17	25 x 57	34	
Total	101		202	55

LEGEND:

- TOWNHOUSE
- PEDESTRIAN PATHS
- COTTAGE
- PUBLIC OPEN SPACE / LANDSCAPE
- PUBLIC STREET
- PRIVATE OPEN SPACE / LANDSCAPE
- PRIVATE ALLEY





TOWNHOUSE C - STREET VIEW



COTTAGE CLUSTER VIEW

REQUEST FROM CITY

KEN SANDBLAST TO REVIEW
APPLICATION WITH CITY

- 1) DOWN ZONE TO RML
- 2) COMP PLAN AMENDMENT
- 3) SUBDIVISION AND ARCH REVIEW



Planning | Engineering | Surveying

Neighborhood / Developer Meeting

April 1, 2024

RE: 9300 SW Norwood Road Tualatin OR 97062

**Proposed: Rezone from Institutional to RML (Medium Low Density Residential) with
Comprehensive Plan Map Amendment and
Subdivision for Residential Housing with Architectural Review**

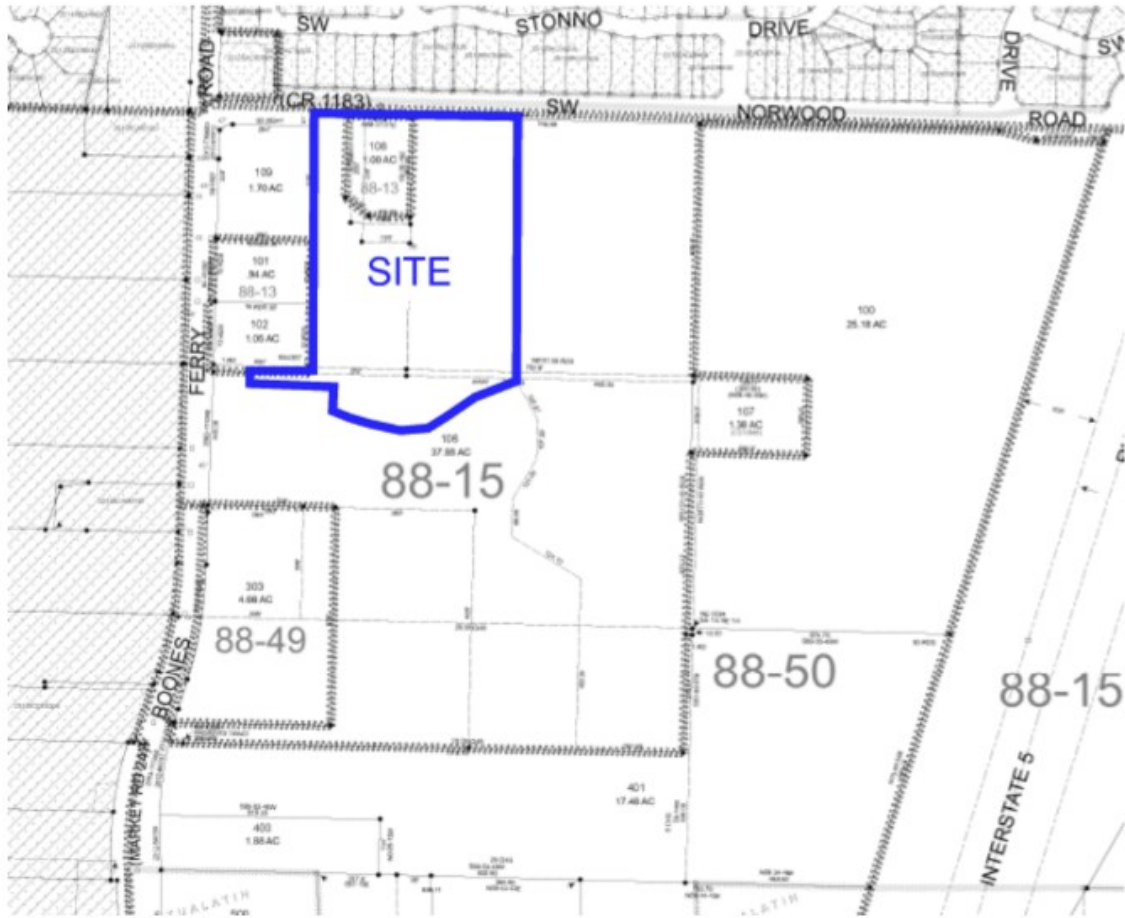
Dear Property Owner/Resident:

Westlake Consultants, Inc. is representing Norwood Horizon Holdings for the property located at 9300 SW Norwood Road, Tualatin, OR 97062. The site is approximately 9.3 acres in size and includes Tax Lot 108 (1 acre) and a portion of Tax Lot 106 (8.3 acres), both on Tax Map 2S135D – see maps provided on the reverse side of this letter – and visit our project website:

[We're Listening | SW Norwood Rd NORWOODHOUSING.COM](https://www.norwoodhousing.com)

As per the series of community meetings we have held since last August discussing this site, we will be applying for formal land use approvals (i) rezoning from Institutional to Medium Low Density Residential (RML), including a comprehensive plan map amendment, (ii) subdividing the site for residential homes, and (iii) architectural review of the proposed housing. Prior to applying to the City of Tualatin, we would like to take the opportunity to discuss the proposal in more detail with you.

SITE LOCATION MAP



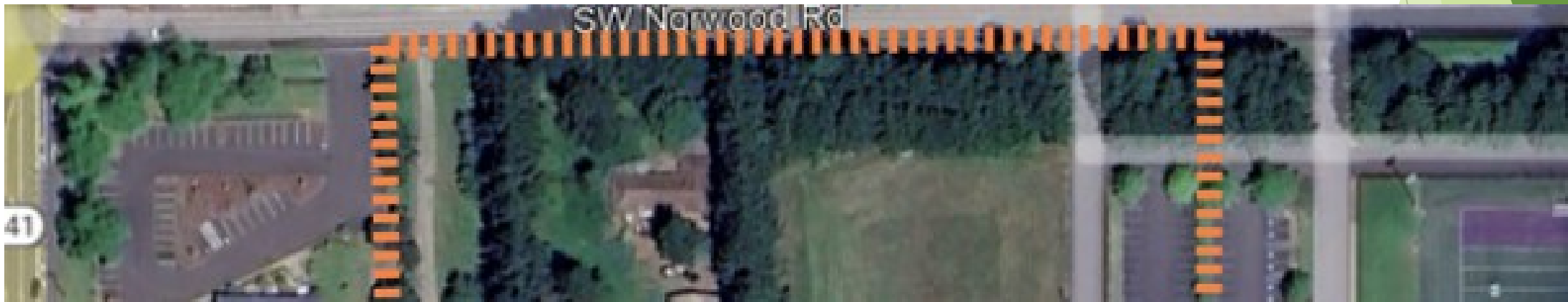
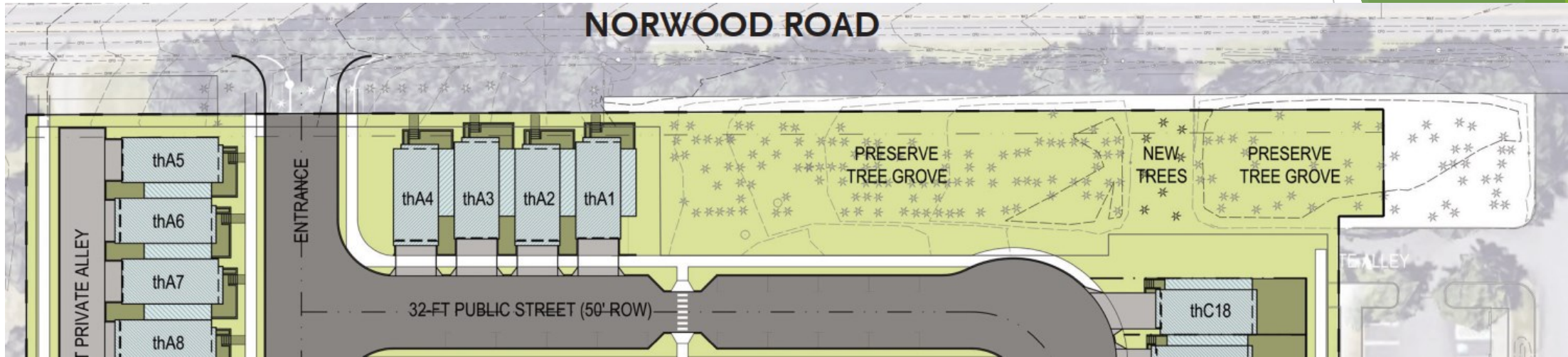
SITE ZONING MAP



A golden field of wheat with a winding path under a sunset sky. The text is overlaid in a bright green color.

TREE PRESERVATION PLAN

TODD PRAGER TO REVIEW TREE
PRESERVATION PLAN





TRAFFIC IMPACT PLANNING

JENNIFER DANZIGER TO REVIEW
TRAFFIC IMPACT PLAN

Transportation

▶ Impact Analysis (TIA) Overview

JENNIFER DANZIGER

April 17, 2024

Topics of Today's Presentation

- ▶ Why a Transportation Impact Study?
- ▶ Types of Studies
- ▶ Study requirements and assumptions
- ▶ Findings



Why do a Traffic Study?

- A traffic study may be required by the City of Tualatin when a land development project or zone change is proposed.
- The purpose of the study is to demonstrate that the transportation facilities in the vicinity of the proposed development can accommodate the new traffic added by the proposed development.



Types of Studies

- A *Trip Generation and Distribution Description* describes how much new traffic would be added by a proposed development and what routes it would use.
- A *Transportation Impact Analysis (TIA)* is a more detailed study that looks at how a proposed development would affect the safety and operations of the transportation network.
- A *Transportation Planning Rule (TPR) Analysis* examines the long-term impacts of a proposed zone change to ensure consistency between the land use and transportation elements of the City's Comprehensive Plan.

When is a Traffic Study Required?

- A *Trip Generation and Distribution Description* is generally required for projects that will add more than 100 new vehicle trips per day to the transportation network.
- A *Transportation Impact Analysis (TIA)* is generally required for projects that will add more than 500 new vehicle trips per day or 60 new vehicles trips during busiest hours of the day (typically morning and evening commute times) to the transportation network.
- A *Transportation Planning Rule (TPR) Analysis* is required for a proposed zone change that will potentially generate more trips than the existing zoning.



General TIA Requirements

- ▶ A study area defined by the affected agencies
 - All proposed site access points.
 - Intersections where more than 500 additional daily trips or 60 additional peak hour trips will be added by a proposed development.
 - Walking and cycling routes to nearby transit stops and schools.
- ▶ Traffic volumes - Morning and Evening Peak Hours
 - Existing condition
 - Trip generation for proposed development using industry standard trip rates
 - Forecast conditions without and with the proposed project for the opening year of the development

General TIA Requirements (continued)

- ▶ Safety
 - Review of historical crashes in a study area
 - Assessment of sight distance at accesses
 - Evaluation of possible safety improvements such as turn lanes or a traffic signal
- ▶ Intersection Operations
 - Delays and capacity utilization which are compared to mobility standards established by the roadway/intersection owner (typically Tualatin, Washington County, or ODOT)
 - Queues at intersections and driveways that could affect operations and safety



Data Collection

- ▶ Traffic Counts
 - Morning peak period - typically 7:00 to 9:00 AM
 - Evening peak period - typically 4:00 to 6:00 PM
 - Collected on a midweek day (Tues-Thurs) when school is in session
 - Busiest hour in each period is used for analysis
- ▶ Safety Data
 - Five years of reported crash data at each study intersection
 - Sight distance measurements at each proposed site access



General TPR Analysis Requirements

- ▶ Traffic volumes
 - Trip generation for existing zoning and proposed zoning based on a “reasonable worst-case” development scenario - this may not be what is proposed for the development
 - Forecast conditions for the existing and proposed zoning for a planning year of the development that corresponds with the forecast year for the City’s Transportation System Plan
- ▶ Intersection Operations



A wide-angle photograph of a vast, golden wheat field stretching towards a distant horizon. The sky is filled with soft, dramatic clouds, suggesting a sunset or sunrise. The overall color palette is warm and golden, with the wheat in the foreground and middle ground being the primary focus. The text is overlaid in the center of the image.

PUBLIC
QUESTION &
ANSWER
SESSION

THANK YOU

NEXT STEPS!
CITY PLANNING
COMMISSION REVIEW
May & June 2024



The Norwood Project - Neighborhood Meeting

7:00 pm Wednesday, April 17, 2024
 Community Room - Marquis Tualatin
 19805 SW Boones Ferry Rd. Tualatin, OR 97062

Sign-In Sheet

Name	Address	Phone	E-mail
JULIE HEIRONIMUS	22710 SW 90 th PL	503715-7562	JULIHE1R@AOL.COM
Julie Cooper	9390 SW IOWA DR-		juldujour@hotmail.com
Brenda Fortner			Brenda.hortner@nwnet.com
Danny O'Neal	22625 SW 94 th Terrace	503-512-2792	OTCME99@Comcast.net
Nick Parsons	23050 22625 SW Boones Ferry	The Bridged 971-235-2383	NickParsons55@gmail.com
Cheryl Neal	22415 SW 96 th Ave	503-449-5696	CHERYLNEAL@GMAIL.COM
Jim Neary	22780 SW 92 nd Pl	503-320-8220	JimNeary@gmail.com
Lois Simmons	22930 SW Miami P	1503-691-2311	lesimmon107@gmail.com
Holly Stuart	9235 SW Iowa Dr.	503-473-6889	hollyfarm05@gmail.com
Julie Welbach	22885 SW Vermillion Dr	503 8859633	randywe@juna.com
Rose Telet	22595 SW 87 th PL	503-475-5643	rose.telet@gmail.com
Holly Gray	71495 SW Norwood Rd	714-584-3596	
Heather Whas-Howe	J	714-293-3961	hwhasshowe@aol.com

Neighborhood Meeting Notes

The Norwood Project – 9300 SW Norwood Road, Tualatin

Meeting Date: Wednesday, April 17, 2024, 7:00 p.m.

Meeting Location: Community Room at Marquis Tualatin, 19805 SW Boones Ferry Rd

Project Proposal: Rezone of 8.3 acres from IN to RML to match existing 1 acre of RML land
95 units Residential Housing: Townhomes and Cottage Cluster
New public streets with 28 and 32 feet of paving; on-street parking
Private shared alley access easements
Tree preservation on Norwood Road frontage

Land Use Applications:

Rezone & Comprehensive Plan Amendment
Subdivision
Architectural Review

Project Team: Ken Allen, Norwood Horizon Holdings, LLC (Applicant)
Gabe Headrick, Steelhead Architecture (Design)
Ken Sandblast, Westlake Consultants, Inc. (Planning)
Todd Prager, Arborist (Tree Preservation)
Jennifer Danziger, Lancaster Mobley (Traffic)

Attendees: A list of attendees is attached.

Ken Allen, Norwood Horizon Holdings, LLC – Project Developer/Applicant

Ken began the meeting at 7:00 p.m. and reviewed the agenda and explained the meeting format and process for the Q & A period. A slide show presentation provided visual representation of the project site and proposed housing. In addition, schematic illustrations of the proposed housing types (elevations), floor plans and site plan were posted in the meeting room for attendees to view.

Ken provided an overview of the community outreach that has occurred for The Norwood Project to date. Over the past year, multiple community meetings have been held to present ideas and gather input from neighbors and property owners in the vicinity of the proposed project. The project includes a proposed mix of Townhomes and Cottage Cluster units on the 9.3-acre site.

As the developer, Ken explained that the approach to planning and development of the site involves key principles of sustainability, including taking into account the social, economic, and environmental factors throughout the process.

Gabe Headrick, Steelhead Architecture

Gabe provided an overview of the proposed housing types and neighborhood design:

- Housing options in a variety of sizes, types.
- Townhomes that are “alley-loaded” with the garage located at the back side of the unit to allow for street parking in front.
- Units with front-loaded garages and private backyard space.
- Front stoops that will encourage neighbors to engage with each other.
- Common green space.
- Walkable neighborhood design—less car-centric.
- Cottage Cluster units ranging from 900 to 1,800 square feet, most with garages.
- Parking will accommodate needs on site—Townhomes will each have 2 spaces, Cottages will have 1 or 2. On-street parallel parking on streets and in some alleyways.
- The designs and elevations are preliminary but do provide an example of the massing on the site.

Ken Sandblast, AICP -- Westlake Consultants, Inc.

Ken gave an overview of the Land Use applications that will be required for approval of the proposed project:

- Zone Change from Institutional (IN) to Residential Medium Low Density (RML) and Comprehensive Plan Map Amendment— The project site consists of 1 acre of land zoned RML and 8.3 acres currently zoned IN. The proposal includes rezoning the 8.3 acres to allow for housing development. This proposed zone change would reduce the intensity of the zoning on the 8.3-acre portion.
- The Comprehensive Plan Map Amendment is needed to ensure consistency with the City’s overall land use plan.
- Subdivision—To create lots that meet the City’s zoning requirements.
- Architectural Review—As this proposal includes some innovative design features, it may not meet the City’s Clear and Objective standards. As a result, the project will likely require review by the Architectural Review Board.

Todd Prager, Consulting Arborist -- Todd Prager & Associates, LLC

- Main focus is on preserving trees along Norwood Road frontage. In particular, it is important to avoid disturbance of the edges of the tree grove, as it has become a cohesive grouping of trees.
- Locating site access at the western end of the site’s Norwood frontage will avoid disturbing the tree grove.



- The plan includes removal of the existing driveway into the site and planting new trees in that area.
- Norwood Road improvements could be an issue. As a result, Todd's recommendation is to move the sidewalk as far north as possible and place any public utilities under the sidewalk, rather than in an easement behind the sidewalk.

Jennifer Danziger, Sr. Transportation Engineer – Lancaster Mobley

- A traffic study will be required by the City of Tualatin to demonstrate that transportation facilities in the vicinity of the proposed development can accommodate new traffic generated by the development in terms of volume and safety.
- The study will also look at thresholds for a turning lane and signal at Boones Ferry and Norwood, and will analyze the queuing impacts of these possible mitigation improvements.
- Data will be collected during the a.m. and p.m. peak hours on days that best represent the typical pattern of traffic for the area.
- Both the City of Tualatin and Washington County will be involved in the traffic analysis, as the roads are County roads.
- The traffic analysis will also take into account other planned projects that will be coming online in the future.
- A Transportation Planning Rule (TPR) Analysis will be required due to the proposed Zone Change and Comprehensive Plan Map Amendment. This analysis will examine long-term impacts of the proposed changes.

Issues/Questions and Responses

Q: (Julie Heironimus) Will you be taking into account the existing traffic heading to Wilsonville on Norwood? Will you use “tube” car counters?

A: (JD) We will do visual turning movement counts and they will capture cut-through traffic, as well as type of vehicle and pedestrians. (Tubes can't count those things.)

(KA) We would like to have a signal at that location; Autumn Sunrise is also supportive of a signal at that location.

Q: (Tim Neary) It is important to neighbors to have a second access point through Horizon. Will there be one?

(KA) We will be considering that and discussing it with Horizon School, however, in the event Horizon gives permission to allow access, there are issues of public traffic moving through private property. Typically, public traffic needs to stay on public streets.



(JD) A new signal at Boones Ferry / Norwood would take pressure off of the access point, reducing the need for a second access.

Q: (Dan O’Neal) Does the traffic survey pay attention to type of vehicle?

(JD) Yes, we will track the vehicle classes; the data will be available in the report.

(KA) Autumn Sunrise is putting a signal at Boones Ferry, south of Plambeck Terrace.

Q: (Nick Parsons/Bridge Church) Will the sewer be coming up in Norwood for this project?

(KS) The sewer line will come from the south.

(KA) This information will be looked at and made available on the website.

Q: (Cheryl Veall) I live on Norwood. People go to 65th to exit. Will traffic counts take those cars into consideration?

(JD) The City may ask for that to be done. The study will look at that route; if the thresholds are met, we will include it in the study.

(KA) The traffic study scoping letter will define that. If this proposed project is causing problems, changes may be made.

Q: (Holly Stuart) Would it be appropriate to put the utilities where the driveway will be removed?

(TP) We would prefer to avoid any disturbance there as that could impact the existing trees.

(KS) The utilities serving the lots will be brought into the site where the new road is to be located.

Q: Will the Sequoia trees be removed?

(KA) There will be some tree removal for the new road entrance into the site. Effort will be made to preserve as many trees as possible.

Q: (Heather H.) When will the road improvements be done? I live at the NE corner of Norwood and Boones Ferry Rd.

(JD) If a signal goes in, there will be widening of the road. If the signal is not required, the road would remain one traffic lane in each direction.

(KS) Construction of site and road improvements could begin possibly next summer (2025); The project has 10-12 months of planning and engineering to be completed prior to any construction.

Q: (Heather H.) Are road improvements done first, or are the homes built?

(KA) Once the land use decision is issued, it will have a set of Conditions of Approval that must be satisfied. Roadway improvements will be included as a condition of approval.



Both onsite and offsite improvements will be done concurrently. Construction of homes would not begin until road improvements are completed..

Q: (Holly S.) Is the driveway on Norwood too close to Bridge Church?

(JD) Norwood is classified as a Collector and has driveway spacing requirements of 100-150 feet. If that requirement cannot be met, it's possible we could request an exception to the spacing in order to preserve the trees.

Q: We should have a park there.

(KA) We are balancing green space with the economics of the project. It is our understanding that there is a park planned just across Boones Ferry that will serve the vicinity.

(GH) The proposed common green space will be available for all residents. The project includes a generous amount of green space in comparison to typical housing developments.

Q: Is it possible to change the speed on Norwood? Having two different speeds causes issues.

(JD) As Norwood is a County road, they have the jurisdiction and would make that decision.

Q: (Holly Gray) Will all of the kids go to Tualatin High School? Will there be a flashing light crossing put in?

The proposed project is located within the Sherwood School District, so residents will attend schools in that district.

(JD) A previous study looked at a possible midblock crossing. The City might look at that, but it would not be part of this project.

Q: (Cheryl V.) Regarding parking, the Villebois development has a similar layout, and when cars park on both sides of the street, only one vehicle lane is passable. Will that be the case here?

(KS) The project includes streets with 32-foot-wide paving, which allows parking on both sides of the street and keeps both travel lanes passable.

(JD) The travel lanes would be 10 feet wide each, and there would be 6 feet for parking along each side of the road.

Q: (Nick/Bridge Church) We have had some discussion about the roadway near the exit. Can the new road (entrance) be moved to the center of the site?

(KA) It is preferable to keep the new access/ street entrance away from the tree grove.

(JD) The traffic study will look at queuing to determine if there are issues.



Q: (Cheryl V.) If the plan for cottages doesn't work, when will we find out?

(KS) At this time, the plan is to move forward with the cottage cluster concept. The application package will include the details of the proposal and be available at the time of submittal to the City.

Q: (Holly S.) Who will be reviewing the proposal? Are they informed?

(KA) All departments of the City of Tualatin will review the application package. In addition, Washington County will review the transportation aspects of the proposal.

Q: (Julie H.) The four townhouse units on Norwood—are they still part of the plan? Will traffic block them in? The appearance along Norwood isn't as nice (with the homes instead of the trees).

(KS) There is a required setback that will keep the townhomes away from the road. If the trees can be preserved along Norwood, the homes will be behind them and not as visible from the road. Those townhomes will have driveways onto the new on-site street—they will not enter Norwood directly.

(JD) Sight distance for the new road intersection with Norwood will be evaluated.

Q: It looks like a lot of trees are being removed.

(KA) The tree inventory has not been done yet and the specific trees needing to be removed have not been identified. We will attempt to save as many trees as possible.

The meeting concluded at approximately 8:45 p.m.





NORWOOD PROJECT

9300 SW Norwood Road

Pre-Application Meeting Summary – February 28, 2024

Thank you for discussing your proposed project. Below you will find a summary of our discussion points. If there is anything else from our meeting that you wish to document, please respond with your notes as well. Thank you.

Please Note: TDC 32.110. [...] The pre-application conference is intended to be a tool to assist applicants in navigating the land use process, but is not intended to be an exhaustive review that identifies or resolves all potential issues, and does not bind or preclude the City from enforcing any applicable regulations or from applying regulations in a manner differently than may have been indicated at the time of the pre-application conference.

Required Land Use Reviews

Submit all application materials electronically via eTrakit: <https://permits.ci.tualatin.or.us/eTrakit/>.

Neighborhood/Developer Meeting

Holding a Neighborhood/Developer meeting is required for Plan Map Amendment (Zone Change) and Type II Subdivision applications.

Neighborhood/Developer meetings should generally be held no more than six months prior to application. This meeting is to be held in-person within the City of Tualatin boundaries. More detailed information about this meeting, is online here: <https://www.tualatinoregon.gov/planning/neighborhooddeveloper-meeting-information-packet>

Applicants are responsible for mailing and posting notice of the Neighborhood Developer meeting. The City can provide a list of addresses for your notice letters for a \$35 fee. Address list requests can be made by emailing: planning@tualatin.gov.

Be sure to email the meeting invite to planning@tualatin.gov.

Plan Map Amendment (Zone Change):

Applicant-initiated Plan Map Amendment is a Type [IV-A](#) Lane Use process – See Tualatin Development Code Chapter [32.240](#)

- Decided by City Council
 - An advisory recommendation is sought with the Tualatin Planning Commission prior to a City Council hearing. The applicant team is invited to attend and share information at this meeting, as are members of the public, but it is not a formal hearing.
- Completeness Review: 30 Days
- Within 45-days of determining an application is complete, a public hearing date will be set before the City Council. Council meetings are held on the 2nd and 4th Monday of each month, beginning at 7:00 PM.

- Application packet: <https://www.tualatinoregon.gov/planning/plan-map-amendment-pmaplan-text-amendment-pta-instructions>
 - Plan Map Amendment fees can be found in the [Fee Schedule](#)
- An example of a recent Plan Map Amendment application can be found on the Projects Page here: <https://www.tualatinoregon.gov/planning/pma-21-0001-tualatin-heights-apartments>
 - For Council recording and packets: <https://www.tualatinoregon.gov/citycouncil/city-council-meeting-358>

Plan Map Amendments require extensive narrative findings to the approval criteria listed in [TDC 33.070\(5\)](#) with supporting evidence including:

- Prove adequate capacity and improvements are identified within master plans for public sanitary sewer, stormwater, water, and transportation systems. If greater capacity or alternate improvements are required, identify those needs.
- A Transportation Planning Rule (TPR) analysis in support of the proposed upzone in residential density.
- Please work with us in advance of application submittal regarding this site to coordinate a plan that can be successful. This is especially needed for modifications compared to master plans of other special requests for consideration.
- A development agreement may be a consideration
- Further comments regarding the available systems are under Public Utilities below.
- Service provider letter from the Sherwood School District.
- Response to Oregon Statewide Planning Goals, Oregon Administrative Rules, Metro Chapter 3.07 - Urban Growth Management Functional Plan
- Response to applicable Tualatin Development Code criteria;
 - [Chapter 32](#): Procedures
 - [Chapter 33.070](#): Plan Amendments
 - [Chapter 41](#): Medium Low Density Residential Zone (RML)
 - [Chapter 49](#): Institutional Zone (IN)
- Response to applicable goals and policies (including housing development goals) found in the current [Housing Needs Analysis](#) and [Tualatin Comprehensive Plan](#) including Chapter 3 and 10 which states:
 - POLICY 1.1.3. Conduct the planning process with adequate input and feedback from citizens in each affected neighborhood
 - POLICY 3.1.1 DENSITY. Maintain a citywide residential density of at least eight (8) dwelling units per net acre.
 - Policy 3.2.1 Housing Type Diversity - Support development of townhomes, duplexes, triplexes, quadplexes, cottages, courtyard housing, accessory dwelling units, single story units, senior housing, and extended family and multi-generational housing in all residential zoning districts.
 - GOAL 3.5 HOUSING AND TRANSPORTATION. Encourage development and redevelopment in Tualatin that supports all modes of transportation, including walking, biking and mass transit.
 - POLICY 3.7.1 ENVIRONMENTAL PROTECTION. Housing and residential growth policies will be evaluated for consistency with the environmental protection goals and policies of Chapter 7 (Parks, Open Space, and the Environment).
 - *Medium-Low Density Residential Planning District (RML): This district supports household living uses with a variety of housing types at moderately low densities. This district is primarily oriented toward middle housing types including attached dwellings, multi-family development, and manufactured dwelling parks.*
 - *Institutional Planning District (IN): The purpose of this district is to provide an environment exclusively for, and conducive to, the development and operation of religious institutions,*

schools, public parks, and related uses, in a manner that is harmonious with adjacent and nearby residential, commercial, or manufacturing planning districts and uses.

- *The district is intended to accommodate large-scale campus style developments, owned and operated by governmental or nonprofit entities, consisting of multiple structures or facilities, which may serve multiple purposes and provide multiple services to the community.*

Subdivision

Type II Land Use Decision – See Tualatin Development Code Chapter [32.220](#)

- Decided by City Staff
- Completeness Review: 30 Days
- Staff issues Notice of Application after application is deemed complete:
 - 14-Day Comment Period
 - Those who comment gain standing for potential appeal
- Decision shared with applicant and property owner within 60 days of a complete application
 - Appeal Period: 14 Days
- Application Packet: <https://www.tualatinoregon.gov/planning/partition-par-subdivision-sb-and-property-line-adjustment-pla-instructions>
 - Subdivision fees can be found in the [Fee Schedule](#)
- Examples of Subdivision applications are found on the Projects Page: https://www.tualatinoregon.gov/projects?term_node_tid_depth=All&field_project_status_value=All&field_project_type_tid=110&keys=

Criteria to address in the narrative submittal include:

Tualatin Development Code

[TDC 32: Procedures](#)

[TDC 33.110: Tree Removal](#)

[TDC 36: Subdividing, Partitions, and Property Line Adjustments](#)

[TDC 42: Medium Low Density Residential Zone \(RML\)](#)

[TDC 73A: Site Design](#), [73B: Landscaping Standards](#), [73C: Parking Standards](#), and [73D: Waste and Recyclables Management Standards](#)

[TDC 74: Public Improvement Requirements](#)

[TDC 75: Access Management](#)

Required Service Provider Letters

Clean Water Services will comment on additional natural resources, through their Review process. The Service Provider Letter from CWS is a requirement of a complete land use or Engineering permit submittal. For more information, see <https://dynamic.cleanwaterservices.org/Forms/PreScreen>. This letter will specify any required wetland and buffer mitigation.

Coordination with Tualatin Valley Fire & Rescue, the City's emergency and fire protection services, is required as part of a complete land use process. To obtain a service provider letter for proposed development, please work directly with TVF&R: <https://www.tvfr.com/FormCenter/Public-Records-7/Service-provider-permit-for-Tualatin-73>

Coordination with Republic Services, the City's waste disposal service, is required as part of the Architectural Review process. To obtain a service provider letter for proposed development, please work directly with Kelly Herrod, Operations Supervisor; kherrod@republicservices.com (503) 404-4181.

Tree Removal

- Tree removal, if proposed, is reviewed under the SB application.
- A tree preservation plan and a tree assessment report prepared by a certified arborist are required to address the approval criteria for tree removal found in [TDC 33.110\(5\)](#).
- Trees have been a major concern raised by community members and decision-makers. While our code is broadly permissive on the issue of tree removal, documenting compliance with section is likely to be especially important.

Highlighted Design Standards

- Basalt Creek Parks & Recreation Plan identifies a 12' bike & pedestrian pathway off street in ROW along Norwood Road.
- Single Family Dwelling, Duplexes, Townhouses, Triplexes, Quadplexes, and Cottage Clusters following Clear and Objective Standards are subject to a [Type I](#) Architectural Review.
 - Architectural Review Single Family (ARSF) Application:
<https://www.tualatinoregon.gov/planning/architectural-review-single-family-residential-arSF-application-information-packet>
 - The ARSF Type I review and associated fees are required for each building.
- [TDC Chapter 41](#) – Medium Low Density Residential Zone (RML)
 - [TDC 41.220 - Housing Types](#)
 - *Townhouse* A dwelling unit constructed in a row of two or more attached units, where each dwelling unit is located on an individual lot or parcel and shares at least one common wall with an adjacent unit.
 - *Cottage Cluster*. A grouping of no fewer than four cottages per acre that includes a common courtyard, subject to the provisions of [Chapter 73A](#).
 - [TDC 41.300 - Development Standards](#)
 - Densities, lot sizes, setbacks, structure heights, lot coverages, etc.
- [TDC Chapter 73A](#) – Site Design Standards
 - [TDC 73A.110](#) - Clear and Objective Residential ([Type I](#)) Design Standards
 - [TDC 73A.150](#) - Clear and Objective ([Type I](#)) Cottage Cluster Design Standards
- [TDC Chapter 73B](#) – Landscaping Standards
 - [TDC 73B.080](#) - Minimum Landscaping Standards for All Zones
 - [TDC 73B.090](#) - Minimum Standards Trees and Plants
- [TDC Chapter 73C](#) – Parking Standards
 - Attached is Tualatin's temporary guidance on Climate-Friendly and Equitable Communities parking mandates.
 - [TDC 73C.130](#) - Parking Lot and Driveway and Walkway Minimum Requirements
- [TDC Chapter 73D](#) – Waste and Recyclables Management Standards
- [TDC Chapter 73G](#) – Masonry Wall Standards
 - Masonry wall standards are broadly applicable, as described in TDC 73G.020 where a subdivision or partition has access-restricted lot lines abutting arterials, collectors, and highways in the RL or RML zones.
 - Alternative masonry wall design proposals may be reviewed through the Architectural Review process in [TDC Chapter 33](#). Approval or denial is based upon the criteria set forth in [TDC 33.020\(5\)](#).

Public Utilities and Other Site Development

Plan Map Amendment

Submit:

- Supporting calculations and documents proving adequate capacity of existing public sewer, stormwater, water, and transportation systems including improvements identified within master plans or identify necessary improvements greater than current master plans.
- A Transportation Planning Rule (TPR) analysis in support of a proposed upzone of residential density.

Land Use For Any Division and Architectural Review Application Submittal Requirements:

Below is a summary of potential public facility requirements. Staff encourages applicants to coordinate with Engineering staff *before* submitting an Architectural Review application. Supply draft supporting materials with associated proposed plans to obtain staff feedback to further learn likely requirements and refine your submittals.

- Public Improvement Plans identifying existing and proposed public improvements required by TDC [74](#) and [75](#) with narrative demonstrating compliance with applicable sections.
- A traffic study per [TDC 74.440](#) is required to be provided by the applicant and furnished to the City as part of the development approval process in conformance with the City's traffic study guidelines: <https://www.tualatinoregon.gov/engineering/tualatin-traffic-study-requirements>.
 - Coordination and scoping with the City Engineer is required before submittal of the application. Mike McCarthy, City Engineer mmccarthy@tualatin.gov (please copy tdoran@tualatin.gov) or call (503) 691-3674.
 - City staff will coordinate with applicable agency/jurisdictions such as Washington County and ODOT
 - ODOT is likely to require proportional fee for an identified project at the SW Boones Ferry Road and I-5 interchange.
 - Show access easements between this development for adjacent lots to the west (east of SW Boones Ferry Road, south of SW Norwood Road).
- Hydraulic Modeling is required for over 48,300 square footage of new building area, 870 gallons/acre/day use, and/or more than 49 residential units. Hydraulic Modeling must verify adequate capacity of the existing public system as the current water master plan identifies potential deficiencies or it will indicate improvements required with the development. Requests are welcomed before submittal of the land use application to assist your understanding of requirements. Additional modeling after land use may be required. Request Hydraulic Modeling via eTrakit <https://permits.ci.tualatin.or.us/eTrakit/>. When submitting a modeling application include:
 - Requirements/alternatives allowed by TVF&R. Apply for a TVF&R service provider letter via <https://www.tvfr.com/FormCenter/Public-Records-7/Service-provider-permit-forTualatin-73>.
 - Hydrant flow test results. Request testing using this link: <https://www.tualatinoregon.gov/publicworks/hydrant-flow-tests>. For questions contact Terrance Leahy, Water Division Manager, (503) 691-3095; [tleahy@tualatin.gov](mailto:t Leahy@tualatin.gov).
 - After submittal Staff will coordinate with you regarding any further fee payment per the current [fee schedule](#).

Required Public Street Improvements:

- Per TDC [74.210](#), [74.420](#), [74.425](#), [74.430](#), public street dedication and improvements must meet the *preferred* street cross-sections. Exceptions to these standards may be granted by the City Engineer. To be granted an exception the alternate dedication and improvement must provide equivalent safety, mobility, and connectivity to the *preferred* standard and be justified due to existing development,

topographical, or other constraints. Staff recommends discussing a request for exemption before submittal of the application.

- Evaluate adjacent existing public sidewalks, driveways, and any ramps to assure conformance with ADA/PROWAG specifications and/or include with your proposal of improvement of any out of compliance locations.
- Dedication and up to full depth construction of public streets adequate to serve the development and provide connectivity.
 - Internal streets must match [Tualatin's Local Street cross-section](#). Requested modifications under TDC [74.430](#) must be approved by the City Engineer.
 - SW Norwood Road is a Major Collector under Washington County jurisdiction:
 - Minimum ROW dedication of 45 feet from centerline (37 + 1 for Tualatin planter + 7 for the multi-use path).
 - The C-1 County standard includes a 5-foot-wide planter strip with a 5-foot-wide sidewalk.
 - The additional width enables the Tualatin requirements of a 6-foot-wide planter strip and 12-foot-wide multi-use path matching
 - Tualatin's Major Collector cross-section
 - Basalt Creek Parks & Recreation Plan.
 - <https://www.co.washington.or.us/LUT/Divisions/Engineering/ConsultantResources/upload/Modded-Ordinance-738-with-Exhibits.pdf>
- Any additional dedication and improvements as a result of an approved traffic study. This may include, but is not limited to:
 - Public access easements for the lots west of this site to cross through the development due access restrictions and traffic issues along SW Boones Ferry Road or as otherwise approved by Washington County and the City Engineer
 - A signal at SW Boones Ferry Road and SW Norwood Road may be required and TDT creditable
 - Turn lanes at intersections
 - Site access potentially relocated to the east
 - Potential sidewalk connections on south side of SW Norwood Road:
 - West to SW Boones Ferry Road
 - East to Autumn Sunrise subdivision
 - Crosswalk treatments (which may include an RRFB) with connecting ramps to the north side of SW Norwood Road
- Washington County TDT credits may be available per the [TDT manual](#) for excess capacity beyond requirements due to the project with greater dedication and constructed width and depth than a [Tualatin Local Street](#). The [Amended Project List](#) includes Project Number 6030 for street widening on SW Norwood Road.
- Underground existing overhead utilities unless power lines are over 50kv (then associated existing utilities may be able to remain above).
 - Work directly with PGE regarding any existing lines and poles vs what they will require to serve your site.
 - Your conversations with PGE may result in their request of special circumstances. Please provide us PGE's response early so we can provide timely feedback.
- 8-foot-wide public utility easements adjacent to rights-of-way.
 - These may be enlarged to surround fire vaults or support franchises such as PGE.
 - Retaining walls must be located outside of PUEs.
 - SW Norwood Road must maintain slopes within the PUE per Washington County code.

Required Sanitary Sewer Improvements:

- Public sanitary sewer mains must be constructed within public streets, adjacent to the lot, and extended adequately to serve future development. A public easement for a line and access may be allowed through the development to improve likelihood of future development obtaining gravity service.
- Propose a local plan to show how this vicinity may be served by the public system.
 - Public sanitary sewer lines exist in SW Boones Ferry Road north of SW Norwood Road and within SW Norwood Road to the east of this site.
 - Gravity flow is required.
 - Propose construction of public lines in accordance with [TDC 74.620 \(2\)](#).
 - Prove the extension of the public sanitary system has adequate depth and slope to serve all adjacent unserved upstream lots and areas.
- Evaluate downstream sanitary sewer capacity including master plan capital projects to determine if thresholds of public pipe upsizing are met by your development:
 - [Master plan](#)
 - Required upsizing would include staff coordination with Clean Water Services. Discussions would include availability of any SDC credits.

Required Stormwater Improvements:

- One public stormwater facility is preferred to serve all the improved and modified public streets required of this development.
 - The public facility should address any subdivided residential lots, however private facilities should address private development such as apartment complexes or condominiums.
 - Tualatin allows LIDA street swales within planter strips; however, this would require approval with Washington County for SW Boones Ferry Road and SW Norwood Road.
- Coordinate with Engineering staff as how to best serve the drainage basin. The preferred goal is one or few regional public facilities which may be within deeded tracts, right-of-way, or easements.
 - Propose construction of public lines in accordance with [TDC 74.630 \(3\)](#).
 - TDC [74.320](#), [74.330](#), and [74.350](#), applicable easements and tracts will be required.
 - Storm drainage lines must be installed to serve each property in accordance with City standards.
 - The storm drainage calculations must confirm that adequate capacity exists to serve the site and upstream flows of the basin. Provide a local system plan enabling gravity flow for the vicinity.
 - Stormwater plans and calculations stamped by an Oregon registered, professional engineer in accordance with [TMC 3-5-390\(1\)](#) proving proposed systems:
 - Address runoff from all new and modified private impervious areas.
 - Show each non-residential or apartment complex lot addresses their own stormwater runoff within private onsite facilities on their respective lot prior to direct connection to the public stormwater system for proposed new and modified impervious areas.
 - Treat new and modified impervious areas in accordance with [CWS D&CS 4.08.1.d](#) meeting phosphorous removal in accordance with [TMC 3-5-350](#) per the design storm in accordance with [TMC 3-5-360](#) and [CWS D&CS 4.08.2](#).
 - Detain in accordance with [TMC 3-5-220](#), [TMC 3-5-230](#), and [CWS D&CS 4.08](#).
 - Accommodate hydromodification in accordance with [CWS D&CS 4.03.5](#).
- Conveyance calculations must show capacity up to a 25-year storm event with 100-year overland flow to the Tualatin public stormwater system in accordance with [TDC 74.640](#) and [CWS D&CS 5.05.2.d](#).
 - Downstream evaluation ¼ mile [TMC 3-5-210 – Review of Downstream System](#) including focus on potential erosion concerns and solutions.
 - A maximum of 82% capacity within public lines.

- If a proposed water quality facility includes infiltration in the design, a Geotech/soil/infiltration report proving infiltration rates must be submitted for a complete land use application in accordance with [CWS D&CS 4.08.3](#).
- Demonstrate compliance with the [Clean Water Services' Service Provider Letter](#) conditions sufficient to obtain a Stormwater Connection Permit Authorization Letter in accordance with [TDC 74.650\(2\)](#) and [CWS D&CS 3.01.2\(d\)](#).

Required Water Improvements:

- Public water mains exist within SW Boones Ferry Road and SW Norwood Road
- Construct mains as determined via the hydraulic modeling request within public streets
- [Master plan](#)

Post-Land Use Permit Requirements

The below listed Engineering division permits will be required after land use approval. Engineering and associated agency permits (e.g. Clean Water Services) must be issued prior to a land division plat release to the County's queue and any Building division's permit issuance.

Apply for a Washington County facility permit and include a copy of plans within the Tualatin permit set: <https://www.co.washington.or.us/LUT/Divisions/Operations/Permits/rowpermits.cfm>

Apply for Tualatin Engineering Division permits using eTrakit: <https://permits.ci.tualatin.or.us/eTrakit/>.

The initial Engineering permit(s) application(s) must include:

- Use NAVD 1988
- One combined 22" x 34" plan set of all applicable Engineering permits attached to one Engineering permit. Include a note with other associated Engineering permits indicating which application includes the set.
- Two 22" x 34" hard copies must be delivered
- Pay fees per the [fee schedule](#) for any Erosion Control permit. These will be calculated after entering your square feet of disturbance within eTrakit.
 - Any Water Quality or Public Works permit must include an associated engineering estimate and deposit per the [fee schedule](#).
 - Obtain an Erosion Control permit for projects disturbing over 500 square feet. In addition to Tualatin's permit if the total disturbed area is:
 - Between one and five acres, submit plans adequate to obtain a National Pollution Discharge Elimination System (NPDES) 1200-CN Stormwater Discharge Permit from Clean Water Services as an agent of Oregon Department of Environmental Quality.
 - Over 5 acres, submit plans adequate to obtain a National Pollution Discharge Elimination System (NPDES) 1200-C Stormwater Discharge Permit from Oregon Department of Environmental Quality.
 - Obtain a Public Works Permit for construction involving public right-of-way, easements, and/or public utilities.
- Obtain a Water Quality Permit for construction of new private and public plus modification of existing public impervious areas. Include:
- All wetland mitigation/revegetation required by your [Clean Water Services' Service Provider Letter](#),
- Tualatin Development Code (TDC) [74.630](#) and [74.650](#),

- Tualatin Municipal Code (TMC) Additional Surface Stormwater Management Standards and Permanent On-Site Water Quality Facilities [3-5-200 through 3-5-430](#),
- [Public Works Construction Code](#) (PWCC), and
 - [Clean Water Services' Design & Construction Standards](#) (CWS) (D&CS) including, but not limited to, Chapter 4 (PDF) – Runoff Treatment and Control.
 - Identify all new private stormwater facilities plus conveyance within a recorded maintenance agreement based on a staff provided template.

Fire

- Alex McGladrey, Tualatin Valley Fire & Rescue (503) 259-1420; alexander.mcgladrey@tvfr.com
- Flow testing: Terrance Leahy, Water Division Manager, (503) 691-3095; [tleahy@tualatin.gov](mailto:t Leahy@tualatin.gov)

Fees

- Current fee schedule: <https://www.tualatinoregon.gov/finance/fee-schedule>
- For calculating SDC fees, please work with Lauren Gonzalez, lgonzalez@tualatin.gov

Interim Climate Friendly and Equitable Communities Policy

In response to Executive Order No. 20-04, DLCD's adoption of Climate-Friendly and Equitable Communities parking management mandates, and Tualatin's approved extension to adopt the applicable regulations by June 30, 2024; the City has instituted a temporary procedure for an applicant to apply regulations as provided in OAR 660-012-0400, OAR 660-012-0405, and OAR 660-012-0415 through OAR 660-012-0420 to a land use application prior to June 30, 2024. This guidance does not change any City ordinances.

QUESTION: How can an applicant seek relief from TDC 32.160 *Application Vesting* and TDC 73C.100 *Off-Street Minimum Parking Requirements*, under Executive Order No. 20-04 and Transportation Planning Rules Chapter 660, Division 12 for land use applications submitted prior to June 30, 2024?

RESPONSE: On January 22, 2024 the Tualatin City Council directed staff to begin a legislative amendment to remove citywide parking minimums, adopt parking maximums in certain areas, and add certain additional regulations for parking areas over ½ acre in size. An applicant may request application of OAR 660-012-0400, OAR 660-012-0405, and OAR 660-012-0415 through OAR 660-012-0420 to a land use application submitted prior to June 30, 2024.

To submit a request:

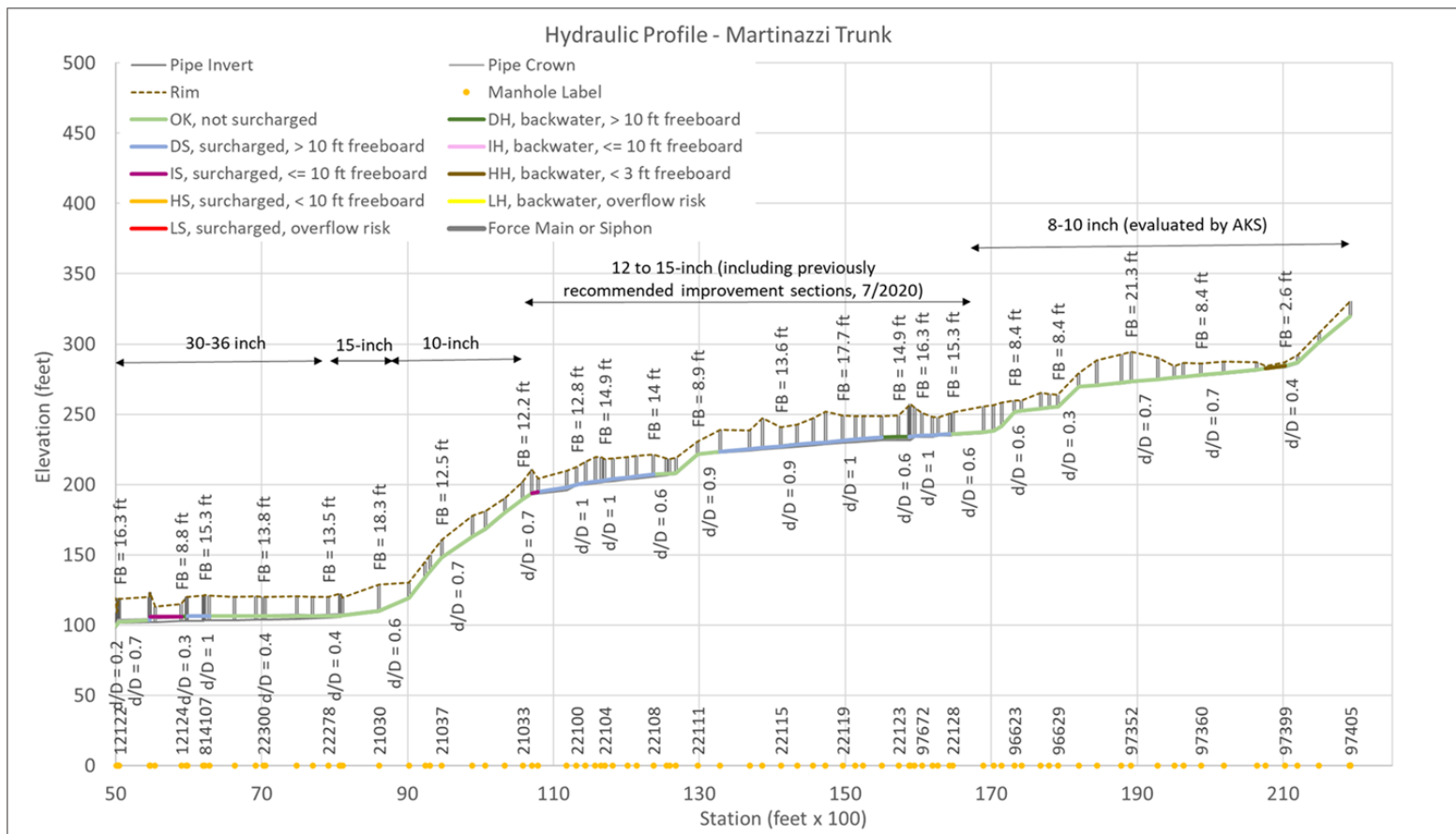
1. Discuss intent with assigned planner during the pre-application meeting or prior to application submittal.
2. Provide narrative findings to address applicable sections of OAR 660-012-0400, OAR 660-012-0405, and OAR 660-012-0415 through OAR 660-012-0420 with your application submittal.
3. Written verification that the applicant desires that all applicable sections of OAR 660-012-0400, OAR 660-012-0405, and OAR 660-012-0415 through OAR 660-012-0420.

This temporary guidance is in effect until June 30, 2024 or until such time adoption of a legislative amendment to remove citywide parking minimums, adopt parking maximums in certain areas, and add certain additional regulations for parking areas over ½ acre in size takes effect.

Jacobs Quick Downstream Sanitary Sewer Capacity Review Based On AKS' Previous Norwood Apartments

Jacobs did a very quick review of downstream capacity with the flows (110 gpm) generated by AKS for the development property's previous proposal. Generally, they state the capacity in the system looks adequate with limited surcharge for wet weather conditions (10 feet of freeboard or greater with few exceptions) and flow within pipe crown for dry weather conditions (less than 80-percent flow depth). Here is a quick snapshot of the pipeline profile and hydraulic gradeline showing the risk categories typical for the City and Clean Water Services downstream system. The analysis includes the improvements previously recommended and document in the attached tech memo for the Martinazzi Trunk. They also included proposed peak flow from the Norwood pump station up to 240 gpm. There are a few pipe segments in the downstream Clean Water Services system with extremely flat slopes that show up slightly surcharged in dry weather conditions.

Typically, they spend more time to document this type of analysis in more detail.



Jacobs Quick Downstream Sanitary Sewer Capacity Review Based On AKS' Previous Norwood Apartments

Figure 1. Wet weather flow, hydraulic profile.

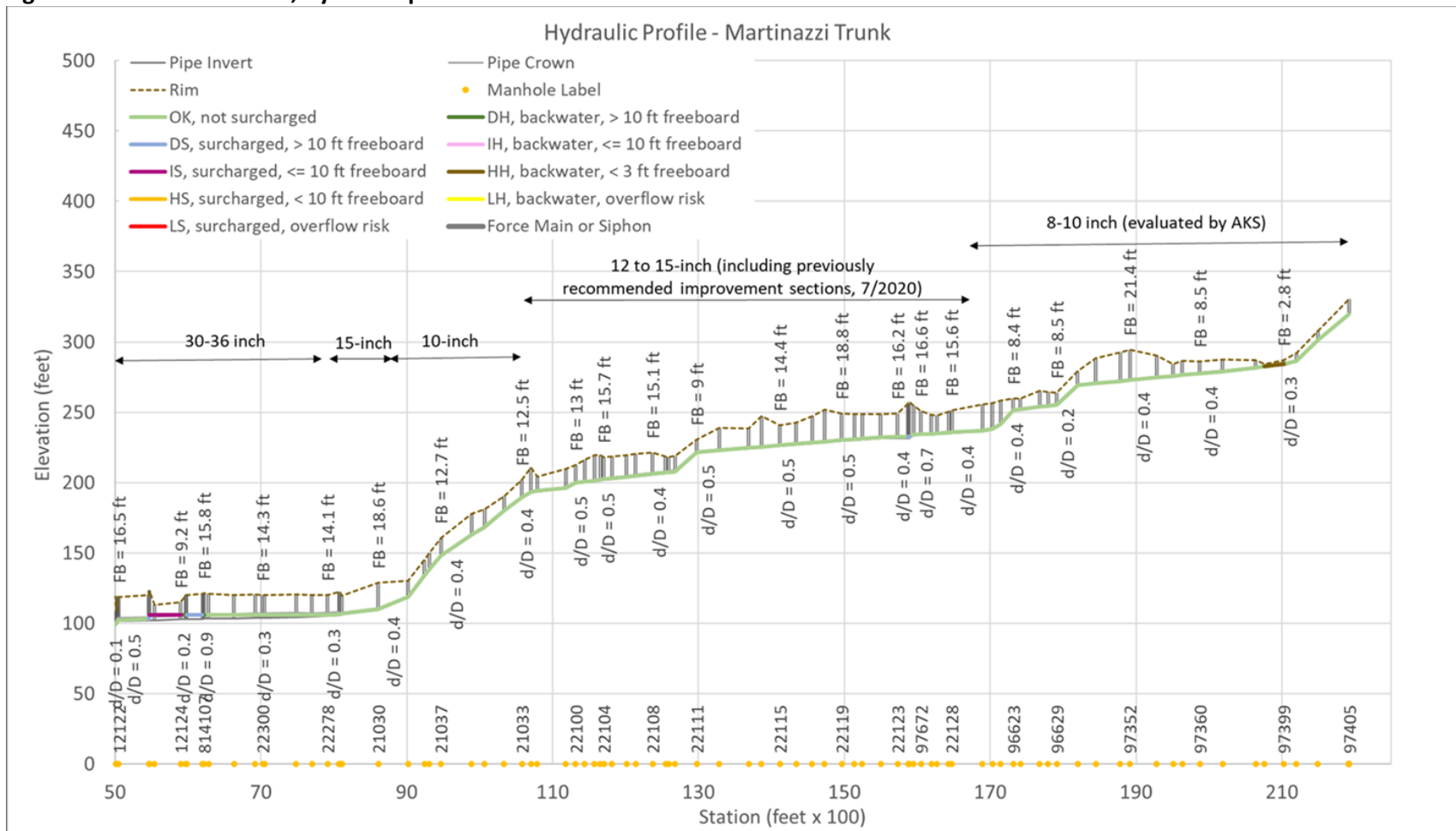


Figure 2. Dry weather flow, hydraulic profile.

File: PMA 24-0004

CERTIFICATION OF SIGN POSTING



In addition to the requirements of TDC 32.150, the 18" x 24" sign must display the meeting date, time, and address as well as a contact phone number.

As the applicant for the PMA24-0004 project, I hereby certify that on this day, OCTOBER 9, 2024 sign(s) was/were posted on the subject property in accordance with the requirements of the Tualatin Development Code and the Community Development Division.

Applicant's Name: KEN ALLEN

(Please Print)

Applicant's Signature: [Handwritten Signature]

Date: 10/9/2024

 **NOTICE** of Hearing
Hearing Date:
PMA 24 - 0004
MONDAY, DECEMBER 9, 2024
7:00 PM
FOR MORE INFORMATION:
TUALATIN.GOV/PROJECTS

 **NOTICE** of Hearing
Hearing Date:
PMA 24 - 0004
MONDAY, DECEMBER 9, 2024
7:00 PM
FOR MORE INFORMATION:
TUALATIN.GOV/PROJECTS

NOTICE of application
Proposal submitted as:
AR23-0014
FOR MORE INFORMATION:
TUALATIN.GOV/PROJECTS

NOTICE of Hearing
Hearing Date:
PMA 24 - 0004
MONDAY, DECEMBER 9, 2024
7:00 PM
FOR MORE INFORMATION:
TUALATIN.GOV/PROJECTS



WASHINGTON COUNTY

Dept. of Land Use & Transportation
Planning and Development Services
Current Planning
155 N. 1st Avenue, #350-13
Hillsboro, OR 97124
Ph. (503) 846-8761 Fax (503) 846-2908
http://www.co.washington.or.us

**Request for Statement of Service
Availability for Schools**

SCHOOL DISTRICT NO.: 88J
Sherwood School District

PRE-APPLICATION DATE: _____

**Service Provider: PLEASE RETURN THIS FORM TO:
APPLICANT:**

COMPANY: Westlake Consultants, Inc.
CONTACT: Ken Sandblast
ADDRESS: 15115 SW Sequoia Parkway, Ste. 150
Tigard, OR 97224
PHONE: 503-684-0652

OWNER(S): Horizon Church
Applicant: Ken Allen / Norwood Horizon Holdings, LLC
ADDRESS: 16998 Greentree Ave.
Lake Oswego, OR 97034

PHONE: _____
Property Desc.: Tax Map(s): _____ Lot Number(s): _____
2S135D TL 108, TL 106 (portion)

Site Size: 8.3 acres
Site Address: 9300 SW Norwood Road, Tualatin
Nearest cross street (or directions to site):
SW Boones Ferry Road

PROPOSED PROJECT NAME: The Norwood Project

PROPOSED DEVELOPMENT ACTION: (DEVELOPMENT REVIEW, SUBDIVISION, MINOR PARTITION, SPECIAL USE)

Comprehensive Plan Map Amendment and Zone Change for 8.3 acres from IN Institutional to RML Medium-Low Residential.

EXISTING USE: Vacant / Parking PROPOSED USE: Single-Family Detached and Attached Residential.

IF RESIDENTIAL: NO. OF DWELLING UNITS: 90-95 IF INDUSTRIAL/COMMERCIAL: TYPE OF USE: _____ IF INSTITUTIONAL: NO. SQ. FT. _____
SINGLE FAM. 90-95 MULTI-FAM. _____ NO. OF SQ. FT. (GROSS FLOOR AREA) _____ NO. STUDENTS/EMPLOYEES/MEMBERS: _____

*******ATTENTION SERVICE PROVIDER*******

**PLEASE INDICATE THE LEVEL OF SERVICE AVAILABLE TO THE SITE.
RETURN THIS COMPLETED FORM TO THE APPLICANT AS LISTED ABOVE.**

(Do NOT return this form to Washington County. The applicant will submit the completed form with their Land Development Application submittal).

SERVICE LEVEL IS **ADEQUATE** TO SERVE THE PROPOSED PROJECT.
SIGNATURE: James Rose POSITION: C.D.O. DATE: 6-20-24

FOR SERVICE LEVEL INFORMATION, SEE ATTACHED LETTER. (Per CDC §501-8.2 A)
SIGNATURE: _____ POSITION: _____ DATE: _____

SERVICE LEVEL IS **INADEQUATE** TO SERVE THE PROPOSED PROJECT.
If the present or future service level is inadequate, please provide information documenting your inability to provide an adequate level of service. Additionally, provide information regarding whether the use of alternative means can be employed to provide an adequate service level. Documentation of adequacy and alternatives to provide an adequate service level may include but not be limited to the following:
1. Amount of bonded indebtedness; 2. Use of double shifting; 3. Extended school periods; 4. Bussing to underutilized facilities; 5. Year-around school; 6. Construction of new facilities; 7. Portable Classrooms; 8. Impact Fees; 9. Any combination of these or other alternatives.

SIGNATURE: _____ POSITION: _____ DATE: _____

Madeleine Nelson

From: Madeleine Nelson
Sent: Wednesday, October 9, 2024 11:26 AM
To: Ken Sandblast; Julia Glisson; Ken Allen; Pastor Randy Campbell
Cc: Steve Koper
Subject: Notice of Hearing: PMA24-0004 "Norwood Plan Map Amendment"
Attachments: PMA 24-0004 Notice.pdf



NOTICE OF HEARING AND OPPORTUNITY TO COMMENT

NOTICE IS HEREBY GIVEN that a public hearing will be held before the City of Tualatin City Council at 7:00 p.m., **Monday, December 9, 2024**, held online over Zoom and additionally accessible at the Tualatin City Services Building (10699 SW Herman Road).

Westlake Consultants Inc., on behalf of Norwood Horizon Holdings, LLC and Property Owner Horizon Community Church, request approval of:

A Plan Map Amendment PMA 24-0004: The proposal requests the zone change from Institutional (IN) to Medium-Low Density Residential (RML) for property located on an 8.3-acre site at 23370 SW Boones Ferry Road (Tax Lot: 2S135D000106).

You may view the application materials on our Projects web page: <https://www.tualatinoregon.gov/planning/pma24-0004-norwood-plan-map-amendment>

Comments due for staff report: **November 20, 2024**. Comments made after that date but prior to the close of the written record will be included in the written record but may not be included in the staff report to the City Council.

To grant the amendment, Council must find the proposal meets the applicable criteria of Tualatin Development Code (TDC) Chapters 32 and 33 and the Tualatin Comprehensive Plan; Applicable Oregon Statewide Planning Goals; Applicable Oregon Administrative Rules including compliance with the Transportation Planning Rule; and Metropolitan Service District's Urban Growth Management Functional Plan.

Individuals wishing to comment may do so in writing to the Planning Division prior to the hearing and/or present written and/or verbal testimony to the City Council at the hearing prior to the close of the written record. Testimony should be directed to the applicable criteria or those criteria the person testifying believes apply.

The public hearing process begins with a staff presentation, followed by testimony by proponents, testimony by opponents, and rebuttal. Individual testimony may be limited. At the conclusion of the hearing, the City Council will deliberate and make a decision based on the facts and arguments in the public record. Before the hearing is closed, a participant may request that the record remain open for at least seven days after the hearing.

Everyone is invited to attend the hearing and comment on the application’s approval criteria. Failure of an issue to be raised in the hearing, in person, or by letter, or failure to provide sufficient specificity to afford the decision maker an opportunity to respond to the issue precludes appeal to the State Land Use Board of Appeals (LUBA) based on that issue. The failure of the applicant to raise constitutional or other issues relating to proposed conditions of approval with sufficient specificity to the decision maker to respond to the issue precludes an action for damages in circuit court.

A copy of the staff report, findings, and draft Ordinance on PMA 24-0004 will be available one week before the hearing at: <https://www.tualatinoregon.gov/citycouncil>.

Application materials are public record and are available for review. Copies can be viewed online or obtained at a reasonable cost, by contacting the Planning Division (503-691-3026 or planning@tualatin.gov).



Madeleine Nelson
Assistant Planner
Planning Division
Phone: 503.691.3027
tualatinoregon.gov

Madeleine Nelson

From: Madeleine Nelson
Sent: Wednesday, October 9, 2024 11:27 AM
To: Sherilyn Lombos; Don Hudson; Kim McMillan; Steve Koper; Heather Heidel; Kevin McConnell; Mike McCarthy; Tony Doran; Hayden Ausland; Tom Scott; Martin Loring; Rich Mueller; Ross Hoover; Tom Steiger; Terrance Leahy; Erin Engman; Keith Leonard; Lindsey Hagerman
Cc: planning@sherwoodoregon.gov; neamtzu@ci.wilsonville.or.us; Dyami_Valentine@washingtoncountyor.gov; theresa_cherniak@co.washington.or.us; deqinfo@deq.state.or.us; landusenotifications@oregonmetro.gov; ODOT_R1_DevRev@odot.oregon.gov; baldwinb@trimet.org; LUComments@cleanwaterservices.org; alex.mcgladrey@tvfr.com; KHerrod@republicservices.com; trose1@ttsd.k12.or.us; gbennett@sherwood.k12.or.us; info@theintertwine.org; Anneleah@tualatinchamber.com; OR.METRO.ENGINEERING@ZIPLY.COM; tod.shattuck@pgn.com; brandon.fleming@pgn.com; kenneth.spencer@pgn.com; David Underwood; richard.girard@nwnatural.com; icrawford@wccca.com
Subject: Notice of Hearing: PMA24-0004 "Norwood Plan Map Amendment"
Attachments: PMA 24-0004 Notice.pdf



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A copy of the staff report, findings, and draft Ordinance on PMA 24-0004 will be available one week before the hearing at: <https://www.tualatinoregon.gov/citycouncil>.

Application materials are public record and are available for review. Copies can be viewed online or obtained at a reasonable cost, by contacting the Planning Division (503-691-3026 or planning@tualatin.gov).



Madeleine Nelson
Assistant Planner
Planning Division
Phone: 503.691.3027
tualatinoregon.gov

Madeleine Nelson

From: Madeleine Nelson
Sent: Wednesday, October 9, 2024 11:28 AM
To: tualatincio@gmail.com; Megan George; Riverparkcio@gmail.com; jasuw7@gmail.com; christine@newmountaingroup.com; rockybixby@hotmail.com; katepinamonti@hotmail.com; cynmartz12@gmail.com; daniel@bachhuber.co; cio.East.west@gmail.com; doug_ulmer@comcast.net; keenanwoods7@gmail.com; keenanwoods7@gmail.com; dana476@gmail.com; crowell248@gmail.com; tualatinmidwestcio@gmail.com; tmpgarden@comcast.net; sixgill@comcast.net; jdrs80@gmail.com; snoelluwcwle@yahoo.com; danytyrell@gmail.com; MartinazziWoodsCIO@gmail.com; solson.1827@gmail.com; delmoore@frontier.com; jamison.l.shields@gmail.com; ClaudiaSterling68@gmail.com; abusichert@gmail.com; roydloop@gmail.com; TualatinIbachcio@gmail.com; Parsons.Patricia@outlook.com; afbohn@gmail.com; edkcnw@comcast.net; fiskelady@hotmail.com; clinefelters@outlook.com; Byromcio@gmail.com; timneary@gmail.com; jujuheir@aol.com; dtcme99@comcast.net; katzmari22@gmail.com; mwestenhaver@hotmail.com; tualatincommercialcio@gmail.com; tualatincommercialcio@gmail.com; scottm@capacitycommercial.com; scottm@capacitycommercial.com; ksdrangsholt@yahoo.com; christine@newmountaingroup.com; robertekellogg@yahoo.com; sonyanybergrygh@gmail.com
Cc: Steve Koper
Subject: Notice of Hearing: PMA24-0004 "Norwood Plan Map Amendment"
Attachments: PMA 24-0004 Notice.pdf



NOTICE OF HEARING AND OPPORTUNITY TO COMMENT

NOTICE IS HEREBY GIVEN that a public hearing will be held before the City of Tualatin City Council at 7:00 p.m., **Monday, December 9, 2024**, held online over Zoom and additionally accessible at the Tualatin City Services Building (10699 SW Herman Road).

Westlake Consultants Inc., on behalf of Norwood Horizon Holdings, LLC and Property Owner Horizon Community Church, request approval of:

A Plan Map Amendment PMA 24-0004: The proposal requests the zone change from Institutional (IN) to Medium-Low Density Residential (RML) for property located on an 8.3-acre site at 23370 SW Boones Ferry Road (Tax Lot: 2S135D000106).

You may view the application materials on our Projects web page: <https://www.tualatinoregon.gov/planning/pma24-0004-norwood-plan-map-amendment>

Comments due for staff report: **November 20, 2024**. Comments made after that date but prior to the close of the written record will be included in the written record but may not be included in the staff report to the City Council.

To grant the amendment, Council must find the proposal meets the applicable criteria of Tualatin Development Code (TDC) Chapters 32 and 33 and the Tualatin Comprehensive Plan; Applicable Oregon Statewide Planning Goals; Applicable Oregon Administrative Rules including compliance with the Transportation Planning Rule; and Metropolitan Service District's Urban Growth Management Functional Plan.

Individuals wishing to comment may do so in writing to the Planning Division prior to the hearing and/or present written and/or verbal testimony to the City Council at the hearing prior to the close of the written record. Testimony should be directed to the applicable criteria or those criteria the person testifying believes apply.

The public hearing process begins with a staff presentation, followed by testimony by proponents, testimony by opponents, and rebuttal. Individual testimony may be limited. At the conclusion of the hearing, the City Council will deliberate and make a decision based on the facts and arguments in the public record. Before the hearing is closed, a participant may request that the record remain open for at least seven days after the hearing.

Everyone is invited to attend the hearing and comment on the application's approval criteria. Failure of an issue to be raised in the hearing, in person, or by letter, or failure to provide sufficient specificity to afford the decision maker an opportunity to respond to the issue precludes appeal to the State Land Use Board of Appeals (LUBA) based on that issue. The failure of the applicant to raise constitutional or other issues relating to proposed conditions of approval with sufficient specificity to the decision maker to respond to the issue precludes an action for damages in circuit court.

A copy of the staff report, findings, and draft Ordinance on PMA 24-0004 will be available one week before the hearing at: <https://www.tualatinoregon.gov/citycouncil>.

Application materials are public record and are available for review. Copies can be viewed online or obtained at a reasonable cost, by contacting the Planning Division (503-691-3026 or planning@tualatin.gov).



Madeleine Nelson
Assistant Planner
Planning Division
Phone: 503.691.3027
tualatinoregon.gov



AFFIDAVIT OF MAILING

STATE OF OREGON)

) ss

COUNTY OF WASHINGTON)

I, Lindsey Hagerman being first duly sworn, deposed and say:

That on the 9th day of October, I served upon the persons shown on Exhibit A, attached hereto and by this reference incorporated herein, a copy of a Notice of Hearing/Application/Decision marked Exhibit B, attached hereto and by this reference incorporated herein, by mailing to them a true and correct copy of the original hereof. I further certify that the addresses reflect information received from the relevant party or agency, and that said envelopes were placed in the United States Mail at Tualatin, Oregon, prepared to receive postage administered by city staff.

Dated this 28th of, October 2023


Signature

SUBSCRIBED AND SWORN to before me this 10/28/2024




Notary Public for Oregon

My commission expires: 1&12-2.02-7

RE: PMA24-0004 NOTICE OF HEARING



NOTICE OF PUBLIC HEARING AND OPPORTUNITY TO COMMENT
CASE FILE: PMA 24-0004 — Norwood Plan Map Amendment

Exhibit B.

NOTICE IS HEREBY GIVEN that an application for a Plan Map Amendment (PMA 24-0004) will be heard by Tualatin City Council:

Monday, December 9, 2024 at 7 pm

Tualatin City Services Building
 10699 SW Herman Road

To view the application materials visit:
www.tualatinoregon.gov/projects

TO PROVIDE COMMENTS:

Email: mnelson@tualatin.gov

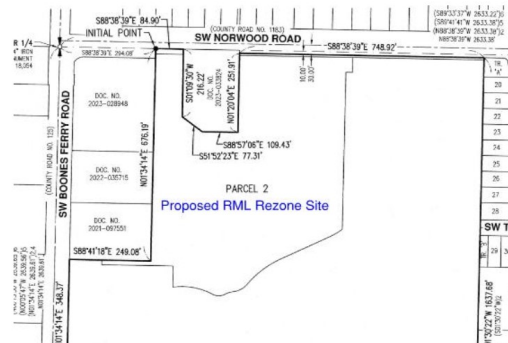
Mail: Planning Division
 Attn: Madeleine Nelson
 10699 SW Herman Road
 Tualatin, OR 97062

Questions?: 503-691-3027

To attend the hearing, there are two options:

- **Zoom Teleconference.** Details at: www.tualatinoregon.gov/citycouncil/council-meetings
- **Attend in person at the Tualatin City Services Building.**

Westlake Consultants, Inc., on behalf of Norwood Horizon Holdings, LLC and Property Owner Horizon Community Church, propose a Plan Map Amendment application located on an 8.3-acre site at 23370 SW Boones Ferry Road (Tax Lot: 25135D000106).



Plan Map Amendment (PMA 24-0004): The proposal requests the zone change from Institutional (IN) to Medium Low Density Residential (RML)

- **Criteria:** Tualatin Development Code (TDC) Chapters 32 and 33; Tualatin Comprehensive Plan; Applicable Oregon Statewide Planning Goals; Applicable Oregon Administrative Rules including compliance with the Transportation Planning Rule; and Metropolitan Service District's Urban Growth Management Functional Plan.
- **Application materials** are public record and are available for review. Copies



NOTICE OF PUBLIC HEARING AND OPPORTUNITY TO COMMENT
CASE FILE: PMA 24-0004 — Norwood Plan Map Amendment

NOTICE IS HEREBY GIVEN that an application for a Plan Map Amendment (PMA 24-0004) will be heard by Tualatin City Council:

Monday, December 9, 2024 at 7 pm

Tualatin City Services Building
 10699 SW Herman Road

To view the application materials visit:
www.tualatinoregon.gov/projects

TO PROVIDE COMMENTS:

Email: mnelson@tualatin.gov

Mail: Planning Division
 Attn: Madeleine Nelson
 10699 SW Herman Road
 Tualatin, OR 97062

Questions?: 503-691-3027

To attend the hearing, there are two options:

- **Zoom Teleconference.** Details at: www.tualatinoregon.gov/citycouncil/council-meetings
- **Attend in person at the Tualatin City Services Building.**

Westlake Consultants, Inc., on behalf of Norwood Horizon Holdings, LLC and Property Owner Horizon Community Church, propose a Plan Map Amendment application located on an 8.3-acre site at 23370 SW Boones Ferry Road (Tax Lot: 25135D000106).



Plan Map Amendment (PMA 24-0004): The proposal requests the zone change from Institutional (IN) to Medium Low Density Residential (RML)

- **Criteria:** Tualatin Development Code (TDC) Chapters 32 and 33; Tualatin Comprehensive Plan; Applicable Oregon Statewide Planning Goals; Applicable Oregon Administrative Rules including compliance with the Transportation Planning Rule; and Metropolitan Service District's Urban Growth Management Functional Plan.
- **Application materials** are public record and are available for review. Copies



can be viewed online or obtained at a reasonable cost, by contacting the Planning Division.

- **Staff report materials** will be available for inspection at no cost, at least seven days prior to the hearing. Copies can be obtained for a reasonable cost.
- **Individuals wishing to comment** may do so via email (mnelson@tualatin.gov) or in writing to the Planning Division prior to the hearing and/or present written and/or verbal testimony at the City Council hearing prior to the close of the written record. Comments should address the identified approval criteria or those criteria that the person commenting believes apply.
- **The public hearing process** begins with a staff presentation, followed by testimony by proponents, testimony by opponents, and rebuttal. Individual testimony may be limited. At the conclusion of the hearing, the City Council will deliberate and make a decision based on the facts and arguments in the public record. Before the hearing is closed, a participant may request that the record remain open for at least seven days after the hearing.
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- A copy of the staff report, exhibits, and findings for PMA 24-0004 will be available one week before the hearing at: <https://www.tualatinoregon.gov/citycouncil>.

For additional information contact:

Madeleine Nelson, Assistant Planner: mnelson@tualatin.gov, 503-691-3027

10699 SW Herman Rd, Tualatin, Oregon 97062 TualatinOregon.gov



can be viewed online or obtained at a reasonable cost, by contacting the Planning Division.

- **Staff report materials** will be available for inspection at no cost, at least seven days prior to the hearing. Copies can be obtained for a reasonable cost.
- **Individuals wishing to comment** may do so via email (mnelson@tualatin.gov) or in writing to the Planning Division prior to the hearing and/or present written and/or verbal testimony at the City Council hearing prior to the close of the written record. Comments should address the identified approval criteria or those criteria that the person commenting believes apply.
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For additional information contact:

Madeleine Nelson, Assistant Planner: mnelson@tualatin.gov, 503-691-3027

10699 SW Herman Rd, Tualatin, Oregon 97062 TualatinOregon.gov

TLID

2S135BD04700
2S135CD00300
2S135AD03900
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2S135AC08100
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2S135AC15000
2S135AD14300
2S135D000109
2S135BD10500
2S135BD11200
2S135BD00500
2S135AC14900

OWNER1

9860 LUMBEE LANE TRUST
AGHAZADEH-SANAEI MEHDI & ASIAEE NAHID
AGORIO DIANA
ALLARD JOHN A & ALLARD KELCIE L
ALLEN BENJAMIN & ALLEN ERIKA
ALLISON VICKI R
ANDERSON SCOTT A & ANDERSON ANDREA N
ANDERSON RICHARD J JR
ANDERSON ANGELA RENEE & ANDERSON VAN L
ANDYKE BRYAN P & ANDYKE RACHEL E
ANTHIMIADES GEORGE T & ANTHIMIADES STEPHANIE J
APLIN ALAN WHITNEY & APLIN PATRICIA ANN
ARCHULETA JOHN L & ARCHULETA ELISHA J
ARCIGA MARCO A & ARCIGA VIRGINIA L
ATKINS DANIEL J & ATKINS DAWNITA G
AUGEE JOEL L & AUGEE HEIDI M S
AUST JOSEPHINE A & AUST KENNETH G
AUSTIN MICHAEL P & AUSTIN ALLISON M
AUTUMN SUNRISE HOMEOWNER ASSOCIATION
AUTUMN SUNRISE HOMEOWNER ASSOCIATION
AUTUMN SUNRISE HOMEOWNER ASSOCIATION
AUTUMN SUNRISE HOMEOWNER ASSOCIATION
AUTUMN SUNRISE HOA
BABCOCK GAYLON
BACA GREGORY R & BACA ELIZABETH R
BAILEY JILL
BALLARD FAMILY TRUST
BARRY CHRISTOPHER & BARRY ERIN
BATES-BLANCO FAMILY TRUST
BATUGEDARA THARANGA & WIJAYASUNDARA KELUM LAKSHITHA
BAVARO EMILY EVELYN & BAVARO JOSHUA
BAZANT CHRISTINE LEE & BAZANT JOHN JOSEPH
BEAR ALISA ANN TRUST
BECKER SUSAN
BECKEN LLC
BECKSTEAD BRIAN A & BECKSTEAD ZERELDA G
BEDDES CRISTINA & BEDDES AARON
BEEBE BRENT E & BEEBE SANDRA L
BEIKMAN STEPHEN & BEIKMAN MONIQUE
BELL JAMES M & BELL EVA J
BELL REV TRUST
BENNETT JASON M & MCALEER MARGUERITE T
BERG BRIAN & BERG ANYA
BERG BRIAN & BERG ANYA
BEYERLE BRETT & BEYERLE ERIC
BLACK JENNIFER O & BLACK DAVID O JR
BOCCI JAMES A & BOCCI JULIA A
BODGE JACOB & PHAM-BODGE GIANG
BOELL DONALD B & BOELL PATRICIA J
BOHMAN FAMILY TRUST
BOLTON SAMANTHA PAIGE & BOLTON BRENT ANDREW
BOSKET JOHN A & JULIE L BOSKET LIV TRUST
BOX MICHAEL L & BOX KATIE M
BRADEN HAILEY AMELIA & BRADEN GUNNAR THOMAS
BRECK KOLTE TRISTON & BRECK DANIELLE NICOLE
BRENES VALERIE & BRENES GERARDO MANUEL
BRIDGE CHURCH NW THE
BROADHURST CURTIS
BROWN KATHERINE MARIE & BROWN CHRISTOPHER DAVID
BUCKALEW LIVING TRUST
BUHAY JASON & BUHAY MICHELLE

OWNERADDR	OWNERCITY	OWNERSTATE	OWNERZIP
9860 SW LUMBEE LN	TUALATIN	OR	97062
23745 SW BOONES FERRY RD	TUALATIN	OR	97062
22790 SW 87TH PL	TUALATIN	OR	97062
8885 SW IOWA DR	TUALATIN	OR	97062
23131 SW DARBY AVE	TUALATIN	OR	97062
8994 SW STONO DR	TUALATIN	OR	97062
22825 SW 92ND PL	TUALATIN	OR	97062
22630 SW 93RD TER	TUALATIN	OR	97062
8805 SW MOHEGAN LN	TUALATIN	OR	97062
8815 SW MOHEGAN LN	TUALATIN	OR	97062
8735 SW STONO DR	TUALATIN	OR	97062
22940 SW ENO PL	TUALATIN	OR	97062
9385 SW SKOKOMISH LN	TUALATIN	OR	97062
22550 SW 93RD TER	TUALATIN	OR	97062
22570 SW 93RD TER	TUALATIN	OR	97062
8905 SW IOWA DR	TUALATIN	OR	97062
8846 SW STONO DR	TUALATIN	OR	97062
9325 SW IOWA DR	TUALATIN	OR	97062
11807 NE 99TH ST STE 1170	VANCOUVER	WA	98682
11807 NE 99TH ST STE 1170	VANCOUVER	WA	98682
11807 NE 99TH ST STE 1170	VANCOUVER	WA	98682
11807 NE 99TH ST STE 1170	VANCOUVER	WA	98682
PO BOX 6597	BEAVERTON	OR	97007
8680 SW STONO DR	TUALATIN	OR	97062
16869 SW 65TH AVE #387	LAKE OSWEGO	OR	97035
3657 SE ROANOKE CT	HILLSBORO	OR	97123
22925 SW MIAMI PL	TUALATIN	OR	97062
23065 SW BOONES FERRY RD	TUALATIN	OR	97062
22648 SW 96TH DR	TUALATIN	OR	97062
8765 SW MOHEGAN LN	TUALATIN	OR	97062
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22675 SW 87TH	TUALATIN	OR	97062
22567 SW 96TH DR	TUALATIN	OR	97062
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9355 SW STONO DR	TUALATIN	OR	97062
9370 SW PALOUSE LN	TUALATIN	OR	97062
8795 SW MOHEGAN LN	TUALATIN	OR	97062
9290 SW STRONO DR	TUALATIN	OR	97062
22830 SW 89TH PL	TUALATIN	OR	97062
PO BOX 44	WILSONVILLE	OR	97070
22543 SW 96TH DR	TUALATIN	OR	97062
22683 SW 96TH DR	TUALATIN	OR	97062
22943 SW BOONES FERRY RD	TUALATIN	OR	97062
9300 SW STONO DR	TUALATIN	OR	97062

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2S135BC02000
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BUICH CORRINE
 BUNCE MICHAEL R REVOC LIV TRUST & BUNCE DEBORAH J REVOC LIV TRUST
 BURCHFIEL LARRY & BURCHFIEL DEBORAH
 BURCHETT KENNETH T & JOY A JOINT LIV TRUST
 BURNS DANIEL D & KRILL DEANN R
 CAIS CARLY J
 CALDERON FAMILY TRUST
 CALKINS MICHAEL & CALKINS DIANE
 CARBAJAL PEDRO & CARBAJAL REGINA
 CARDENAS FERNANDO
 CARNS STEVEN C
 CHAFF HEIDI L
 CHAMBERLAND MATHEW & CHAMBERLAND JAMES W
 CHAMBERLAIN JOHN & CHAMBERLAIN DEBRA
 CHAMBERLAIN JOHN & CHAMBERLAIN DEBRA
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 CHAMBERLAIN JOHN & CHAMBERLAIN DEBRA
 CHAMBERLAIN JOHN & CHAMBERLAIN DEBRA
 CHAMPAGNE PATRICK & ROY CELINE
 CHAMSEDDINE WAEL M & CHAMSEDDINE BECKY A
 CHAN JOSEPH L
 CHAN CHEUK YEE CHAN REVOC LIV TRUST
 CHAPEK CARRIEANN & CHAPEK CALEB
 CHASE HARRY M & CHASE CATHY LEE
 CHILDS ROBERT M & CHILDS MARY J
 CHIZUM EMMA JANE & DAHLSTROM MATTHEW LEE
 CHRISTENSEN STANFORD DEE & CAROL MAE REV INTERVIVOS TRUST
 CLARK ROY H
 CLEAN WATER SERVICES
 COBB DANIEL Z & COBB ROSA
 COKELEY HEATHER & COKELEY KEITH
 COLE STEVEN W & ROBERTS ANDREA M
 COMPTON MARC A & COMPTON JODY L
 CONFER ANDREW B
 COOPER JULIE ANN LIV TRUST
 CORRY FAMILY TRUST
 CPAH PLAMBECK LIMITED PARTNERSHIP
 CRAWFORD JASON S
 CRISP TONI K
 CROY TRICIA
 CRUZ ALEJANDRO FRANCISCO
 CURTHOYS CAROL ANN REV LIV TRUST
 CYPRESS & STONE LLC
 DARLING LANCE F
 DAVIS JASON WAYNE
 DEARDORFF CRAIG S & DEARDORFF ALBERTA
 DICKMAN SCOTT D & CHEN WEIWEN
 DIETRICH ROBERT & DIETRICH SUSAN
 DIFFEE JASON DOUGLAS & DIFFEE SOFIA MURIEL & DIFFEE BRIAN DOUGLAS
 DITTMAN ADAM H & DITTMAN ELIZABETH A C
 DOSS ANDREA & DOSS BRANDON
 DOW PETER J REV TRUST & SHERFY JENNIFER L REV TRUST
 DOWNES ADRIAN & DOWNES CATHERINE
 DRAKE ADAM A & DRAKE KATHERYNE MICHELLE
 DUFFY RONALD E TRUST
 DUNN PATRICK P & DUNN CLARA I RUSINQUE
 DUNN KARIN R
 EAKINS EILEEN G
 EASTON ANITA & EASTON KENNETH

22985 SW MIAMI PL	TUALATIN	OR	97062
9150 SW IOWA DR	TUALATIN	OR	97062
8858 SW STONO DR	TUALATIN	OR	97062
9700 SW IOWA DR	TUALATIN	OR	97062
9345 SW QUINAULT LN	TUALATIN	OR	97062
9340 SW STONO DR	TUALATIN	OR	97062
22735 SW 92ND PL	TUALATIN	OR	97062
8890 SW STONO DR	TUALATIN	OR	97062
8925 SW IOWA DR	TUALATIN	OR	97062
9340 SW QUINAULT LN	TUALATIN	OR	97062
9335 SW QUINAULT LN	TUALATIN	OR	97062
22626 SW 96TH DR	TUALATIN	OR	97062
8975 SW IOWA DR	TUALATIN	OR	97062
9000 SW GREENHILL LN	TUALATIN	OR	97062
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23156 BLAND CIR	WEST LINN	OR	97068
22800 SE VERMILION DR	TUALATIN	OR	97062
9360 SW SKOKOMISH LN	TUALATIN	OR	97062
8799 SW STONO DR	TUALATIN	OR	97062
22705 SW VERMILLION DR	TUALATIN	OR	97062
8760 SW MOHEGAN LN	TUALATIN	OR	97062
23544 SW GAGE RD	WILSONVILLE	OR	97070
9295 SW PALOUSE LN	TUALATIN	OR	97062
16060 SW 85TH AVE	TIGARD	OR	97224
22770 SW 89TH PL	TUALATIN	OR	97062
9320 SW IOWA DR	TUALATIN	OR	97062
22850 SW ENO PL	TUALATIN	OR	97062
22151 SW ANTIOCH DOWNS CT	TUALATIN	OR	97062
22575 SW 87TH PL	TUALATIN	OR	97062
9390 SW IOWA DR	TUALATIN	OR	97062
22905 SW MIAMI DR	TUALATIN	OR	97062
6380 SW CAPITOL HWY #151	PORTLAND	OR	97239
9563 SW IOWA DR	TUALATIN	OR	97062
9380 SW IOWA DR	TUALATIN	OR	97062
8976 SW STONO DR	TUALATIN	OR	97062
9270 SW SKOKOMISH LN	TUALATIN	OR	97062
8879 SW IOWA DR	TUALATIN	OR	97062
5930 SW MERIDIAN WAY	TUALATIN	OR	97062
22865 SW 94TH TER	TUALATIN	OR	97062
9180 SW STONO DR	TUALATIN	OR	97062
22595 SW 93RD TER	TUALATIN	OR	97062
22955 SW ERIO PL	TUALATIN	OR	97062
9650 SW IOWA DR	TUALATIN	OR	97062
22605 SW 87TH PL	TUALATIN	OR	97062
22785 SW 89TH PL	TUALATIN	OR	97062
22580 SW 94TH TER	TUALATIN	OR	97062
9360 SW QUINAULT LN	TUALATIN	OR	97062
22945 SW MIAMI PL	TUALATIN	OR	97062
23184 SW DARBY AVE	TUALATIN	OR	97062
9795 SW IOWA DR	TUALATIN	OR	97062
9380 SW PALOUSE LN	TUALATIN	OR	97062
9500 SW IOWA DR	TUALATIN	OR	97062
22760 SW 93RD TERR	TUALATIN	OR	97062
22915 SW ERIO PL	TUALATIN	OR	97062

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EDELINE JENNIFER A & EDELINE SEAN M
 EDWARDS DANIELLE
 EISENSTEIN ETHAN & EISENSTEIN MEGAN
 ELLIOTT WESLEY & ELLIOTT TERRA
 ELLIS FAMILY REV TRUST
 ENNIS MARK & ENNIS BARBARA
 ERDMAN PAUL & ERDMAN PAMALA B
 ERWERT EMILY
 ESZLINGER ERIC & ESZLINGER NATASHA
 FADLING JULIE H
 FANT BRIAN ALAN & DEBORAH SPARCK TRUST
 FEUCHT DANIEL & BEVERLY LIV TRUST
 FILANTRES GUST J & FILANTRES CYNTHIA K
 FINDERS DEBRA P
 FITZHENRY VIRGINIA LIV TRUST
 FLETCHER CRAIG A & FLETCHER JENINE F
 FORCE LIVING TRUST
 FOSSE PATRICIA J & FOSSE RANDY C
 FOWLER TREVOR & FOWLER KAYLA
 FRANCIS FRANK J & FRANCIS HELEN MARIE
 FRANCIS KATHLEEN
 FRANKS TERRENCE D
 FRAVEL LINDA SHAW TRUST
 FRENCH RODERICK LEE & FRENCH THERESE LYNN
 FRIBLEY SARAH E & FRIBLEY CHAD C
 FRITTS REV TRUST
 FRONIUS FAMILY TRUST
 FRY ALBERTA A TRUST
 FULLER ERIC M & FULLER XIAOYAN
 FWJ LIV TRUST
 GALANG JAN VINCENT SUNGA & GALANG CINDY BUSTOS
 GALVER ROBERTO & GALVER PATRICIA BYRNE
 GAMACHE ROBERT R & GAMACHE CHERI M
 GANEY DANIEL T & BELLINGHAM TAUNI A
 GARIBAY JAIME
 GARRETT LIV TRUST
 GEHLKEN MICHELLE RENEE & GEHLKEN HENRY DOUGLAS JR
 GENSLER KRISTOPHER & GENSLER MARIAH
 GEORGE TIMOTHY P & GEORGE BETHANY
 GEORGE REV LIV TRUST
 GHODS SHAWN M & GHODS JENNA N
 GHODS AHMAD & MARY L LIV TRUST
 GIACCHI ROBYN TRUST
 GIBSON JESSE & GIBSON DARCI
 GIESS SIMONE ELISABETH & IVERSON SEAN PATRICK
 GILBERT CHRISTOPHER S & GILBERT TAYLOR A
 GILCHRIST BEVERLY & GILCHRIST ROLAND T
 GILLARD DAVID J & GILLARD SHELLIE S
 GILLETT CHRIS & GILLETT BETSY
 GILLETT GINNY & STROUPE DYLAN PAUL
 GILLIHAN THOMAS M TRUST
 GITTINS MICHELLE & STEWART JENA LEIGH
 GLAESER CHARLES W & GLAESER CHRISTA M
 GLASS BRIAN D & GLASS LEAH M
 GLUKFELD GEORGE A & DEVINE MICHELE M
 GOFORTH NATHAN L & TAAFFE JULIA C
 GOODY GREGORY & GOODY BRITTANY
 GOUY PHIL
 GRANDON JOINT TRUST
 GREEN JUSTIN J
 GREGORY JOSHUA T
 GREGSON N DEAN & GREGSON DEBORAH U

9350 SW QUINAULT LN	TUALATIN	OR	97062
22585 SW 93RD TER	TUALATIN	OR	97062
22750 SW VERMILLION DR	TUALATIN	OR	97062
9521 SW IOWA DR	TUALATIN	OR	97062
9640 SW IOWA DR	TUALATIN	OR	97062
9380 SW STONO DR	TUALATIN	OR	97062
8862 SW STONO DR	TUALATIN	OR	97062
22915 SW 94TH TER	TUALATIN	OR	97062
9395 SW QUINAULT LN	TUALATIN	OR	97062
22630 SW VERMILLION DR	TUALATIN	OR	97062
22680 SW ENO PL	TUALATIN	OR	97062
22715 SW 87TH PL	TUALATIN	OR	97062
9630 SW IOWA DR	TUALATIN	OR	97062
9355 SW PALOUSE LN	TUALATIN	OR	97062
7015 SW FOXFIELD CT	PORTLAND	OR	97225
9840 SW LUMBEE LN	TUALATIN	OR	97062
9365 SW PALOUSE LN	TUALATIN	OR	97062
22925 SW MANDAN DR	TUALATIN	OR	97062
22645 SW VERMILLION DR	TUALATIN	OR	97062
9130 SW IOWA DR	TUALATIN	OR	97062
9345 SW SKOKOMISH LN	TUALATIN	OR	97062
22730 SW 90TH PL	TUALATIN	OR	97062
9365 SW SKOKOMISH LN	TUALATIN	OR	97062
9080 SW STONO DR	TUALATIN	OR	97062
9005 SW STONO DR	TUALATIN	OR	97062
22945 SW ENO PL	TUALATIN	OR	97062
22650 SW 87TH PL	TUALATIN	OR	97062
9175 SW STONO DR	TUALATIN	OR	97062
9365 SW QUINAULT LN	TUALATIN	OR	97062
8822 SW STONO DR	TUALATIN	OR	97062
9400 SW IOWA DR	TUALATIN	OR	97062
22995 SW VERMILLION DR	TUALATIN	OR	97062
22770 SW VERMILLION DR	TUALATIN	OR	97062
22556 SW 96TH DR	TUALATIN	OR	97062
22555 SW 94TH TER	TUALATIN	OR	97062
22970 SW MIAMI PL	TUALATIN	OR	97062
23070 SW VERMILLION DR	TUALATIN	OR	97062
8540 SW MARICOPA DR	TUALATIN	OR	97062
9335 SW IOWA DR	TUALATIN	OR	97062
22695 SW ENO PL	TUALATIN	OR	97062
22815 SW 89TH PL	TUALATIN	OR	97062
23150 SW 89TH AVE	TUALATIN	OR	97062
8900 SW IOWA DR	TUALATIN	OR	97062
8845 SW TUTELO LN	TUALATIN	OR	97062
9355 SW QUINAULT LN	TUALATIN	OR	97062
22680 SW 87TH PL	TUALATIN	OR	97062
9310 SW IOWA ST	TUALATIN	OR	97062
22680 SW MIAMI DR	TUALATIN	OR	97062
22604 SW 96TH DR	TUALATIN	OR	97062
23168 SW DARBY AVE	TUALATIN	OR	97062
22870 SW ENO PL	TUALATIN	OR	97062
8745 SW MOHEGAN LN	TUALATIN	OR	97062
8955 SW IOWA DR	TUALATIN	OR	97062
8900 SW SWEET DR #537	TUALATIN	OR	97062
22975 SW ERIO PL	TUALATIN	OR	97062
22755 SW 90TH PL	TUALATIN	OR	97062
22830 SW ENO PL	TUALATIN	OR	97062
8995 SW IOWA DR	TUALATIN	OR	97062
22980 SW ERIO PL	TUALATIN	OR	97062
8560 SW MARICOPA DR	TUALATIN	OR	97062
22580 SW MIAMI DR	TUALATIN	OR	97062
22675 SW MIAMI DR	TUALATIN	OR	97062

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GRENZ CAITLIN & GRENZ MACKENZIE
 GRIFFITH DWIGHT A & GRIFFITH H KAY
 GRIFFITH NOEL T JR & GRIFFITH ANGELA R
 GUERRA FILEMON M JR & QUIRANTE MALINDA
 GUYETTE JONATHAN & GUYETTE REBECCA
 HACKENBRUCK JERRY ALDEN & LINDA JOAN REV TRUST
 HALL SCOTT & HALL BETH
 HALLVIK BRUCE D & HALLVIK PAMELA S
 HAMILTON GEORGE & ALICE TRUST
 HAMM STEVEN & HAMM SANDRA
 HANAWA IWAO & HANAWA LAURIE
 HARI B N K A RAMAKANTH & ERANKI VK RANJITHA
 HARVEY DWIGHT & HARVEY BONITA
 HASBROOK FAMILY TRUST
 HASLAM KENNETH A & HASLAM JESSICA J
 HAUBDINE PATRICK E & HAUBDINE DELEE H
 HEIRONIMUS JULIE A & VALLECK GEORGE D
 HELMS NICOLE E & HELMS ANDREW E
 HERRERA FERNANDO JR & HERRERA REBEKAH
 HERRERA FERNANDO & HERRERA MARIA D
 HEYER TRUST
 HILL DEREK & HILL CYNTHIA
 HINDERAKER DIXON RUIZ & BENSON LILLIAN PATRICE
 HINES MICHAEL A & HINES MARLENE R
 HODGE KENNETH M
 HOLDBROOK-DADSON DENISE
 HOOVER DAN M
 HORIZON COMMUNITY CHURCH
 HOWE WARREN & YUHAS-HOWE HEATHER
 HUALA ROBIN PATRICK
 HUMPHREY MARGIE LIV TRUST
 HUMPHREY SUSAN E
 HYRE TIMOTHY R & HYRE ANNILEE D
 INGRAM CLIFFORD KEITH & INGRAM ELISABETH JOY
 IRWIN AUSTIN SCOTT
 JACKSON MARY ELIZABETH
 JACOBS JEFFREY W
 JACOBS TYLER JOSEPH
 JASTRAM WILLIAM E & JASTRAM CHRISTINE A
 JENKINS PHILIP D & JENKINS KRISTEN K
 JOHNSON FLETCHER & JOHNSON CHRISTINA
 JONES CHARLES & JONES SHARON
 JORGENSEN HEATHER & JORGENSEN COLBIE
 KALATEH EBRAHIM SHIRDOOST & DOOST NOOSHIN NEZAM
 KARIS ALEXANDER DONALD
 KAUFFMAN FAMILY TRUST
 KEHDI ANDREW & MEMAN GOSHINA
 KENNEDY MICHAEL C & KENNEDY LINDA M
 KERN KEVIN
 KERNER ROBERT
 KHAN SOHAIL & FARZANA LIV TRUST
 KHAN SOHAIL & FARZANA LIV TRUST
 KIM KYU & KIM MELISSA
 KIM GUANDONG STEVE & KIM HAYKYONG MARIE
 KIMMEL RONALD A & KIMMEL REBECCA A
 KINNAMAN JEFFREY B & KINNAMAN JENNIFER D
 KIRK CHRISTINE A & HOFF JAMES A
 KIS JUAN ANTONIO & KIS CLAUDIA
 KLAUSS CYDNI M
 KLEPS MARK G & KLEPS LINDSAY K
 KLOSSNER ANDREW J
 KNOX FAMILY TRUST

22590 SW VERMILLION DR	TUALATIN	OR	97062
22905 SW VERMILLION DR	TUALATIN	OR	97062
8898 SW STONO DR	TUALATIN	OR	97062
8899 SW IOWA DR	TUALATIN	OR	97062
22673 SW 96TH DR	TUALATIN	OR	97062
22680 SW 96TH DR	TUALATIN	OR	97062
9065 SW STONO DR	TUALATIN	OR	97062
22640 SW ENO PL	TUALATIN	OR	97062
22740 SW 87TH PL	TUALATIN	OR	97062
22725 SW VERMILLION DR	TUALATIN	OR	97062
3528 CHEROKEE CT	WEST LINN	OR	97068
23120 SW DARBY AVE	TUALATIN	OR	97062
9315 SW IOWA DR	TUALATIN	OR	97062
22790 SW MIAMI DR	TUALATIN	OR	97062
22825 SW ERIO PL	TUALATIN	OR	97062
9215 SW STONO DR	TUALATIN	OR	97062
22710 SW 90TH PL	TUALATIN	OR	97062
709 W 36TH ST	VANCOUVER	WA	98660
9260 SW SKOKOMISH LN	TUALATIN	OR	97062
9360 SW STONO DR	TUALATIN	OR	97062
22775 SW VERMILLION DR	TUALATIN	OR	97062
9600 SW IOWA DR	TUALATIN	OR	97062
8910 SW TUTELO LN	TUALATIN	OR	97062
9730 SW IOWA DR	TUALATIN	OR	97062
9235 SW STONO DR	TUALATIN	OR	97062
9330 SW SKOKOMISH LN	TUALATIN	OR	97062
8993 SW STONO DR	TUALATIN	OR	97062
PO BOX 2690	TUALATIN	OR	97062
9495 SW NORWOOD RD	TUALATIN	OR	97062
14607 NE 57TH ST	BELLEVUE	WA	98007
22820 SW 92ND PL	TUALATIN	OR	97062
8801 SW STONO DR	TUALATIN	OR	97062
22840 SW VERMILLION DR	TUALATIN	OR	97062
22785 SW 87TH PL	TUALATIN	OR	97062
8790 SW MOHEGAN LN	TUALATIN	OR	97062
8850 SW MOHEGAN LN	TUALATIN	OR	97062
9360 SW PALOUSE LN	TUALATIN	OR	97062
8725 SW MOHEGAN LN	TUALATIN	OR	97062
9015 SW IOWA DR	TUALATIN	OR	97062
9240 SW STONO DR	TUALATIN	OR	97062
9365 SW STONO DR	TUALATIN	OR	97062
23169 SW 89TH AVE	TUALATIN	OR	97062
9375 SW STONO DR	TUALATIN	OR	97062
22585 SW 87TH PL	TUALATIN	OR	97062
22930 SW MANDAN DR	TUALATIN	OR	97062
22725 SW MIAMI DR	TUALATIN	OR	97062
23125 SW 89TH AVE	TUALATIN	OR	97062
22735 SW 87TH PL	TUALATIN	OR	97062
9450 SW IOWA DR	TUALATIN	OR	97062
8850 SW STONO DR	TUALATIN	OR	97062
2919 BEACON HILL DR	WEST LINN	OR	97068
2919 BEACON HILL DR	WEST LINN	OR	97068
22589 SW 96TH DR	TUALATIN	OR	97062
23030 SW VERMILLION DR	TUALATIN	OR	97062
23605 SW BOONES FERRY RD	TUALATIN	OR	97062
8780 SW STONO DR	TUALATIN	OR	97062
22611 SW 96TH DR	TUALATIN	OR	97062
22615 SW 93RD TER	TUALATIN	OR	97062
22635 SW 87TH PL	TUALATIN	OR	97062
9675 SW IOWA DR	TUALATIN	OR	97062
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22950 SW MIAMI PL	TUALATIN	OR	97062

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LNR3 AIV LLC
 LNR3 AIV LLC
 LNR3 AIV LLC
 LNR3 AIV LLC
 LNR3 AIV LLC
 LNR3 AIV LLC
 LNR3 AIV LLC
 LOEN EMILY G
 LORENZEN TYLER J & LORENZEN TATJANA
 LOVELACE LIVING TRUST
 LUCINI JOHN W & GRACE N FAM TRUST
 MACCLANATHAN MELANIE & MACCLANATHAN MICHAEL
 MACDONALD BRIAN & MACDONALD AMELIA
 MADONDO JEFFRET & JOHNSON MORGAN IRENE
 MAIER DARLA & MAIER THOMAS
 MALONSON FAMILY REV LIV TRUST
 MARBLE AMANDA L TRUST
 MARK HENRY & MARK CHRISTINE
 MARLEAU ALLISON P
 MARTIN FAMILY TRUST
 MAST MARVIN R & JELI CARLENE M
 MCALLISTER DENNIS C & MCALLISTER RAGNHILD
 MCARTHUR MARANDA LEE & VANDORNE CASE DENNISON
 MCCALEB KEVIN L
 MCCLAFFERTY STACY HEATHER & MCCLAFFERTY JOSHUA MICHAEL
 MCDONOUGH JOHN MICHAEL & MCDONOUGH MAUREEN CLARE
 MCGILCHRIST STEPHEN R & NYSTROM-GERDES ELIZABETH R
 MCKEAN AMY & MCKEAN RAYMOND
 MCLAUGHLIN NATHANIEL ANDREW & MCLAUGHLIN AREENA DEVI
 MCMANUS HEIDI
 MCREYNOLDS CHRIS & MCREYNOLDS AUDREY
 MELE SEAN K & ASKEW DANIELLE J
 MENES MARK A
 MIAO XIANGLONG & LONG ZI
 MICHAEL SCOTT CURTIS & MICHAEL TINA FRANCINE
 MICHELS ELIZABETH A
 MIKULA KATERINA
 MILLER CAROLE D LIV TRUST
 MILLER JOHN LESLIE & PLATTEAU ASTRID S
 MILLER ROBERT F LIV TRUST
 MILSTED MAURICE SCOTT & STOVER-MILSTED SUSAN LEE
 MIZE JOSHUA & MIZE CHRISTINE
 MOEN DEBORAH & MOEN ERIK
 MOLLER THERESA
 MOORE DAVID C & MOORE TAMMY
 MORELAND GREG E
 MORRIS LARRY L & MORRIS JUANITA
 MOSHOFSKY JOHN & MOSHOFSKY GINGER
 MOYES DUSTIN R
 MUELLER FAMILY TRUST
 MULGAONKER SHAILESH S
 MURPHY MICHAEL F & OLSON-MURPHY ANTONETTE K
 MUSIAL LUKE & MUNSEY VICTORIA
 NATWICK AARON D & KARI L REV TRUST
 NEARY TIMOTHY & NEARY LUCY
 NEILL RACHEL & HUSUM BRENT
 NELL ZACHARY D & NELL KENDRA
 NELSON KIRIN H
 NEULEIB TAMI R
 NEWBERRY GARY B & THOMPSON DONNA L
 NEWTON KYLE C & NEWTON HAILEY R
 NGUYEN QUOC & NGUYEN DIANE

11807 NE 99TH AVE STE 1170	VANCOUVER	WA	98682
11807 NE 99TH AVE STE 1170	VANCOUVER	WA	98682
11807 NE 99TH AVE STE 1170	VANCOUVER	WA	98682
11807 NE 99TH AVE STE 1170	VANCOUVER	WA	98682
11807 NE 99TH AVE STE 1170	VANCOUVER	WA	98682
11807 NE 99TH AVE STE 1170	VANCOUVER	WA	98682
11807 NE 99TH AVE STE 1170	VANCOUVER	WA	98682
22655 SW ENO PL	TUALATIN	OR	97062
22820 SW MIAMI DR	TUALATIN	OR	97062
22659 SW 96TH DR	TUALATIN	OR	97062
23677 SW BOONES FERRY RD	TUALATIN	OR	97062
22575 SW 94TH TER	TUALATIN	OR	97062
22640 SW MIAMI DR	TUALATIN	OR	97062
22795 SW 94TH TER	TUALATIN	OR	97062
9340 SW PALOUSE LN	TUALATIN	OR	97062
22955 SW VERMILLION DR	TUALATIN	OR	97062
8989 SW STONO DR	TUALATIN	OR	97062
22725 SW 90TH PL	TUALATIN	OR	97062
22615 SW VERMILLION DR	TUALATIN	OR	97062
8986 SW STONO DR	TUALATIN	OR	97062
23845 SW BOONES FERRY RD	TUALATIN	OR	97062
8805 SW STONO DR	TUALATIN	OR	97062
23219 SW DARBY AVE	TUALATIN	OR	97062
8950 SW IOWA DR	TUALATIN	OR	97062
22800 SW 89TH PL	TUALATIN	OR	97062
8750 SW STONO DR	TUALATIN	OR	97062
22720 SW 93RD TER	TUALATIN	OR	97062
22685 SW VERMILLION DR	TUALATIN	OR	97062
8960 SW IOWA DR	TUALATIN	OR	97062
22820 SW 90TH PL	TUALATIN	OR	97062
22720 SW 87TH PL	TUALATIN	OR	97062
8730 SW MOHEGAN LN	TUALATIN	OR	97062
9280 SW STONO DR	TUALATIN	OR	97062
5377 SE VERBENA PL	HILLSBORO	OR	97123
8580 SW MARICOPA DR	TUALATIN	OR	97062
22590 SW 93RD TER	TUALATIN	OR	97062
9330 SW PALOUSE LN	TUALATIN	OR	97062
8834 SW STONO DR	TUALATIN	OR	97062
22730 SW ENO PL	TUALATIN	OR	97062
22631 SW 96TH DR	TUALATIN	OR	97062
22875 SW MIAMI DR	TUALATIN	OR	97062
22920 SW ENO PL	TUALATIN	OR	97062
22572 SW 96TH DR	TUALATIN	OR	97062
22825 SW 93RD TER	TUALATIN	OR	97062
8990 SW STONO DR	TUALATIN	OR	97062
753 KOTZY AVE S	SALEM	OR	97302
22745 SW ENO PL	TUALATIN	OR	97062
9310 SW SKOKOMISH LN	TUALATIN	OR	97062
8765 SW STONO DR	TUALATIN	OR	97062
22660 SW 93RD TER	TUALATIN	OR	97062
PO BOX 367	TUALATIN	OR	97062
8870 SW IOWA DR	TUALATIN	OR	97062
22825 SW 94TH TER	TUALATIN	OR	97062
9580 SW IOWA DR	TUALATIN	OR	97062
22780 SW 92ND PL	TUALATIN	OR	97062
9350 SW STONO DR	TUALATIN	OR	97062
8842 SW STONO DR	TUALATIN	OR	97062
8826 SW STONO DR	TUALATIN	OR	97062
9395 SW SKOKOMISH LN	TUALATIN	OR	97062
9295 SW IOWA DR	TUALATIN	OR	97062
8814 SW STONO DR	TUALATIN	OR	97062
9660 SW IOWA DR	TUALATIN	OR	97062

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NORD KYLE THOMAS & NORD CHRISTINE
 NORTH DAVID P & NORTH BARBARA
 NORWOOD HEIGHTS OWNERS OF LOTS 11 13-24
 NORWOOD HEIGHTS OWNERS OF LOTS 30 32-42
 NORWOOD HORIZON HOLDINGS LLC
 NOYES PATRICK A & THOMPSON CAMILLIA M
 OLIVERA APOLINAR & OLIVERA DEBBIE & WHITWORTH DAVID ET AL
 O'NEAL DANNY F & O'NEAL JONI L
 OSTROWSKI MICHAEL J & OSTROWSKI SHERIE M
 OWENS CLINTON MICHAEL SHOOK
 PARKER ETHAN T & PARKER JAMIE L
 PAROSA JOSHUA DAVID
 PATTON ANDREW M & PATTON LINDSEY M
 PEBBLES CRAIG M & PEBBLES TANYA A
 PENA ZACHARY G & PENA TIFFANY R
 PETRIDES PHILLIP LIV TRUST
 PFEIFER STEPHANIE B
 PICKETT R DEAN & PICKETT E RAYLEA
 PIERCE KELLY JOANNE & PIERCE BRIAN LAWRENCE
 PIERCE LAURA ANNE
 PIRTLE JAMES L JR & PIRTLE LINDA L
 PITT CHARLES R
 POLVERINI JESSICA D & POLVERINI TREVOR M
 POTTER DYLAN D & POTTER MICHELLE P
 POTTLE KEITH W & POTTLE DARCY A
 POURSAFAR AMIRHOSSEIN & KOMESHI MAHYA
 POWELL MATTHEW & POWELL LAUREN
 PR 8945 SW IOWA LLC
 PROCTER JASON TOBIAS & PROCTER KYLI CHRISTINE
 QIAN LIDONG & YANG YUYUAN
 QIAN JUN
 RAMIREZ JOSE ANTONIO & RAMIREZ SILVIA
 RAMKU DAVID
 RAMKU FAMILY TRUST
 RANSOM ANNIE M
 RAY CYNTHIA P
 RAZ DOUGLAS JOHN
 REICHLE ZACHARY
 REPCAK ROMAN & PARK-REPCAK ROBIN
 REYNOLDS GLENN A & REYNOLDS NANCY J
 REYNOLDS KIRK & REYNOLDS CORINNE
 RICHARDS MARK R & RICHARDS JILL E
 RICHTER FAMILY JOINT TRUST
 RILEY SHAWN O
 ROBERTS CHRISTOPHER T & ROBERTS KELLY J
 RODONDI TAUTALAMOTO ARIANA & TOGIAI-RODONDI TAMMY EASTER & RODONDI ATHONY SCO
 ROGERS JOHN & AGUILAR-NELSON LIZI
 ROMINE CLAUDIA
 RONALD TY & RONALD JENNIFER
 ROSE THEODORE & ROSE SHANNON
 SABIDO ROBERT & SABIDO JENNIFER M
 SANDSTROM GLENN M
 SAWAI STUART T & SAWAI MARY JANE
 SAYLOR ERIC M & SAYLOR BRITTA M
 SCHAFROTH J F & SCHAFROTH KATE R
 SCHOTT DAVID M & SCHOTT COURTNEY A
 SCHREIBER FAMILY TRUST
 SCHULTZ LARRY & JOANN REV LIV TRUST
 SCHWEITZ ERIC J & SCHWEITZ KAREN M
 SCOTT JERRY MICHAEL & STAMBAUGH DEBRA R
 SCRUGGS ERIC & SCRUGGS LAUREN
 SEDLER STEPHEN J & SEDLER JULIE A

9315 SW PALOUSE LN	TUALATIN	OR	97062
8818 SW STONO DR	TUALATIN	OR	97062
		OR	00000
		OR	00000
16998 GREENTREE AVE	LAKE OSWEGO	OR	97034
22810 SW 92ND PL	TUALATIN	OR	97062
22640 SW VERMILLION DR	TUALATIN	OR	97062
22625 SW 94TH TER	TUALATIN	OR	97062
9370 SW STONO DR	TUALATIN	OR	97062
9965 SW LUMBEE LN	TUALATIN	OR	97062
22855 SW ENO PL	TUALATIN	OR	97062
9360 SW IOWA DR	TUALATIN	OR	97062
9270 SW STONO DR	TUALATIN	OR	97062
22840 SW 90TH PL	TUALATIN	OR	97062
22865 SW ENO PL	TUALATIN	OR	97062
22815 SW MIAMI DR	TUALATIN	OR	97062
22530 SW 93RD TER	TUALATIN	OR	97062
22995 SW ERIO PL	TUALATIN	OR	97062
8675 SW STONO DR	TUALATIN	OR	97062
23216 SW DARBY AVE	TUALATIN	OR	97062
22780 SW 93RD TER	TUALATIN	OR	97062
8883 SW IOWA DR	TUALATIN	OR	97062
23050 SW VERMILLION DR	TUALATIN	OR	97062
23405 SW BOONES FERRY RD	TUALATIN	OR	97062
PO BOX 1996	TUALATIN	OR	97062
22850 SW 93RD TER	TUALATIN	OR	97062
22835 SW ENO PL	TUALATIN	OR	97062
8945 SW IOWA DR	TUALATIN	OR	97062
23147 SW 89TH AVE	TUALATIN	OR	97062
8815 SW STONO DR	TUALATIN	OR	97062
8775 SW MOHEGAN LN	TUALATIN	OR	97062
22560 SW 94TH TER	TUALATIN	OR	97062
14193 NW MEADOWRIDGE DR	PORTLAND	OR	97229
14193 NW MEADOWRIDGE DR	PORTLAND	OR	97229
22785 SW MIAMI DR	TUALATIN	OR	97062
8878 SW STONO DR	TUALATIN	OR	97062
22685 SW 94TH TER	TUALATIN	OR	97062
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22865 SW 93RD TER	TUALATIN	OR	97062
22600 SW 93RD TER	TUALATIN	OR	97062
22980 SW VERMILLION	TUALATIN	OR	97062
8870 SW STONO DR	TUALATIN	OR	97062
22765 SW MIAMI DR	TUALATIN	OR	97062
9760 SW IOWA DR	TUALATIN	OR	97062
9405 SW PALOUSE LN	TUALATIN	OR	97062
8891 SW IOWA DR	TUALATIN	OR	97062
22835 SW 90TH PL	TUALATIN	OR	97062
8838 SW STONO DR	TUALATIN	OR	97062
22690 SW VERMILLION DR	TUALATIN	OR	97062
22885 SW ERIO PL	TUALATIN	OR	97062
8890 SW IOWA DR	TUALATIN	OR	97062
9390 SW SKOKOMISH LN	TUALATIN	OR	97062
9080 SW IOWA DR	TUALATIN	OR	97062
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8770 SW MOHEGAN LN	TUALATIN	OR	97062

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SEKI KATSUMICHI & SEKI MIYUKI
 SEPP JULIE & SEPP ROBERT
 SHAMBURG SCOTT A
 SHAVLOVSKIY FAMILY REV LIV TRUST
 SHAVLOVSKIY VITALIY & SHAVLOVSKIY NATALIA
 SHEARER THOMAS M & CHERIE M SHEARER FAMILY TRUST
 SHEETZ DONALD K & MARY M SHEETZ REV LIV TRUST
 SHIMADA HIROSHI & SHIMADA ANGELIQUE
 SHIPLEY HEATHER
 SHOBAKEN THOMAS R
 SHULL COREY & BAN YUNCHAO
 SIMMONS LINDA C TRUST
 SIROIS TYSON & JARRARD LINDSEY
 SMITH DANA LYNN
 SMITH WILLIAM R & SMITH BARBARA J
 SMITH GREGORY D & LINDA S REV TRUST
 SMITH MELISSA & SMITH ORLONDO
 SNODDY ROBERT B
 SOMERTON RITA G & SOMERTON MARVIN
 SPENCER EVERETT & SPENCER LORRIE HEAPE
 ST CLAIR DEBORAH J LIVING TRUST
 STACKLIE TIM & KAREN LIV TRUST
 STILLS DANNY T & STILLS DEBRA J
 STIMSON FAMILY TRUST
 STONE LEAH
 STONE BRIDGE HOMES NW LLC
 STONE BRIDGE HOMES NW LLC
 STONE BRIDGE HOMES NW LLC
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 STONE BRIDGE HOMES NW LLC
 STONE BRIDGE HOMES NW LLC
 STRATTON GILLIAN M LIVING TRUST
 STUART JAMES W & STUART HOLLY V
 SUTHERLAND STUART P & SUTHERLAND LEEANN N FAM TRUST
 SYVERSON FAMILY LIV TRUST

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TAKALLOU MOJTABA B & AMINI AFSANEH
 TAM AARON L M & TAM AMY
 TAM FONG
 TAPASA HEIDI L & TAPASA TUUMAMAO
 TAYLOR FLORDELIZA J
 TAYLOR BRENDA & TAYLOR JOE N
 TAYLOR ARTHUR R & MANANDIL MYLYN
 THOM HOUSTON TYLER & JACOBS TINA MARIE
 THOMAS FAMILY TRUST
 THOMPSON JOYCE TRUST
 THURLEY CHRISTOPHER
 TIGARD-TUALATIN SCHOOL DISTRICT #23J
 TILSON CHRISTINA & TILSON ERIC
 TINDAL HAROLD MARK & TINDAL EMILY KATHLEEN
 TOJONG EDWARD & TOJONG MARISSA
 TOLER E TRENT & TOLER ROSEANN T
 TOMPKINS TIMOTHY L & TOMPKINS RACHEL N
 TRAN NICHOLAS & HO BECKY NGOC
 TRICKETT AARON & TRICKETT HEATHER
 TRIKUR MARTA LUIZA & TRIKUR SERGEY F
 TROTMAN NEIL
 TROYER KENNETH A & VALERIE LEE REV LIV TRUST
 TUALATIN CITY OF DEVELOPMENT COMMISSION
 TUALATIN CITY OF DEVELOPMENT COMMISSION
 TUALATIN CITY OF DEVELOPMENT COMMISSION
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 TUALATIN CITY OF
 TUCKER KENDALL J & PATEL AVNI J
 TURNBULL BRENT D
 TURNBULL BRENT
 TURNER BENJAMIN & PERKINS EMILY A
 VANDERBURG SUSAN B & VANDERBURG JOHN TIMOTHY REV TRUST & VANDERBURG JACQUELIN
 VELAZQUEZ BRIAN A & VELAZQUEZ CHRISTINA RALSTON
 VICTORIA WOODS OWNERS COMMITTEE
 VICTORIA WOODS OWNERS COMMITTEE
 VICTORIA WOODS OWNERS COMMITTEE
 VICTORIA MEADOWS HOA
 VICTORIA MEADOWS HOA
 VICTORIA MEADOWS HOA
 VUKANOVICH MARK
 WADSWORTH ERIC & WADSWORTH WENDY
 WEGENER RODNEY R
 WEIGEL ROBERT
 WELBORN RANDALL J & JULIE ANN WELBORN LIV TRUST
 WELCH RAYMOND P & WELCH PAMELA K
 WHEELER MARK TIMOTHY & WHEELER YIN TUN
 WHEELER TERRANCE J & WHEELER LINDA K

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2S135AC05900
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WHITE RYAN K & WHITE BRENN A R
WHITT JASON & WHITT MELANIE
WILLIAMS MEGANN E & WILLIAMS AUSTIN J
WILSON DAVID L & WILSON KAREN A
WISE ROBERT C & WISE SUSAN M
WISER BRIAN R & LIRA MARIA ALEJANDRA
WISER THOMAS WAYNE & WISER DIANE MARIE
WONG JONATHAN D & WONG BETH J
WOODRUFF VIRGINIA C
WOOLSEY RANDY M & WOOLSEY DONNA J
WORKMAN STEPHEN G & WORKMAN MARY B
YARNELL REV LIV TRUST
YEE DONALD M & YEE PAMELA E
YOUNG REV TRUST
ZACHER BRIAN M

WESTLAKE CONSULTANTS, INC. ATTN: KEN SANDBLAST


KEN ALLEN

HORIZON COMMUNITY CHURCH ATTN: RANDY CABBELL

22930 SW ERIO PL	TUALATIN	OR	97062
9745 SW IOWA DR	TUALATIN	OR	97062
8830 SW STONO DR	TUALATIN	OR	97062
22750 SW 92ND PL	TUALATIN	OR	97062
9875 SW LUMBEE LN	TUALATIN	OR	97062
22845 SW 89TH PL	TUALATIN	OR	97062
22750 SW MIAMI DR	TUALATIN	OR	97062
9345 SW STONO DR	TUALATIN	OR	97062
22740 SW 93RD TER	TUALATIN	OR	97062
8775 SW STONO DR	TUALATIN	OR	97062
8810 SW STONO DR	TUALATIN	OR	97062
22620 SW 87TH PL	TUALATIN	OR	97062
9105 SW STONO DR	TUALATIN	OR	97062
987 SOLANA CT	MOUNTAIN VIEW	CA	94040
9325 SW QUINAULT LN	TUALATIN	OR	97062
15115 SW SEQUOIA PARKWAY SUITE 150	TIGARD	OR	97224
23370 SW BOONES FERRY ROAD	TUALATIN	OR	97062
23370 SW BOONES FERRY ROAD	TUALATIN	OR	97062

Madeleine Nelson

From: DLCD Plan Amendments <plan.amendments@dlcd.oregon.gov>
Sent: Wednesday, October 9, 2024 11:51 AM
To: Madeleine Nelson
Subject: Confirmation of PAPA Online submittal to DLCD

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Tualatin

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Local File #: PMA 24-0004

DLCD File #: [005-24](#)

Proposal Received: 10/9/2024

First Evidentiary Hearing: 12/9/2024

Submitted by: mnelson

If you have any questions about this notice, please reply or send an email to plan.amendments@dlcd.oregon.gov.

City of Tualatin

Housing Needs Analysis

December 2019

Prepared for:

City of Tualatin

FINAL REPORT

ECONorthwest
ECONOMICS • FINANCE • PLANNING

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Executive Summary

Planning Goal 10 and OAR 660-008. The methods used for this study generally follow the *Planning for Residential Growth* guidebook, published by the Oregon Transportation and Growth Management Program (1996).

The primary goals of the housing needs analysis were to (1) project the amount of land needed to accommodate the future housing needs of all types within the Tualatin Planning Area, (2) evaluate the existing residential land supply within the Tualatin Planning Area to determine if it is adequate to meet that need, (3) to fulfill state planning requirements for a twenty-year supply of residential land, and (4) identify policy and programmatic options for the City to meet identified housing needs.

What are the key housing needs in Tualatin?

Following are several key issues identified in the housing needs analysis:

- **Tualatin’s housing market is strongly impacted by the regional market in the Portland Region.** Tualatin is relatively small, accounting for 4.5% of Washington County’s population and 1.5% of the Portland Region’s population. Of the more than 23,800 people who work in Tualatin, 93% of workers commute into Tualatin from other areas, most notably Portland, Tigard, Beaverton, and Hillsboro. Nearly 11,000 residents of Tualatin commute out of the city for work, many of them to Portland.
- **Household incomes in Tualatin are similar to Washington County’s, and have not kept pace with housing prices.** Tualatin’s home sales and rental costs are comparable to other communities in the region. Tualatin has a larger share of multifamily housing compared to Washington County and the Portland Region (42% the City’s housing stock), and there are very few vacant units. Given these factors, Tualatin will continue to have demand for affordable, lower-income and middle-income housing.
- **Demographic and economic trends will drive demand for relatively affordable attached single-family housing and multifamily housing in Tualatin.** The key demographic trends that will affect Tualatin’s future housing needs are: (1) the aging of the Baby Boomers, (2) aging of the Millennials, and (3) continued growth in the Latinx population.
 - As the Baby Boomers age, growth of retirees will drive demand for housing types specific to seniors, such as small and easy-to-maintain dwellings, assisted living facilities, or age-restricted developments.
 - Tualatin’s ability to retain Millennials will depend on whether the city has opportunities for housing that both appeals to and is affordable to Millennials.
 - Growth in the number of Latinx households will result in increased demand for housing of all types, both for ownership and rentals, with an emphasis on

housing that is comparatively affordable. Latinx households are more likely to be larger than average, with more children and possibly with multigenerational households.

- **Tualatin has an existing lack of affordable housing.** Tualatin’s key challenge over the next 20 years is providing opportunities for development of relatively affordable housing of all types of housing, from lower-cost single-family housing to market-rate multifamily housing.
 - About 26% of Tualatin’s households had incomes less than \$41,000 and cannot afford a two-bedroom apartment at Washington County’s Fair Market Rent (FMR) of \$1,330 without cost burdening themselves.
 - In 2018, a household needed to earn \$25.58 an hour to afford a two-bedroom rental unit in Washington County.
 - Tualatin currently has a deficit of housing units that are affordable to households earning less than \$35,000.
 - About 37% of Tualatin’s households are cost burdened, with 56% of renters and 22% of owners paying more than 30% of their income on housing.

How much growth is Tualatin planning for?

A 20-year household forecast (in this instance, 2020 to 2040) is the foundation for estimating the number of new dwelling units needed. Exhibit 1 shows a household forecast for Tualatin for the 2020 to 2040 period. It shows that Tualatin will grow by about 1,014 households over the 20-year period (with 44% of households projected to locate in Basalt Creek).

Exhibit 1. Forecast of Household Growth, Tualatin city limits, 2020 to 2040

Source: Metro 2040 Population Distributed Forecast, Exhibit A. July 12, 2016.

10,791	11,362	571	5.3% increase
Households in 2020	Households in 2040	New households 2020 to 2040	0.26% Growth Rate

Exhibit 2. Forecast of Household Growth, Basalt Creek, 2020 to 2040

Source: Metro 2040 TAZ Forecast, Population Estimates (TAZ 980 and 981). November 6, 2015.

203	646	443	218% increase
Households in 2020	Households in 2040	New households 2020 to 2040	5.96% Growth Rate

How much buildable residential land does Tualatin currently have?

Exhibit 3 shows buildable residential acres by Plan Designation, after excluding constrained and unbuildable land. The results show that Tualatin has about 244 net buildable acres in residential Plan Designations. Of the 244 net acres, about 62% are located in Basalt Creek.

Exhibit 3. Buildable acres in vacant and partially vacant tax lots by Plan Designation, Tualatin Planning Area, 2018

Source: Metro BLI, ECONorthwest Analysis. Note: The numbers in the table may not sum to the total as a result of rounding.

Generalized Plan Designation	Total buildable acres	Buildable acres on vacant lots	Buildable acres on partially vacant lots
Residential			
Low Density Residential	79	11	68
Medium Low Density Residential	1	0	1
Medium High Density Residential	1	1	0
High Density High Rise Residential	0	0	0
High Density Residential	12	12	0
Commercial			
Mixed-Use Commercial Overlay Zone	0	0	0
Central Tualatin Overlay Zone	0	0	0
Basalt Creek Planning Area			
Low Density Residential	76	2	74
Medium Low Density Residential	69	49	20
High Density Residential	5	0	5
Neighborhood Commercial	0	0	0
Total	244	75	168

Exhibit 3 shows that Tualatin has 150 buildable acres in the Basalt Creek Planning Area. To analyze housing capacity and land sufficiency, this report uses the Basalt Creek Concept Plan’s estimate of buildable acres (which is 88 buildable acres). The analysis uses the Basalt Creek Concept Plans estimate of buildable acres (rather than the buildable lands inventory estimate) to remain consistent with this recently adopted Concept Plan and the Comprehensive Plan amendment.

How much housing will Tualatin need?

Tualatin will need to plan for about 1,014 new dwelling units to accommodate forecasted household growth between 2020 and 2040. About 406 dwelling units will be single-family detached types (40%), 152 will be single-family attached (15%), and 456 will be multifamily (45%).

This mix represents a shift from the existing mix of housing, in which about 53% of the housing stock in the 2013-2017 period was single-family detached housing. The shift in mix is in response to the need for a broader range of housing types with a wider range of price points

than are currently available in Tualatin’s housing stock, including housing types such as duplexes, townhouses, triplexes, and quadplexes, and apartments / condominiums.

How much land will be required for housing?

Exhibit 4 shows that Tualatin’s 96 acres of buildable land in its city limits and 88 acres in Basalt Creek (per the Basalt Creek Concept Plan) has the capacity to accommodate 1,207 new dwelling units. While Tualatin’s forecast for demand is for 1,014 new dwelling units, Tualatin has a deficit of capacity for 109 dwelling units in the Median High Density Plan Designation and 101 dwelling units in the High Density High-Rise Plan Designation (over the 2020 to 2040 period). The following summarizes Tualatin’s land sufficiency results by Plan Designations:

- **Low Density:** Tualatin has a surplus of capacity for about 57 dwelling units, or 10 gross acres of land to accommodate growth.
- **Medium Low Density:** Tualatin has a surplus of capacity for about 315 dwelling units, or 27 gross acres of land to accommodate growth.
- **Medium High Density:** Tualatin has a deficit of capacity for about 109 dwelling units, or seven gross acres of land to accommodate growth.
- **High Density:** Tualatin has a surplus of capacity for about 31 dwelling units, or two gross acres of land to accommodate growth.
- **High Density High-Rise:** Tualatin has a deficit of capacity for about 101 dwelling units, or four gross acres of land to accommodate growth.

Exhibit 4. Comparison of capacity of existing residential land with demand for new dwelling units and land surplus or deficit, Tualatin City Limits and Basalt Creek, 2020 to 2040

Source: Buildable Lands Inventory; Calculations by ECONorthwest. Note: DU is dwelling unit.

Residential Plan Designations	Capacity (Dwelling Units)	Demand for New Housing	Remaining Capacity (Supply minus Demand)	Land Surplus or (Deficit) Gross Acres
Low Density	523	466	57	10
Medium Low Density	386	71	315	27
Medium High Density	13	122	(109)	(7)
High Density	285	254	31	2
High Density High-Rise	-	101	(101)	(4)

What are the Key Findings of the Housing Needs Analysis?

The key findings of the Tualatin's Housing Needs Analysis are that:

- **Tualatin is planning for 1,014 new dwelling units.** The growth of 1,014 households will result in demand for 1,014 new dwelling units over the 20-year planning period, averaging 51 new dwelling units annually.
- **Tualatin will plan for more single-family attached and multifamily dwelling units in the future to meet the City's housing needs.** Historically, about 53% of Tualatin's housing was single-family detached. While 40% of new housing in Tualatin is forecast to be single-family detached, the City will need to provide opportunities for development of new single-family attached (15% of new housing) and multifamily units (45% of new housing).
 - The factors driving the shift in types of housing needed in Tualatin include changes in demographics and decreases in housing affordability. The aging of the Baby Boomers and the household formation of the Millennials will drive demand for renter- and owner-occupied housing, such as single-family detached housing, townhouses, duplexes, triplexes, quadplexes, and apartments. Both groups may prefer housing in walkable neighborhoods, with access to services.
 - Tualatin's existing deficit of housing affordable for low- and high-income households indicates a need for a wider range of housing types, for renters and homeowners. About 37% of Tualatin's households are cost burdened (paying more than 30% of their income on housing), including a cost burden rate of 56% for renter households.
 - Without diversification of housing types, lack of affordability will continue to be a problem, possibly growing in the future if incomes continue to grow at a slower rate than housing costs. Under the current conditions, 307 of the forecasted new households will have incomes of \$40,700 (in 2018 dollars) or less. These households often cannot afford market-rate housing without government subsidy. More than 300 new households will have incomes between \$40,700 and \$97,680. These households will all need access to affordable housing, such as the housing types described above.
- **Tualatin has a small deficit of land for higher density single-family and multifamily housing.** Tualatin has a deficit of land for 109 dwelling units in the Medium High Density Plan Designation (about seven gross acres) and 101 units in the High Density High-Rise Plan Designation (about four gross acres).
- **Tualatin will need to meet the requirements of House Bill 2001.** The Legislature passed House Bill 2001 in the 2019 Legislative session. The bill requires cities within the Metro UGB to allow "middle" housing types in low-density residential zones. The bill defines middle housing types as: duplexes, triplexes, quadplexes, cottage clusters, and townhouses. To comply with House Bill 2001, Tualatin will need to:

- Allow cottage cluster as a housing type in the Residential Low Density zone. Tualatin may want to allow cottage cluster housing in the Medium-Low Density and Medium-High Density zones. Tualatin will also need to include development standards in the Tualatin Development Code.
- Allow duplexes, townhouses, and multifamily housing as a permitted use in the Residential Low Density zone.

Following is a summary of ECONorthwest’s recommendations to Tualatin based on the analysis and conclusions in this report. The *Tualatin Housing Strategy* memorandum presents the full list of recommendations for Tualatin.

- **Ensure an adequate supply of land that is available and serviceable.** Tualatin should evaluate opportunities to increase residential development densities by modifying the Development Code, such as increasing densities and height limits in higher density zones. Tualatin should identify opportunities to re-zone land, from lower density usage to higher density usage, to provide additional opportunities for multifamily housing development. Tualatin should plan for long-term development of housing in Tualatin through 2040 and beyond by working with Metro on upcoming Growth Management reports.
- **Encourage development of a wider variety of housing types.** Tualatin should allow duplexes, triplexes, quadplexes, cottage clusters, and townhouses in the Residential Low Density zone and allow cottage cluster housing in the Medium-Low Density and Medium-High Density zones (which already allow for the other housing types mentioned). These changes should be made in a way that makes the City’s zoning code compliant with House Bill 2001.
- **Support development and preservation of housing that is affordable for all households.** The City should develop policies to support development of housing affordable to people who live and work in Tualatin. The City should identify opportunities to leverage resources (including funding) from the Metro Bond to support development of housing affordable to households earning less than 60% of Median Family Income in Washington County (\$48,900 for a household size of four people). The City should develop policies to prevent and address homelessness, as well as to prevent and mitigate residential displacement resulting from redevelopment and increases in housing costs. These actions will require Tualatin to evaluate the adoption of a wide variety of housing policies such as creative financing opportunities for systems development charges, evaluating tax exemption programs, participating in a land bank, and other approaches to supporting development of housing affordable at all income levels.
- **Identify funding tools to support residential development.** The City should evaluate tools such as establishing a new Urban Renewal District and evaluate establishing a construction excise tax.
- **Identify redevelopment opportunities.** The City should identify districts within Tualatin with opportunities for redevelopment for both housing and employment

uses, as well as supporting redevelopment of underutilized commercial buildings for housing.

- **Ensure there are connections between planning for housing and other community planning.** Throughout the project, stakeholders emphasized the need to coordinate housing planning with economic development planning, transportation planning, and other community planning. Updates to the Tualatin Transportation System Plan should be coordinated with planning for housing growth. A key approach to accommodating new residential development is redevelopment that results in mixed-use districts, providing opportunities for more housing affordable to people working at businesses in Tualatin and living closer to work (thus reducing transportation issues). In addition, stakeholders would like to see the incorporation of services needed to meet daily needs of residents of neighborhoods without driving.

The *Tualatin Housing Strategy* memorandum presents more details about each of these topics and recommendations for specific actions to implement these recommendations.

1. Introduction

This report presents Tualatin's Housing Needs Analysis for the 2020 to 2040 period. It is intended to comply with statewide planning policies that govern planning for housing and residential development, including Goal 10 (Housing) and OAR 660 Division 8. The methods used for this study generally follow the *Planning for Residential Growth* guidebook, published by the Oregon Transportation and Growth Management Program (1996).

Tualatin has changed considerably in the last two decades. Tualatin grew from 22,791 people in 2000 to 27,135 people in the 2013-2017 period. This is an addition of 4,344 people, or 19% growth. In this time, rates of housing cost burden increased from 26% to 37%, with renter cost burdened rates increasing from 30% to 56%. Median gross rents increased by \$386 (from \$768 in 2000 to \$1,154 in 2013-2017) and median home values increased by \$83,168 (from \$282,532 in 2000 to \$365,700 in 2013-2017).

This report provides Tualatin with a factual basis to update the Housing Element of the City's Comprehensive Plan and Development Code, and to support future planning efforts related to housing and options for addressing unmet housing needs in Tualatin. This report provides information that informs future planning efforts, including development and redevelopment. It provides the City with information about the housing market in Tualatin and describes the factors that will affect future housing demand in Tualatin, such as changing demographics. This analysis will help decision makers understand whether Tualatin has enough land to accommodate growth over the next 20 years.

Framework for a Housing Needs Analysis

Economists view housing as a bundle of services for which people are willing to pay: shelter certainly, but also proximity to other attractions (job, shopping, parks and recreation), amenities (type and quality of fixtures and appliances, landscaping, views), prestige, and access to a range of services (i.e. medical, transportation) including public services (i.e. quality of schools). Because it is impossible to maximize all these services and simultaneously minimize costs, households must, and do, make tradeoffs. What they can get for their money is influenced both by economic forces and government policy. Moreover, different households will value what they can get differently. They will have different preferences, which in turn are a function of many factors like income, age of head of household, number of people and children in the household, number of workers and job locations, number of transportation vehicles, and so on.

Thus, housing choices of individual households are influenced in complex ways by dozens of factors. The housing market in Washington County and Tualatin are the result of the individual decisions of thousands of households. These points help to underscore the complexity of projecting what types of housing will be built in Tualatin between 2020 and 2040.

The complex nature of the housing market, demonstrated by the unprecedented boom and bust during the past decade, does not eliminate the need for some type of forecast of future housing

demand and need. This includes resulting implications for land demand and consumption. Such forecasts are inherently uncertain. Their usefulness for public policy often derives more from the explanation of their underlying assumptions about the dynamics of markets and policies than from the specific estimates of future demand and need. Thus, we start our housing analysis with a framework for thinking about housing and residential markets, and how public policy affects those markets.

Statewide Planning Goal 10

The passage of the Oregon Land Use Planning Act of 1974 (ORS Chapter 197) established the Land Conservation and Development Commission (LCDC) and the Department of Land Conservation and Development (DLCD). The Act required the Commission to develop and adopt a set of statewide planning goals. Goal 10 addresses housing in Oregon and provides guidelines for local governments to follow in developing their local comprehensive land use plans and implementing policies.

At a minimum, local housing policies must meet the requirements of Goal 10 and the statutes and administrative rules that implement it (ORS 197.295 to 197.314, ORS 197.475 to 197.490, and OAR 600-008).¹ Goal 10 requires incorporated cities to complete an inventory of buildable residential lands. Goal 10 also requires cities to encourage the numbers of housing units in price and rent ranges commensurate with the financial capabilities of its households. Jurisdictions located in the Metro UGB are also required to comply with Metropolitan Housing in OAR 660-007 and Title 7 of Metro’s Urban Growth Management Functional Plan in the Metro Code (3.07 Title 7).

Goal 10 defines needed housing types as “all housing on land zoned for residential use or mixed residential and commercial use that is determined to meet the need shown for housing within an urban growth boundary at price ranges and rent levels that are affordable to households within the city with a variety of incomes, including but not limited to households with low incomes, very low incomes and extremely low incomes.” ORS 197.303 defines needed housing types:

- (a) Housing that includes, but is not limited to, attached and detached single-family housing and multiple family housing for both owner and renter occupancy.
- (b) Government assisted housing.²
- (c) Mobile home or manufactured dwelling parks as provided in ORS 197.475 to 197.490.
- (d) Manufactured homes on individual lots planned and zoned for single-family residential use that are in addition to lots within designated manufactured dwelling subdivisions.
- (e) Housing for farmworkers.

¹ ORS 197.296 only applies to cities with populations over 25,000.

² Government assisted housing can be any housing type listed in ORS 197.303 (a), (c), or (d).

DLCD provides guidance on conducting a housing needs analysis in the document *Planning for Residential Growth: A Workbook for Oregon's Urban Areas*, referred to as the Workbook.

Tualatin must identify needs for all of the housing types listed above as well as adopt policies that increase the likelihood that needed housing types will be developed. This housing needs analysis was developed to meet the requirements of Goal 10 and its implementing administrative rules and statutes.

The Metropolitan Housing Rule

OAR 660-007 (the Metropolitan Housing rule) is designed to “assure opportunity for the provision of adequate numbers of needed housing units and the efficient use of land within the Metropolitan Portland (Metro) urban growth boundary.” OAR 660-0070-005(12) provides a Metro-specific definition of needed housing:

"Needed Housing" defined. Until the beginning of the first periodic review of a local government's acknowledged comprehensive plan, "needed housing" means housing types determined to meet the need shown for housing within an urban growth boundary at particular price ranges and rent levels.

The Metropolitan Housing Rule also requires cities to develop residential plan designations:

(1) Plan designations that allow or require residential uses shall be assigned to all buildable land. Such designations may allow nonresidential uses as well as residential uses. Such designations may be considered to be "residential plan designations" for the purposes of this division. The plan designations assigned to buildable land shall be specific so as to accommodate the varying housing types and densities identified in OAR 660-007-0030 through 660-007-0037.

OAR 660-007 also specifies the mix and density of new residential construction for cities within the Metro Urban Growth Boundary (UGB):

“Provide the opportunity for at least 50 percent of new residential units to be attached single family housing or multiple family housing or justify an alternative percentage based on changing circumstances” (OAR 660-007-0030 (1)).

OAR 660-007-0035 sets specific density targets for cities in the Metro UGB. Tualatin’s average density target is eight dwelling units per net buildable acre.³

Metro Urban Growth Management Functional Plan

The Metro Urban Growth Management Functional Plan describes the policies that guide development for cities within the Metro UGB to implement the goals in the Metro 2040 Plan.

³ OAR 660-024-0010(6) defines Net Buildable Acres as follows: “Net Buildable Acre” consists of 43,560 square feet of residentially designated buildable land after excluding future rights-of-way for streets and roads.

Title 1: Housing Capacity

Title 1 of Metro's Urban Growth Management Functional Plan is intended to promote efficient land use within the Metro UGB by increasing the capacity to accommodate housing capacity. Each city is required to determine its housing capacity based on the minimum number of dwelling units allowed in each zoning district that allows residential development and maintain this capacity.

Title 1 requires that a city adopt minimum residential development density standards by March 2011. If the jurisdiction did not adopt a minimum density by March 2011, the jurisdiction must adopt a minimum density that is at least 80% of the maximum density.

Title 1 provides measures to decrease development capacity in selected areas by transferring the capacity to other areas of the community. This may be approved as long as the community's overall capacity is not reduced.

Metro's 2017 Compliance Report concludes that Tualatin is in compliance for the City's Title 1 responsibilities.

Title 7: Housing Choice

Title 7 of Metro's Urban Growth Management Functional Plan is designed to ensure the production of affordable housing in the Metro UGB. Each city and county within the Metro region is encouraged to voluntarily adopt an affordable housing production goal.

Each jurisdiction within the Metro region is required to ensure that their comprehensive plans and implementing ordinances include strategies to:

- Ensure the production of a diverse range of housing types,
- Maintain the existing supply of affordable housing, increase opportunities for new affordable housing dispersed throughout their boundaries, and
- Increase opportunities for households of all income levels to live in affordable housing (3.07.730)

Metro's 2017 Compliance Report concludes that Tualatin is in compliance for the City's Title 7 responsibilities.

Title 11: Planning for New Urban Areas

Title 11 of Metro's Urban Growth Management Functional Plan provides guidance on the conversion of land from rural to urban uses. Land brought into the Metro UGB is subject to the provisions of section 3.07.1130 of the Metro Code, which requires lands to be maintained at rural densities until the completion of a concept plan and annexation into the municipal boundary.

The concept plan requirements directly related to residential development are to prepare a plan that includes:

- (1) A mix and intensity of uses that make efficient use of public systems and facilities,
- (2) A range of housing for different types, tenure, and prices that addresses the housing needs of the governing city, and
- (3) Identify goals and strategies to meet the housing needs for the governing city in the expansion area.

Organization of this Report

The rest of this document is organized as follows:

- **Chapter 2. Residential Buildable Lands Inventory** presents the methodology and results of Tualatin’s inventory of residential land.
- **Chapter 3. Historical and Recent Development Trends** summarizes the state, regional, and local housing market trends affecting Tualatin’s housing market.
- **Chapter 4. Demographic and Other Factors Affecting Residential Development in Tualatin** presents factors that affect housing need in Tualatin, focusing on the key determinants of housing need: age, income, and household composition. This chapter also describes housing affordability in Tualatin relative to the larger region.
- **Chapter 5. Housing Need in Tualatin** presents the forecast for housing growth in Tualatin, describing housing need by density ranges and income levels.
- **Chapter 6. Residential Land Sufficiency within Tualatin** estimates Tualatin’s residential land sufficiency needed to accommodate expected growth over the planning period.

2. Residential Buildable Lands Inventory

This chapter provides a summary of the residential buildable lands inventory (BLI) for the Tualatin Planning Area. This buildable lands inventory analysis complies with statewide planning Goal 10 policies that govern planning for residential uses. The detailed methodology used to complete the buildable lands inventory is presented in Appendix A.

First, the analysis established the residential land base (parcels or portion of parcels with appropriate zoning), classified parcels by buildable status, identified/deducted environmental constraints, and lastly summarized total buildable area by Plan Designation.

Definitions

ECONorthwest developed the buildable lands inventory with a tax lot database from Metro Regional Land Information Systems (RLIS). Maps produced for the buildable lands inventory used a combination of GIS data based on the Metro BLI for the 2018 Urban Growth Report, adopted maps, and visual verification to verify the accuracy of Metro data. The tax lot database is current as of 2016, accounting for changes and development updates through April 2019. The inventory builds from the database to estimate buildable land per plan designations that allow residential uses. The following definitions were used to identify buildable land for inclusion in the inventory:

- *Vacant land.* Tax lots designated as vacant by Metro based on the following criteria: (1) fully vacant based on Metro aerial photo; (2) tax lots with less than 2,000 square feet developed and developed area is less than 10% of lot; (3) lots 95% or more vacant from GIS vacant land inventory.
- *Partially vacant land.* Single-family tax lots that are 2.5 times larger than the minimum lot size with a building value less than \$300,000, or lots that are 5 times larger than the minimum lots size (no threshold for building value). These lots are considered to still have residential capacity. For this analysis, we classified these lots as Partially Vacant, and we assumed that 0.25 acres of the lot was developed, and the remaining land is available for development, less constraints.
- *Public or exempt land.* Lands in public or semi-public ownership are considered unavailable for residential development. This includes lands in Federal, State, County, or City ownership as well as lands owned by churches and other semi-public organizations and properties with conservation easements. These lands are identified using the Metro's definitions and categories.
- *Developed land.* Lands not classified as vacant, partially vacant, or public/exempt are considered developed. Developed land includes lots with redevelopment capacity, which are also included in the BLI. The unit capacity of developed but redevelopable lots is based on Metro's estimates.

Development Constraints

Consistent with state guidance on buildable lands inventories, ECONorthwest deducted the following constraints from the buildable lands inventory and classified those portions of tax lots that fall within the following areas as constrained, unbuildable land:

- *Lands within floodplains.* Flood Insurance Rate Maps from the Federal Emergency Management Agency (FEMA) were used to identify lands in floodways and 100-year floodplains, as well as lands identified in Metro’s Title 3 Stream and Floodplain Protection Plan.
- *Land within natural resource protection areas.* The Locally Significant Wetlands shapefile was used to identify areas within wetlands. Riparian corridors and other natural resource areas identified in Tualatin’s Natural Resource Protection Overlay District were all considered undevelopable. These areas are consistent with the City’s Development Code Chapter 72.
- *Land with slopes over 25%.* Lands with slopes over 25% are considered unsuitable for residential development.

Buildable Lands Inventory Results

Land Base

Exhibit 5 shows residential land in Tualatin by classification (development status). The results show that the Tualatin Planning Area has 2,556 total acres in residential Plan Designations. (This includes the areas of the Mixed-Use Commercial Overlay Zone and Central Tualatin Overlay Zone that allow residential uses). Of these 2,556 acres, about 2,193 acres (86%) are classified as Developed or Public (or Exempt) and do not have development capacity, and the remaining 364 acres (14%) are Vacant or Partially Vacant and have development capacity (not including development constraints).⁴

⁴ The buildable lands inventory results in Exhibit 5 does not account for development constraints (yet). Land with development constraints are not classified as buildable; we remove development constraints in Exhibit 6 and we present final buildable land results in Exhibit 7.

Exhibit 5. Residential acres by classification and Plan Designation, Tualatin Planning Area, 2019

Source: Metro BLI, ECONorthwest Analysis. *Note: The numbers in the table may not sum to the total as a result of rounding.*

Generalized Plan Designation	Vacant	Partially Vacant	Developed	Public or Exempt	Total Acres	Percent of Total
Residential						
Low Density Residential	26	138	1,063	510	1,737	68%
Medium Low Density Residential	-	2	168	68	238	9%
Medium High Density Residential	1	-	125	31	158	6%
High Density High Rise Residential	-	-	6	9	15	1%
High Density Residential	15	-	117	21	153	6%
Commercial						
Mixed-Use Commercial Overlay Zone	-	-	25	-	25	1%
Central Tualatin Overlay Zone	3	-	29	6	37	1%
Basalt Creek Planning Area						
Low Density Residential	2	99	11	-	113	4%
Medium Low Density Residential	49	23	-	-	72	3%
High Density Residential	-	5	-	-	5	0%
Neighborhood Commercial	-	1	4	-	4	0%
Total	95	268	1,548	645	2,556	100%

Exhibit 6 shows land in all residential Plan Designations by development and constraint status. After development constraints have been applied, about 68% of Tualatin’s total residential land (1,747 acres) has no development capacity (i.e., committed), 22% (566 acres) is constrained, and 10% (244 acres) are unconstrained and buildable.

Exhibit 6. Residential land by comprehensive Plan Designation and constraint status, Tualatin Planning Area, 2019

Source: Metro BLI, ECONorthwest Analysis. *Note: The numbers in the table may not sum to the total as a result of rounding.*

Generalized Plan Designation	Total acres	Committed acres	Constrained acres	Buildable acres
Residential				
Low Density Residential	1,737	1,292	365	79
Medium Low Density Residential	238	190	47	1
Medium High Density Residential	158	128	29	1
High Density High Rise Residential	15	4	11	0
High Density Residential	153	77	64	12
Commercial				
Mixed-Use Commercial Overlay Zone	25	20	5	0
Central Tualatin Overlay Zone	37	16	21	0
Basalt Creek Planning Area				
Low Density Residential	113	13	23	76
Medium Low Density Residential	72	2	1	69
High Density Residential	5	0	0	5
Neighborhood Commercial	4	4	0	0
Total	2,556	1,747	566	244

Vacant Buildable Land

Exhibit 7 shows buildable acres (e.g., acres in tax lots after constraints are deducted) for vacant and partially vacant land by Plan Designation. Of Tualatin’s 244 unconstrained buildable residential acres, about 31% are in tax lots classified as vacant, and 69% are in tax lots classified as partially vacant. About 32% of Tualatin’s buildable residential land is in the Low Density Residential Plan Designation and about 62% of Tualatin’s buildable residential land is located in the Basalt Creek Planning Area.

Exhibit 7. Buildable acres in vacant and partially vacant tax lots by Plan Designation and zoning, Tualatin Planning Area, 2019

Source: Metro BLI, ECONorthwest Analysis. Note: The numbers in the table may not sum to the total as a result of rounding.

Generalized Plan Designation	Total buildable acres	Buildable acres on vacant lots	Buildable acres on partially vacant lots
Residential			
Low Density Residential	79	11	68
Medium Low Density Residential	1	0	1
Medium High Density Residential	1	1	0
High Density High Rise Residential	0	0	0
High Density Residential	12	12	0
Commercial			
Mixed-Use Commercial Overlay Zone	0	0	0
Central Tualatin Overlay Zone	0	0	0
Basalt Creek Planning Area			
Low Density Residential	76	2	74
Medium Low Density Residential	69	49	20
High Density Residential	5	0	5
Neighborhood Commercial	0	0	0
Total	244	75	168

Exhibit 8 and 5 (upcoming pages) show the results of Tualatin’s residential BLI.

Exhibit 8. Residential Land by Development Status with Constraints, Tualatin Planning Area, 2019

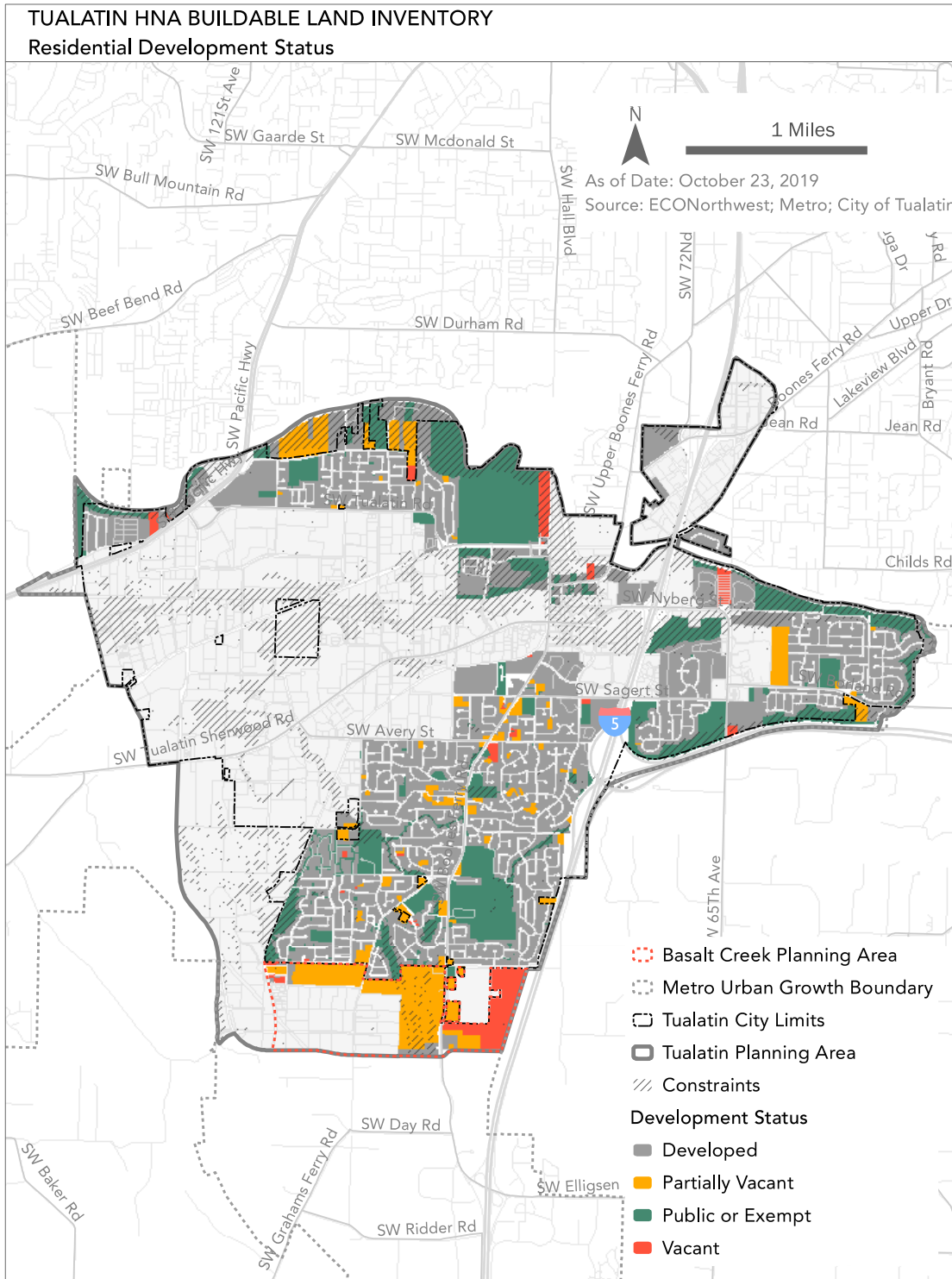
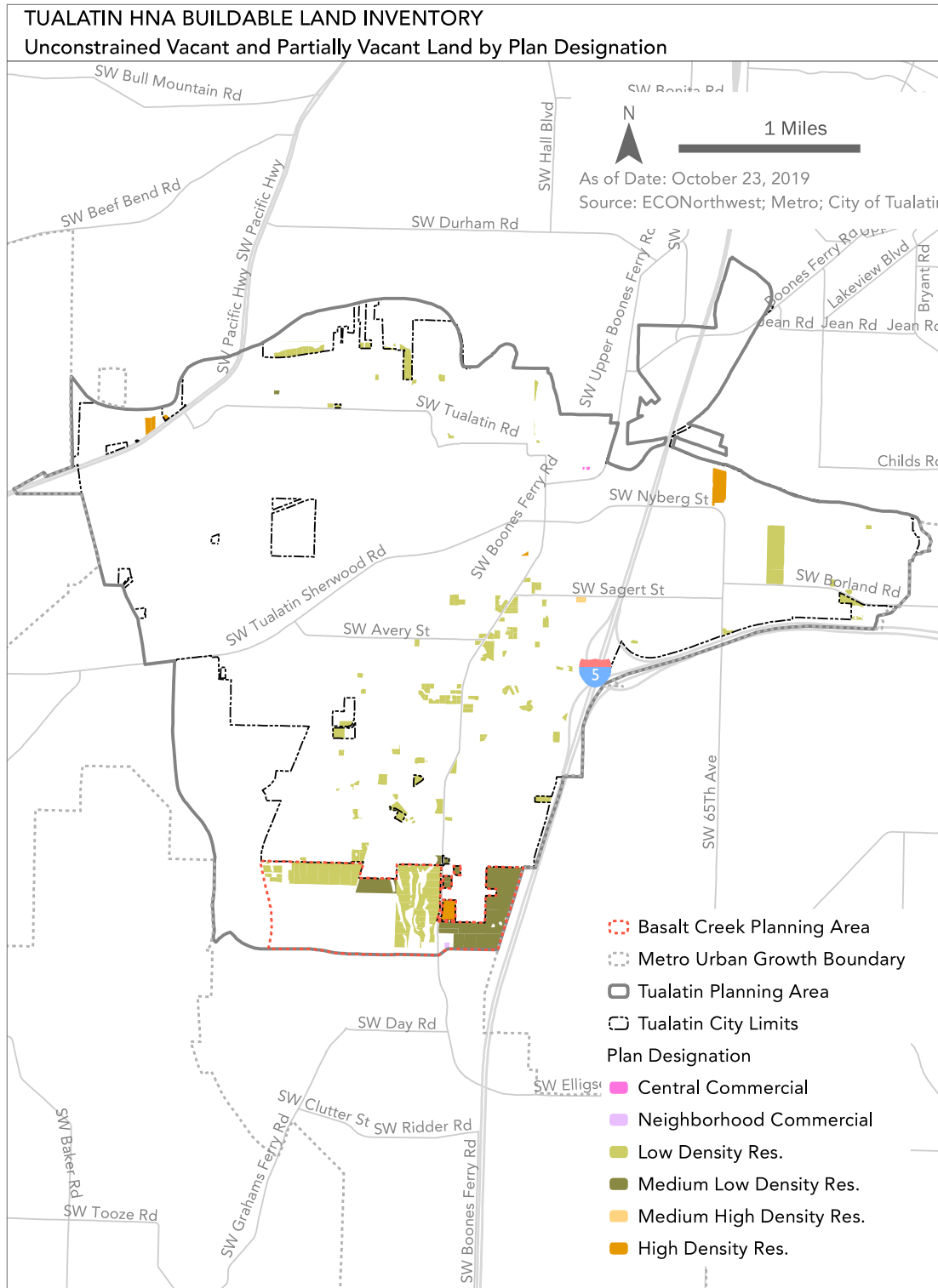


Exhibit 9. Unconstrained Vacant and Partially Vacant Residential Land, Tualatin Planning Area, 2019



3. Historical and Recent Development Trends

Analysis of historical development trends in Tualatin provides insight into the functioning of the local housing market. The mix of housing types and densities, in particular, are key variables in forecasting the capacity of residential land to accommodate new housing and to forecast future land need. The specific steps are described in Task 2 of the *DLCD Planning for Residential Lands Workbook* as:

1. Determine the time period for which the data will be analyzed.
2. Identify types of housing to address (all needed housing types).
3. Evaluate permit/subdivision data to calculate the actual mix, average actual gross density, and average actual net density of all housing types.

This Housing Needs Analysis examines changes in Tualatin's housing market from 2000 to 2017, as well as residential development from 2002 to 2017. We selected this time period because (1) the period provides information about Tualatin's housing market before and after the national housing market bubble's growth, deflation, and the more recent increase in housing costs and (2) data about Tualatin's housing market during this period is readily available from sources such as the Census and RLIS.

The Housing Needs Analysis presents information about residential development by housing type. There are multiple ways that housing types can be grouped. For example, they can be grouped by:

1. Structure type (e.g., single-family detached, apartments, etc.).
2. Tenure (e.g., distinguishing unit type by owner or renter units).
3. Housing affordability (e.g., subsidized housing or units affordable at given income levels).
4. Some combination of these categories.

For the purposes of this study, we grouped housing types based on: (1) whether the structure is stand-alone or attached to another structure and (2) the number of dwelling units in each structure. The housing types used in this analysis are consistent with needed housing types as defined in ORS 197.303:

- **Single-family detached** includes single-family detached units, manufactured homes on lots and in mobile home parks, and accessory dwelling units.
- **Single-family attached** is all structures with a common wall where each dwelling unit occupies a separate lot, such as row houses or townhouses.
- **Multifamily** is all attached structures (e.g., duplexes, triplexes, quadplexes, and structures with five or more units) other than single-family detached units, manufactured units, or single-family attached units.

In Tualatin, government-assisted housing (ORS 197.303(b)) and housing for farmworkers (ORS 197.303(e)) can be any of the housing types listed above.

Data Used in this Analysis

Throughout this analysis (including the subsequent Chapter 4), we used data from multiple sources, choosing data from well-recognized and reliable data sources. One of the key sources for housing and household data is the U.S. Census. This report primarily uses data from two Census sources, the Decennial and the American Community Survey:

- The **Decennial Census**, which is completed every ten years and is a survey of *all* households in the U.S. The Decennial Census is considered the best available data for information such as demographics (e.g., number of people, age distribution, or ethnic or racial composition), household characteristics (e.g., household size and composition), and housing occupancy characteristics. As of 2010, the Decennial Census does not collect more detailed household information, such as income, housing costs, housing characteristics, and other important household information. Decennial Census data is available for 2000 and 2010.
- The **American Community Survey (ACS)**, which is completed every year and is a *sample* of households in the U.S. From 2013 to 2017, the ACS sampled an average of 3.5 million households per year, or about 2.9% of the households in the nation. The ACS collects detailed information about households, including demographics (e.g., number of people, age distribution, ethnic or racial composition, country of origin, language spoken at home, and educational attainment), household characteristics (e.g., household size and composition), housing characteristics (e.g., type of housing unit, year unit built, or number of bedrooms), housing costs (e.g., rent, mortgage, utility, and insurance), housing value, income, and other characteristics.

This report uses data from the 2013-2017 ACS for Tualatin. Where information is available and relevant, we report information from the 2000 and 2010 Decennial Census. Among other data points, this report includes population, income, and housing price data from Redfin, the Bureau of Labor Services, and the United States Department of Housing and Urban Development. It uses the Oregon Department of Housing and Community Services affordable housing inventory and Oregon's Manufactured Dwelling Park inventory. It uses Metro's Regional Land Information System (RLIS) database, which provides tax lot data for jurisdictions within the three-county Metro Area (Clackamas County, Multnomah County, and Washington County).⁵

The foundation of the housing needs analysis is the population forecast for Tualatin from Metro's *2040 Household Distributed Forecast*.

⁵ We use RLIS tax lot data as a proxy for building permit data for Tualatin. The analysis period is 2000-2017, unless otherwise noted.

It is worth commenting on the methods used for the American Community Survey.⁶ The American Community Survey (ACS) is a national survey that uses continuous measurement methods. It uses a sample of about 3.54 million households to produce annually updated estimates for the same small areas (census tracts and block groups) formerly surveyed via the decennial census long-form sample. It is also important to keep in mind that all ACS data are estimates that are subject to sample variability. This variability is referred to as “sampling error” and is expressed as a band or “margin of error” (MOE) around the estimate.

This report uses Census and ACS data because, despite the inherent methodological limits, they represent the most thorough and accurate data available to assess housing needs. We consider these limitations in making interpretations of the data and have strived not to draw conclusions beyond the quality of the data.

Trends in Housing Mix

This section provides an overview of changes in the mix of housing types in Tualatin and compares Tualatin to Washington County and to Oregon. These trends demonstrate the types of housing developed in Tualatin historically. Unless otherwise noted, this chapter and the next chapter uses data from the 2000 and 2010 Decennial Census and the 2013-2017 American Community Survey 5-Year Estimates.

This section shows the following trends in housing mix in Tualatin:

- **About half (53%) of Tualatin’s housing stock is single-family detached housing units.** Forty-one percent of Tualatin’s housing stock is multifamily and 6% is single-family attached (e.g., townhouses, rowhouses, duplexes).
- **Since 2000, Tualatin’s housing mix has remained relatively static.** Tualatin’s housing stock grew by about 23% (about 2,112 new units) between 2000 and the 2013-2017 period.
- **Single-family housing accounted for the majority of new housing growth in Tualatin between 2000 and 2017.** Sixty percent of new housing built between 2000 and 2017 was single-family housing (detached and attached).

⁶ A thorough description of the ACS can be found in the Census Bureau’s publication “What Local Governments Need to Know.” <https://www.census.gov/library/publications/2009/acs/state-and-local.html>

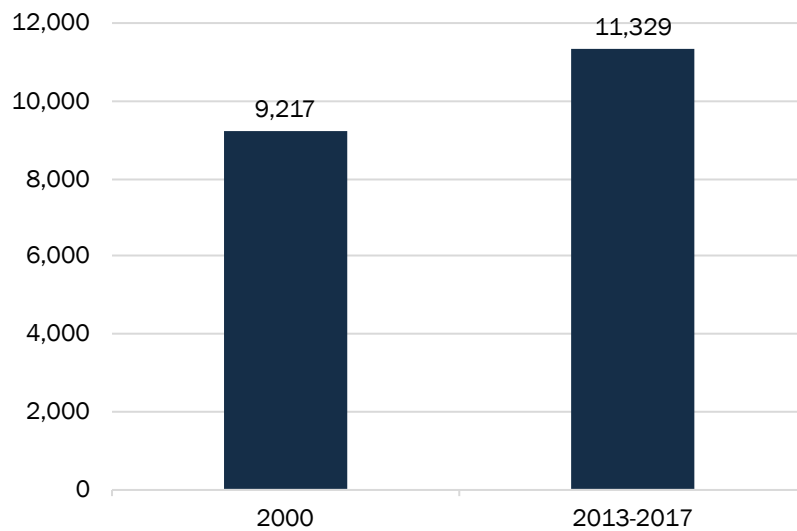
Housing Mix

The total number of dwelling units in Tualatin increased by 23% from 2000 to 2013-2017.

Tualatin added 2,112 units since 2000.

Exhibit 10. Total Dwelling Units, Tualatin, 2000 and 2013-2017

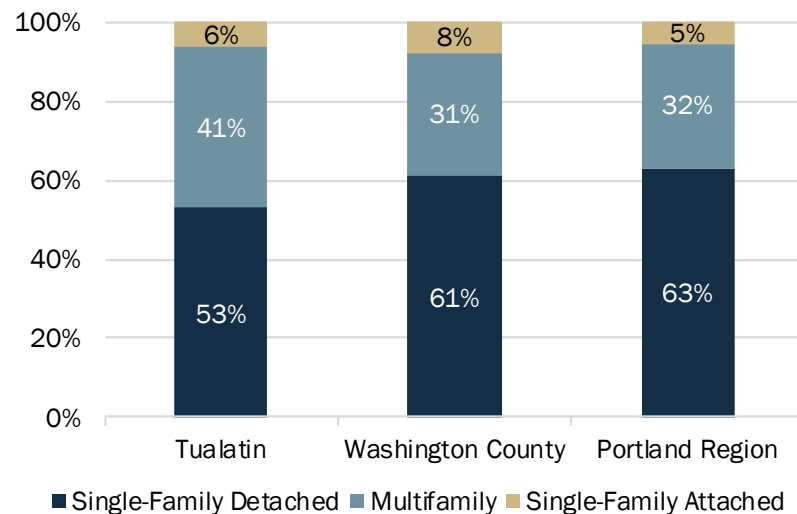
Source: U.S. Census Bureau, 2000 Decennial Census, SF3 Table H030, and 2013-2017 ACS Table B25024.



Tualatin had a smaller share of single-family detached housing and a larger share of multifamily housing than Washington County and the Portland Region.

Exhibit 11. Housing Mix, Tualatin, Washington County, Portland Region, 2013-2017

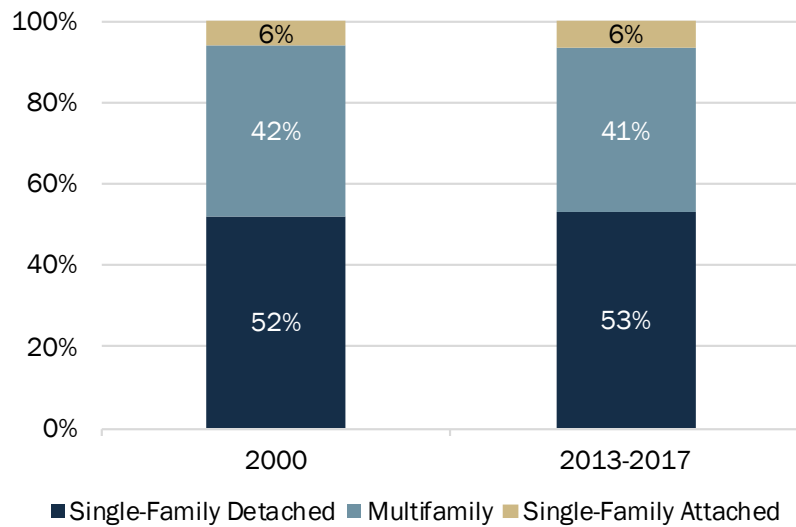
Source: U.S. Census Bureau, 2013-2017 ACS Table B25024.



From 2000 to 2013-2017, Tualatin's housing mix stayed about the same.

Exhibit 12. Change in Housing Mix, Tualatin, 2000 and 2013-2017

Source: U.S. Census Bureau, 2000 Decennial Census, SF3 Table H030, and 2013-2017 ACS Table B25024.



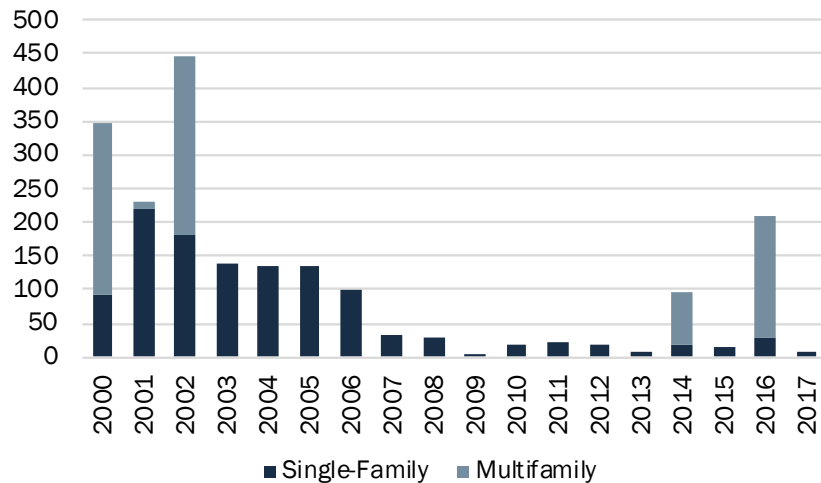
Dwelling Units Built

Over the 2000 to 2017 period, Tualatin added 1,996 dwelling units, with an annual average of 111 dwelling units.

Of these 1,996 units, about 60% were single-family units and 40% were multifamily units.

Exhibit 13. Units Built by Year and Type of Unit, Tualatin, 2000 through 2017

Source: RLIS.



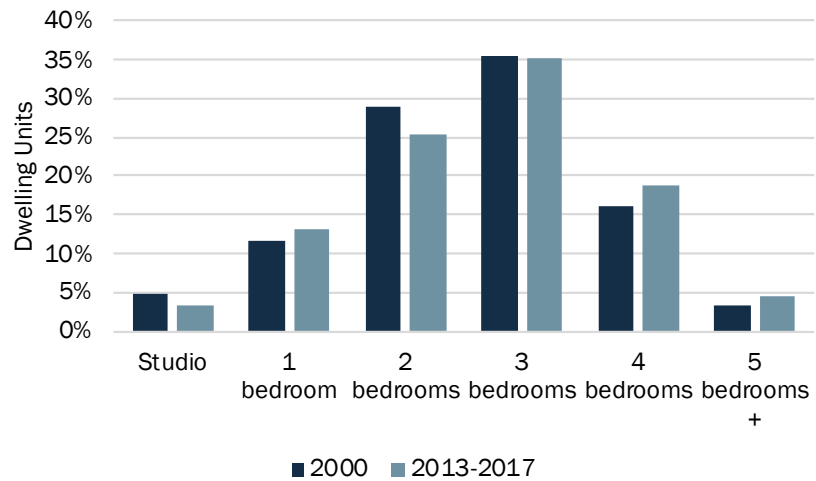
Size of Units

This section provides an overview of dwelling unit size in Tualatin.

In 2000, a larger share of dwelling units in Tualatin were three-bedroom units. As of the 2013-2017 period, this trend continues to persist.

Exhibit 14. Share of Units by Number of Bedrooms, Tualatin, 2000 and 2013-2017

Source: U.S. Census Bureau, 2000 Decennial Census, SF3 Table H041, and 2013-2017 ACS Table B25041. Note: The total number of units in 2000 is 9,217; the total number of units in the 2013-17 period is 11,329.

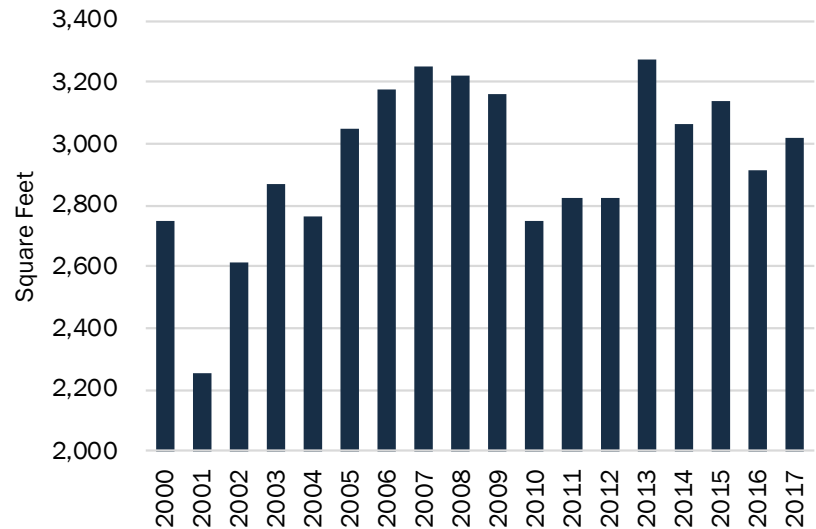


Single-family units built in Tualatin since 2000, averaged 2,773 sq. ft. per unit.

Single-family units built in Tualatin since 2014, averaged 3,015 sq. ft. per unit.

Exhibit 15. Average Size of Single-Family Units Built by Year, Tualatin, 2010 through 2017

Source: RLIS. Note: Single-family units include single-family detached and attached units.



Based on historical trends, condominiums in Tualatin were slightly smaller than single-family dwellings (Exhibit 15) and slightly larger than apartments.

Exhibit 16. Average Size of Multifamily Units Built by Year (including housing description), Tualatin, 2000, 2001, 2002, 2014, and 2016

Source: RLIS, Costar, and Washington County Assessor.

2000:	1,172 Sq. Ft. Condominium
2001:	1,562 Sq. Ft. Condominium
2002:	892 Sq. Ft. Apartment
2014:	1,322 Sq. Ft. Retirement Facility
2016:	977 Sq. Ft. Apartment

On average, a 2-bedroom multifamily unit in Tualatin is about 928 sq. ft.

Exhibit 17. Average Square Feet of Multifamily Units, Tualatin, 2019

Source: Costar. Note: "All Beds" represent the aggregate of multifamily units in Tualatin (recognizing that bedroom counts are unknown for some units).

Multifamily Unit by Bedroom Count	Average Sq. Ft. (2019)	Inventory (Units)
All Beds	856	3,905
Studio	445	249
1-Bedroom	649	1,206
2-Bedrooms	928	1,739
3-Bedrooms	1,144	608
4+ Bedrooms	1,255	4

Trends in Housing Density

Housing density is the density of housing by structure type, expressed in dwelling units per net or gross acre. The U.S. Census does not track residential development density thus, this study analyzes housing density based on Metro’s RLIS database for development between 2000 and 2017.

Between 2000 and 2017, Tualatin permitted 1,996 new dwelling units. Of the 1,996 new units, 1,207 units were single-family (60%) and 789 units were multifamily (40%). During this time, housing in Tualatin developed at an average net density of 8.7 dwelling units per net acre. Exhibit 18 shows average net residential development by structure type for the historical analysis period. Single-family housing (detached and attached) developed at 6.4 units per net acre and multifamily housing developed at 19.9 units per net acre.

Exhibit 18. Net Density by Unit Type and Zone, Tualatin, 2000 through 2017

Source: RLIS.

Note: Single-family includes single-family detached and single-family attached units because RLIS data does not distinguish between the type of single-family unit.

	Single-family (Detached and Attached)			Multifamily			Total, combined		
	Units	Acres	Net Density	Units	Acres	Net Density	Units	Acres	Net Density
Low Density Residential	976	172	5.7				976	172	5.7
Medium Low Density Residential	79	10	8.0	90	5	19.5	169	14	11.7
High Density Residential	152	6	23.4	699	35	19.9	851	42	20.5
Total	1,207	189	6.4	789	40	19.9	1,996	228	8.7

Trends in Tenure

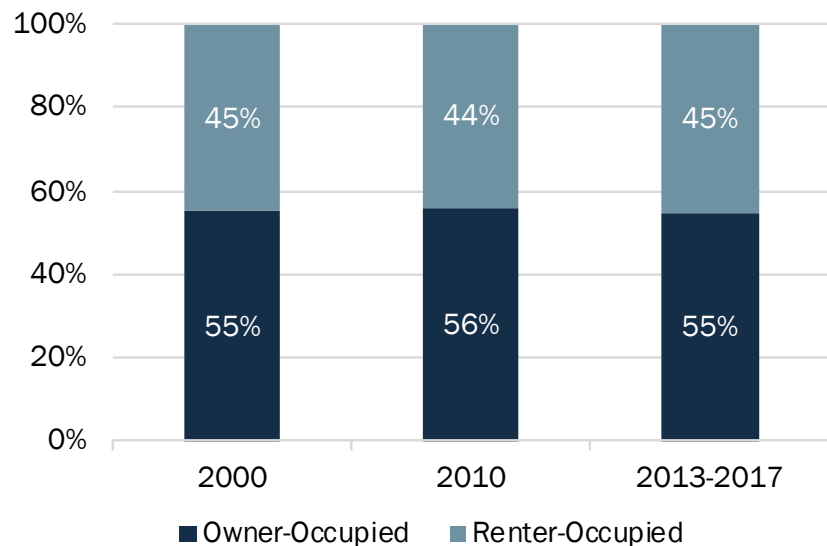
Housing tenure describes whether a dwelling unit is owner- or renter-occupied. This section shows:

- **Homeownership in Tualatin is lower than Washington County's and Oregon's rate.** About 55% of Tualatin's households own their own home. In comparison, 61% of Washington County households and 60% of Oregon households are homeowners.
- **Homeownership in Tualatin stayed about the same between 2000 and 2013-2017.** Homeownership hovered around 55% in 2000, 2010, and the 2013-2017 period.
- **Most of Tualatin homeowners (88%) live in single-family detached housing, while most of Tualatin's renters (82%) live in multifamily housing.**

The homeownership rate in Tualatin stayed about the same since 2000.

Exhibit 19. Tenure, Occupied Units, Tualatin, 2000, 2010, and 2013-2017

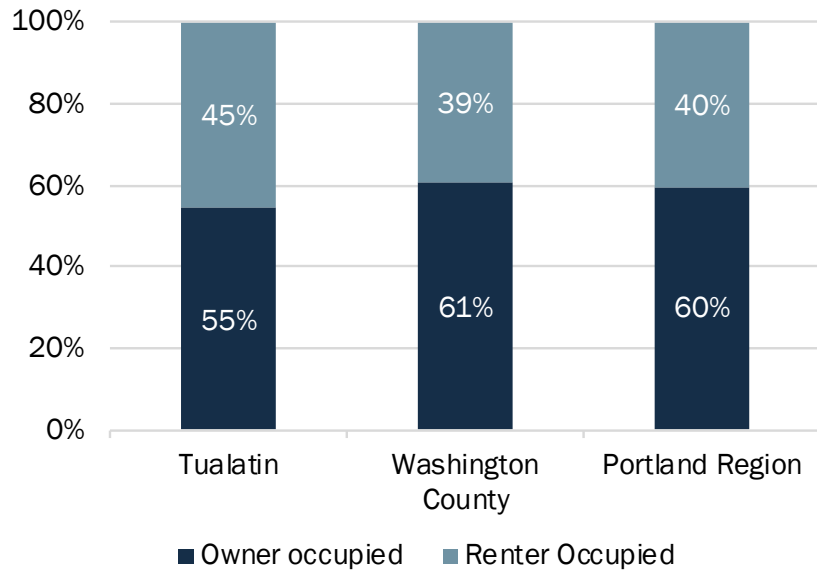
Source: U.S. Census Bureau, 2000 Decennial Census SF1 Table H004, 2010 Decennial Census SF1 Table H4, 2013-2017 ACS Table B24003.



Tualatin had a lower homeownership rate than Washington County and the Portland Region.

Exhibit 20. Tenure, Occupied Units, Tualatin, Washington County, and Portland Region, 2013-2017

Source: U.S. Census Bureau, 2013-2017 ACS 5-Year Estimates, Table B24003.

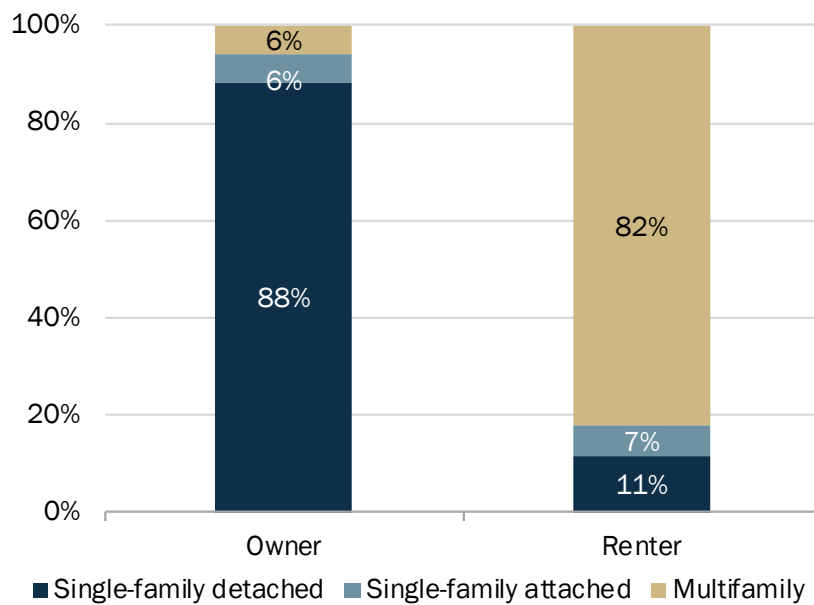


Most of Tualatin homeowners (88%) lived in single-family detached housing.

In comparison, most of Tualatin renters lived in multifamily housing.

Exhibit 21. Housing Units by Type and Tenure, Tualatin, 2013-2017

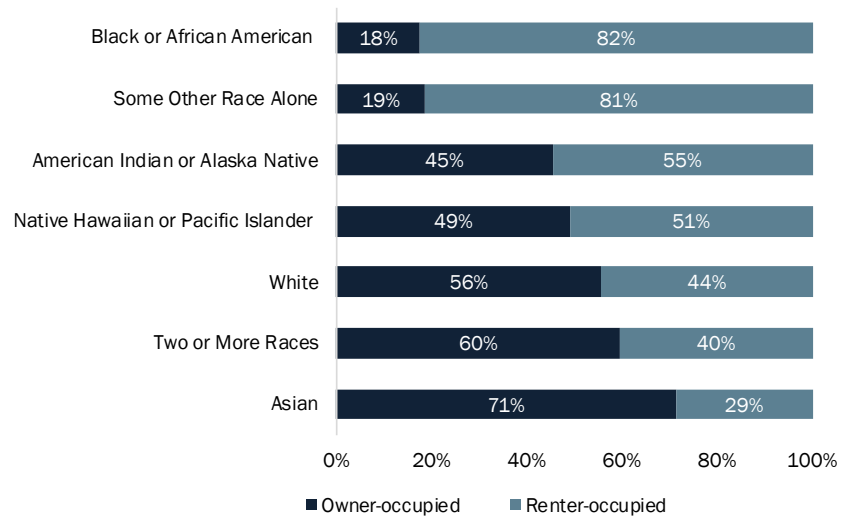
Source: U.S. Census Bureau, 2013-2017 ACS Table B25032.



A proportionately smaller share of households with an African American head of household were homeowners.

Exhibit 22. Tenure by Race of the Head of Household, Tualatin, 2013-2017

Source: U.S. Census Bureau, 2013-2017 ACS Table B25003A-G.



Most households with a Latinx head of household were renters.

Exhibit 23. Tenure by Latinx Head of Household, Tualatin, 2013-2017

Source: U.S. Census Bureau, 2013-2017 ACS Table B250031.



Vacancy Rates

Housing vacancy is a measure of housing that is available to prospective renters and buyers. It is also a measure of unutilized housing stock. The Census defines vacancy as: "Unoccupied housing units...determined by the terms under which the unit may be occupied, e.g., for rent, for sale, or for seasonal use only." The 2010 Census identified vacancy through an enumeration, separate from (but related to) the survey of households. Enumerators are obtained using information from property owners and managers, neighbors, rental agents, and others.

According to the 2013-2017 Census, the vacancy rate in Tualatin was 4.3%, compared to 4.8% for Washington County and 5.5% for the Portland Region.

Tualatin's vacancy rate declined from 2000 to the 2013-2017 period.

Exhibit 24. Vacancy Rate, Tualatin, 2000 and 2013-2017

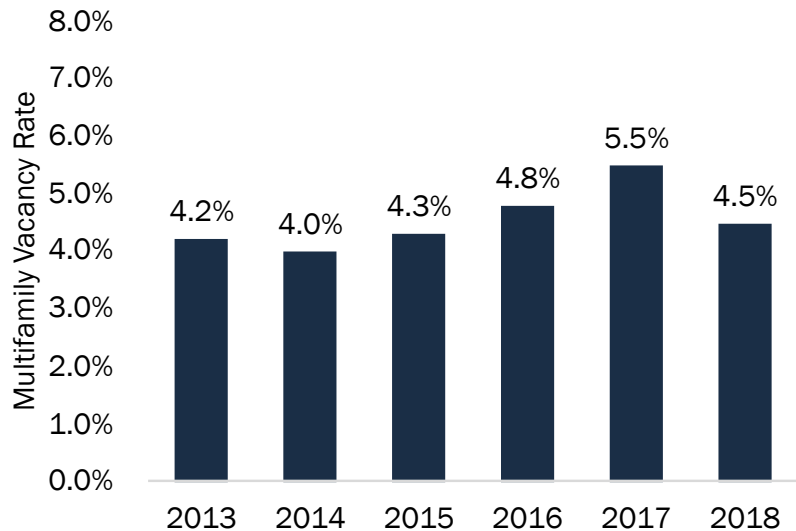
Source: U.S. Census Bureau, 2000 Decennial Census SF1 Table H005, 2013-2017 ACS Table B25004.

2000	6.2% Of Total Dwelling Units
2013-2017	4.3% Of Total Dwelling Units

Tualatin's average multifamily vacancy rate dipped to a low of 4% in 2014. In 2018, Tualatin's multifamily vacancy rate was 4.5%.

Exhibit 25. Average Multifamily Vacancy Rate, Tualatin, 2013 through 2018

Source: CoStar.



As of 2013-2017, less than half a percent of Tualatin's dwelling units were vacant for seasonal, recreational, or occasional use (e.g. short-term rentals or vacation homes).

Exhibit 26. Vacancy for Seasonal, Recreational, or Occasional Use, Tualatin, 2000 and 2013-2017

Source: U.S. Census Bureau, 2000 Decennial Census SF1 Table H005, 2013-2017 ACS Table B25004.

2000	43 Units	0.5%
		Share of Total Dwelling Units
2013-2017	44 Units	0.4%
		Share of Total Dwelling Units

Rent-Restricted Housing

Governmental agencies offer subsidies to support housing development for low- and moderate-income households. Tualatin has three rent-restricted housing developments, with 604 subsidized units.

Exhibit 27. Government-Assisted Housing, Tualatin, December 2019

Source: Oregon Housing and Community Services, Affordable Housing Inventory in Oregon (data pulled December 2019).

Housing Developments	Total Units	Affordable Units	Population Served	Government Subsidy Type	Affordability Contract Expiration
Terrace View	100	100	Family	LIHTC 4%	January 2028
Tualatin Meadows	240	240	Family	LIHTC 4%	January 2031
Woodridge	264	264	Family	OHCS Grants	March 2049
Total	604	604			

In addition to these rent-restricted units, and as of August 5, 2019, households in Tualatin utilized 113 of Washington County Housing Authority's Housing Choice Vouchers.⁷

⁷ More information about Housing Choice Vouchers: https://www.hud.gov/program_offices/public_indian_housing/programs/hcv/about/fact_sheet

Manufactured Homes

Manufactured homes provide a source of affordable housing in Tualatin. They provide a form of homeownership that can be made available to low- and moderate-income households. Cities are required to plan for manufactured homes—both on lots and in parks (ORS 197.475-492).

Generally, manufactured homes in parks are owned by the occupants who pay rent for the space. Monthly housing costs are typically lower for a homeowner in a manufactured home park for several reasons, including the fact that property taxes levied on the value of the land are paid by the property owner, rather than the manufactured homeowner. The value of the manufactured home generally does not appreciate in the way a conventional home would, however. Manufactured homeowners in parks are also subject to the mercy of the property owner in terms of rent rates and increases. It is generally not within the means of a manufactured homeowner to relocate to another manufactured home to escape rent increases. Homeowners living in a park is desirable to some because it can provide a more secure community with on-site managers and amenities, such as laundry and recreation facilities.

OAR 197.480(4) requires cities to inventory the mobile home or manufactured dwelling parks sited in areas planned and zoned or generally used for commercial, industrial, or high-density residential development.⁸ Exhibit 28 presents the inventory of mobile and manufactured home parks within Tualatin as of early 2019.

Tualatin has two manufactured housing parks, with a total of 178 spaces within its city limits.

Exhibit 28. Inventory of Mobile/Manufactured Home Parks, Tualatin City Limits, March 2019

Source: Oregon Manufactured Dwelling Park Directory.

Name	Location	Type	Total Spaces	Vacant Spaces	Plan Designation
Angel Haven	18485 SW Pacific Dr	Senior	129	2	RML
Willow Glen	9700 SW Tualatin Rd	Family	49	1	RML
Total			178	3	

⁸ ORS 90.645 regulates rules about closure of manufactured dwelling parks. It requires that the landlord do the following for manufactured dwelling park tenants before closure of the park: give at least one year's notice of park closure, pay the tenant between \$5,000 to \$9,000 for each manufactured dwelling park space, and refrain from charging tenants demolition costs of abandoned manufactured homes.

4. Demographic and Other Factors Affecting Residential Development in Tualatin

Demographic trends are important for a thorough understanding of the dynamics of the Tualatin housing market. Tualatin exists in a regional economy; trends in the region impact the local housing market. This chapter documents demographic, socioeconomic, and other trends relevant to Tualatin at the national, state, and regional levels.

Demographic trends provide a context for growth in a region; factors such as age, income, migration, and other trends show how communities have grown and how they will shape future growth. To provide context, we compare Tualatin to Washington County and Oregon. We also compare Tualatin to nearby cities where appropriate. Characteristics such as age and ethnicity are indicators of how the population has grown in the past and provide insight into factors that may affect future growth.

A recommended approach to conducting a housing needs analysis is described in *Planning for Residential Growth: A Workbook for Oregon's Urban Areas*, the Department of Land Conservation and Development's guidebook on local housing needs studies. As described in the workbook, the specific steps in the housing needs analysis are:

1. Project the number of new housing units needed in the next 20 years.
2. Identify relevant national, state, and local demographic and economic trends and factors that may affect the 20-year projection of structure type mix.
3. Describe the demographic characteristics of the population and, if possible, the housing trends that relate to demand for different types of housing.
4. Determine the types of housing that are likely to be affordable to the projected households based on household income.
5. Determine the needed housing mix and density ranges for each Plan Designation and the average needed net density for all structure types.
6. Estimate the number of additional needed units by structure type.

This chapter presents data to address steps 2, 3, and 4 in this list. Chapter 5 presents data to address steps 1, 5, and 6 in this list.

Demographic and Socioeconomic Factors Affecting Housing Choice⁹

Analysts typically describe housing demand as the *preferences* for different types of housing (e.g., single-family detached or apartment), and *the ability to pay* for that housing (the ability to exercise those preferences in a housing market by purchasing or renting housing; in other words, income or wealth).

Many demographic and socioeconomic variables affect housing choice. However, the literature about housing markets finds that age of the householder, size of the household, and income are most strongly correlated with housing choice.

- **Age of householder** is the age of the person identified (in the Census) as the head of household. Households make different housing choices at different stages of life. This chapter discusses generational trends, such as housing preferences of Baby Boomers, people born from about 1946 to 1964, and Millennials, people born from about 1980 to 2000.
- **Size of household** is the number of people living in the household. Younger and older people are more likely to live in single-person households. People in their middle years are more likely to live in multiple person households (often with children).
- **Household income** is the household income. Income is probably the most important determinant of housing choice. Income is strongly related to the type of housing a household chooses (e.g., single-family detached, duplex, triplex, quadplex, or a building with more than five units) and to household tenure (e.g., rent or own).

⁹ The research in this chapter is based on numerous articles and sources of information about housing, including:

Davis, Hibbits, & Midghal Research, "Metro Residential Preference Survey," May 2014.

D. Myers and S. Ryu, *Aging Baby Boomers and the Generational Housing Bubble*, Journal of the American Planning Association, Winter 2008.

George Galster. *People Versus Place, People and Place, or More? New Directions for Housing Policy*, Housing Policy Debate, 2017.

Herbert, Christopher and Hrabchak Molinsky. "Meeting the Housing Needs of an Aging Population," 2015.

J. McIlwain, *Housing in America: The New Decade*, Urban Land Institute, 2010.

L. Lachman and D. Brett, *Generation Y: America's New Housing Wave*, Urban Land Institute, 2010.

Schuetz, Jenny. *Who is the new face of American homeownership?* Brookings, 2017.

The American Planning Association, "Investing in Place; Two generations' view on the future of communities," 2014.

Transportation for America, "Access to Public Transportation a Top Criterion for Millennials When Deciding Where to Live, New Survey Shows," 2014.

This chapter focuses on these factors, presenting data that suggests how changes to these factors may affect housing need in Tualatin over the next 20 years.

National Trends¹⁰

This brief summary on national housing trends builds on previous work by ECONorthwest, the Urban Land Institute (ULI) reports, and conclusions from *The State of the Nation's Housing, 2018* report from the Joint Center for Housing Studies of Harvard University. The Harvard report summarizes the national housing outlook as follows:

“By many metrics, the housing market is on sound footing. With the economy near full employment, household incomes are increasing and boosting housing demand. On the supply side, a decade of historically low single-family construction has left room for expansion of this important sector of the economy. Although multifamily construction appears to be slowing, vacancy rates are still low enough to support additional rentals. In fact, to the extent that growth in supply outpaces demand, a slowdown in rent growth should help to ease affordability concerns.”

However, challenges to a strong domestic housing market remain. High housing costs make housing unaffordable for many Americans, especially younger Americans. In addition to rising housing costs, wages have also failed to keep pace, worsening affordability pressures. Single-family and multifamily housing supplies remain tight, which compound affordability issues. *The State of the Nation's Housing* report emphasizes the importance of government assistance and intervention to keep housing affordable moving forward. Several challenges and trends shaping the housing market are summarized below:

- **Moderate new construction and tight housing supply, particularly for affordable housing.** New construction experienced its eighth year of gains in 2017 with 1.2 million units added to the national stock. Estimates for multifamily starts range between 350,000 to 400,000 (2017). The supply of for sale homes in 2017 averaged 3.9 months, below what is considered balanced (six months) and lower-cost homes are considered especially scarce. The State of the Nation's Housing report cites lack of skilled labor, higher building costs, scarce developable land, and the cost of local zoning and regulation as impediments to new construction.
- **Demand shift from renting to owning.** After years of decline, the national homeownership rate increased from a 50-year low of 62.9% in 2016 (Q2) to 63.7% in 2017 (Q2). Trends suggest homeownership among householders aged 65 and older have remained strong and homeownership rates among young adults have begun stabilizing after years of decline.
- **Housing affordability.** In 2016, almost one-third of American households spent more than 30% of their income on housing. This figure is down from the prior year,

¹⁰ These trends are based on information from: (1) The Joint Center for Housing Studies of Harvard University's publication "The State of the Nation's Housing 2018," (2) Urban Land Institute, "2018 Emerging Trends in Real Estate," and (3) the U.S. Census.

bolstered by a considerable drop in the owner share of cost-burdened households. Low-income households face an especially dire hurdle to afford housing. With such a large share of households exceeding the traditional standards for affordability, policymakers are focusing efforts on the severely cost-burdened. Among those earning less than \$15,000, more than 70% of households paid more than half of their income on housing.

- **Long-term growth and housing demand.** The Joint Center for Housing Studies forecasts that nationally, demand for new homes could total as many as 12 million units between 2017 and 2027. Much of the demand will come from Baby Boomers, Millennials,¹¹ and immigrants. The Urban Land Institute cites the trouble of overbuilding in the luxury sector while demand is in mid-priced single-family houses affordable to a larger buyer pool.
- **Growth in rehabilitation market.**¹² Aging housing stock and poor housing conditions are growing concerns for jurisdictions across the United States. With almost 80% of the nation's housing stock at least 20 years old (40% at least 50 years old), Americans are spending in excess of \$400 billion per year on residential renovations and repairs. As housing rehabilitation becomes the go-to solution to address housing conditions, the home remodeling market has grown more than 50% since the recession ended — generating 2.2% of national economic activity (in 2017).

Despite trends suggesting growth in the rehabilitation market, rising construction costs and complex regulatory requirements pose barriers to rehabilitation. Lower-income households or households on fixed-incomes may defer maintenance for years due to limited financial means, escalating rehabilitation costs. At a certain point, the cost of improvements may outweigh the value of the structure, which may necessitate new responses such as demolition or redevelopment.

- **Changes in housing preference.** Housing preference will be affected by changes in demographics; most notably, the aging of the Baby Boomers, housing demand from Millennials, and growth of immigrants.
 - *Baby Boomers.* The housing market will be affected by continued aging of the Baby Boomers, the oldest of whom were in their seventies in 2018 and the youngest of whom were in their fifties in 2018. Baby Boomers' housing choices will affect housing preference and homeownership. Addressing housing needs for those moving through their 60s, 70s, and 80s (and beyond) will require a

¹¹ According to the Pew Research Center, Millennials were born between the years of 1981 to 1996 (inclusive). Read more about generations and their definitions here: <http://www.pewresearch.org/fact-tank/2018/03/01/defining-generations-where-millennials-end-and-post-millennials-begin/>.

To generalize, and because there is no official generation of millennial, we define this cohort as individuals born between 1980 and 2000.

¹² These findings are copied from: Joint Center for Housing Studies. (2019). Improving America's Housing, Harvard University. https://www.jchs.harvard.edu/sites/default/files/Harvard_JCHS_Improving_Americas_Housing_2019.pdf

range of housing opportunities. For example, “the 82-to-86-year-old cohort dominates the assisted living and more intensive care sector” while new or near-retirees may prefer aging in place or active, age-targeted communities.¹³ Characteristics like immigration and ethnicity play a role too as “older Asians and Hispanics are more likely than whites or blacks to live in multigenerational households.”¹⁴ Senior households earning different incomes may make distinctive housing choices. For instance, low-income seniors may not have the financial resources to live out their years in a nursing home and may instead choose to downsize to smaller, more affordable units. Seniors living in close proximity to relatives may also choose to live in multigenerational households. Research shows that “older people in western countries prefer to live in their own familiar environment as long as possible,” but aging in place does not only mean growing old in their own homes.¹⁵ A broader definition exists which explains that aging in place also means “remaining in the current community and living in the residence of one’s choice.”¹⁶ Therefore, some Boomers are likely to stay in their home as long as they are able, and some will prefer to move into other housing products, such as multifamily housing or age-restricted housing developments, before they move into to a dependent living facility or into a familial home. Moreover, “the aging of the U.S. population, [including] the continued growth in the percentage of single-person households, and the demand for a wider range of housing choices in communities across the country is fueling interest in new forms of residential development, including tiny houses.”¹⁷

- *Millennials*. Over the last several decades, young adults increasingly lived in multi-generational housing – and increasingly more so than older demographics.¹⁸ Despite this trend, as Millennials age over the next 20 years, they will be forming households and families. In 2018, the oldest Millennials were in their late-30s and the youngest were in their late-teens. By 2040, Millennials will be between 40 and 60 years old.

At the beginning of the 2007-2009 recession, Millennials only started forming their own households. Today, Millennials are driving much of the growth in new households, albeit at slower rates than previous generations. From 2012 to 2017,

¹³ Urban Land Institute. Emerging Trends in Real Estate, United States and Canada. 2018.

¹⁴ Herbert, Christopher and Hrabchak Molinsky (2015). Meeting the Housing Needs of an Aging Population. https://shelterforce.org/2015/05/30/meeting_the_housing_needs_of_an_aging_population/

¹⁵ Vanleerberghe, Patricia, et al. The quality of life of older people aging in place: a literature review. 2017.

¹⁶ Ibid.

¹⁷ American Planning Association. Making Space for Tiny Houses, Quick Notes.

¹⁸ According to the Pew Research Center, in 1980, just 11% of adults aged 25 to 34 lived in a multi-generational family household and by 2008, 20% did (82% change). Comparatively, 17% of adults aged 65 and older lived in a multi-generational family household and by 2008, 20% did (18% change).

millennials formed an average of 2.1 million net new households each year. Twenty-six percent of Millennials aged 25 to 34 lived with their parents (or other relatives) in 2017.

Millennials' average wealth may remain far below Boomers and Gen Xers and student loan debt will continue to hinder consumer behavior and affect retirement savings. As of 2015, Millennial's comprised 28% of active home buyers, while Gen Xers comprised 32% and Boomers 31%.¹⁹ That said, "over the next 15 years, nearly \$24 trillion will be transferred in bequests," presenting new opportunities for Millennials (as well as Gen Xers).

- *Immigrants.* Research on foreign-born populations find that immigrants, more than native-born populations, prefer to live in multi-generational housing. Still, immigration and increased homeownership among minorities could also play a key role in accelerating household growth over the next 10 years. Current Population Survey estimates indicate that the number of foreign-born households rose by nearly 400,000 annually between 2001 and 2007, and they accounted for nearly 30% of overall household growth. Beginning in 2008, the influx of immigrants was stunted by the effects of the Great Recession. After a period of declines, however, the foreign born are again contributing to household growth. The Census Bureau's estimates of net immigration in 2017–2018 indicate that 1.2 million immigrants moved to the U.S. from abroad, down from 1.3 million immigrants in 2016-2017 but higher than the average annual pace of 850,000 during the period of 2009–2011. However, if recent Federal policies about immigration are successful, growth in undocumented and documented immigration could slow and cause a drag on household growth in the coming years.
- *Diversity.* The growing diversity of American households will have a large impact on the domestic housing markets. Over the coming decade, minorities will make up a larger share of young households and constitute an important source of demand for both rental housing and small homes. The growing gap in homeownership rates between whites and blacks, as well as the larger share of minority households that are cost burdened warrants consideration. Since 1994, the difference in homeownership rates between whites and blacks rose by 1.9 percentage points to 29.2% in 2017. Alternatively, the gap between white and Latinx homeownership rates and white and Asian homeownership rates both decreased during this period but remained sizable at 26.1 and 16.5 percentage points, respectively. Although homeownership rates are increasing for some minorities, large shares of minority households are more likely to live in high-cost metro areas. This, combined with lower incomes than white households,

¹⁹ Srinivas, Val and Goradia, Urval (2015). The future of wealth in the United States, Deloitte Insights. <https://www2.deloitte.com/insights/us/en/industry/investment-management/us-generational-wealth-trends.html>

leads to higher rates of cost burden for minorities—47% for blacks, 44% for Latinx, 37% for Asians/others, and 28% for whites in 2015.

- **Changes in housing characteristics.** The U.S. Census Bureau’s Characteristics of New Housing Report (2017) presents data that show trends in the characteristics of new housing for the nation, state, and local areas. Several long-term trends in the characteristics of housing are evident from the New Housing Report:²⁰
 - *Larger single-family units on smaller lots.* Between 1999 and 2017, the median size of new single-family dwellings increased by 20% nationally, from 2,028 sq. ft. to 2,426 sq. ft., and 20% in the western region from 2,001 sq. ft. in 1999 to 2,398 sq. ft. in 2017. Moreover, the percentage of new units smaller than 1,400 sq. ft. nationally, decreased by more than half, from 15% in 1999 to 6% in 2017. The percentage of units greater than 3,000 sq. ft. increased from 17% in 1999 to 25% of new one-family homes completed in 2017. In addition to larger homes, a move towards smaller lot sizes is seen nationally. Between 2009 and 2017, the percentage of lots less than 7,000 sq. ft. increased from 25% to 31% of lots.
 - *Larger multifamily units.* Between 1999 and 2017, the median size of new multiple family dwelling units increased by 5.3% nationally and 2.4% in the Western region. Nationally, the percentage of new multifamily units with more than 1,200 sq. ft. increased from 28% in 1999 to 33% in 2017 and increased from 25% to 28% in the Western region.
 - *Household amenities.* Across the U.S. and since 2013, an increasing number of new units had air-conditioning (fluctuating year by year at over 90% for both new single-family and multifamily units). In 2000, 93% of new single-family houses had two or more bathrooms, compared to 97% in 2017. The share of new multifamily units with two or more bathrooms decreased from 55% of new multifamily units to 45%. As of 2017, 65% of new single-family houses in the U.S. had one or more garages (from 69% in 2000).
 - *Shared amenities.* Housing with shared amenities are growing in popularity as it may improve space efficiencies and reduce per-unit costs / maintenance costs. Single-Room Occupancies (SROs)²¹, Cottage Clusters, co-housing developments, and multifamily products are common housing types that take advantage of this trend. Shared amenities may take many forms and include shared: bathrooms; kitchens and other home appliances (e.g. laundry facilities, outdoor grills);

²⁰ U.S. Census Bureau, Highlights of Annual 2017 Characteristics of New Housing. Retrieved from: <https://www.census.gov/construction/charts/highlights.html>.

²¹ Single-room occupancies are residential properties with multiple single room dwelling units occupied by a single individual. From: U.S. Department of Housing and Urban Development. (2001). *Understanding SRO*. <https://www.hudexchange.info/resources/documents/Understanding-SRO.pdf>

security systems; outdoor areas (e.g. green space, pathways, gardens, rooftop lounges); fitness rooms, swimming pools, and tennis courts; and free parking.²²

State Trends

Oregon's 2016-2020 Consolidated Plan includes a detailed housing needs analysis as well as strategies for addressing housing needs statewide. The plan concludes that “a growing gap between the number of Oregonians who need affordable housing and the availability of affordable homes has given rise to destabilizing rent increases, an alarming number of evictions of low- and fixed- income people, increasing homelessness, and serious housing instability throughout Oregon.”

It identified the following issues that describe housing need statewide:²³

- For housing to be considered affordable, a household should pay up to one-third of their income toward rent, leaving money left over for food, utilities, transportation, medicine, and other basic necessities. Today, one in two Oregon households pays more than one-third of their income toward rent, and one in three pays more than half of their income toward rent.
- More school children are experiencing housing instability and homelessness. The rate of K-12 homeless children increased by 12% from the 2013-2014 school year to the 2014-2015 school year.
- Oregon has 28,500 rental units that are affordable and available to renters with extremely low incomes. There are about 131,000 households that need those apartments, leaving a gap of 102,500 units.
- Housing instability is fueled by an unsteady, low-opportunity employment market. Over 400,000 Oregonians are employed in low-wage work. Low-wage work is a growing share of Oregon's economy. When wages are set far below the cost needed to raise a family, the demand for public services grows to record heights.
- Women are more likely than men to end up in low-wage jobs. Low wages, irregular hours, and part-time work compound issues.

²² Urbsworks. (n.d.). Housing Choices Guide Book: A Visual Guide to Compact Housing Types in Northwest Oregon. https://www.oregon.gov/lcd/Publications/Housing-Choices-Booklet_DIGITAL.pdf

Saiz, Albert and Salazar, Arianna. (n.d.). Real Trends: The Future of Real Estate in the United States. Center for Real Estate, Urban Economics Lab.

²³ These conclusions are copied directly from the report: Oregon's 2016-2020 Consolidated Plan <http://www.oregon.gov/ohcs/docs/Consolidated-Plan/2016-2020-Consolidated-Plan-Amendment.pdf>.

- People of color historically constitute a disproportionate share of the low-wage work force. About 45% of Latinx, and 50% of African Americans, are employed in low-wage industries.
- The majority of low-wage workers are adults over the age of 20, many of whom have earned a college degree, or some level of higher education.
- In 2019, minimum wage in Oregon²⁴ was \$11.25, \$12.50 in the Portland Metro, and \$11.00 for non-urban counties.

Oregon’s 2018 *Statewide Housing Plan* identified six housing priorities to address in communities across the State over 2019 to 2023, summarized below. It includes relevant data to help illustrate the rationale for each priority. The 2018 *Statewide Housing Plan* describes the Oregon Housing and Community Services’ (OHCS) goals and implementation strategies for achieving the goals.²⁵

- **Equity and Racial Justice.** *Advance equity and racial justice by identifying and addressing institutional and systemic barriers that have created and perpetuated patterns of disparity in housing and economic prosperity.*
 - Summary of the issue: In Oregon, 26% of people of color live below the poverty line in Oregon, compared to 15% of the White population.
 - 2019-2023 Goal: Communities of color will experience increased access to OHCS resources and achieve greater parity in housing stability, self-sufficiency and homeownership. OHCS will collaborate with its partners and stakeholders to create a shared understanding of racial equity and overcome systemic injustices faced by communities of color in housing discrimination, access to housing and economic prosperity.
- **Homelessness.** *Build a coordinated and concerted statewide effort to prevent and end homelessness, with a focus on ending unsheltered homelessness of Oregon’s children and veterans.*
 - Summary of the issue: According to the Point-in-Time count, approximately 14,000 Oregonians experienced homelessness in 2017, an increase of nearly 6% since 2015. Oregon’s unsheltered population increased faster than the sheltered population, and the state’s rate of unsheltered homelessness is the third highest in the nation, at 57%. The state’s rate of unsheltered homelessness among people in families with children is the second highest in the nation, at 52%.

²⁴ The 2016 Oregon Legislature, Senate Bill 1532, established a series of annual minimum wage rate increases beginning July 1, 2016 through July 1, 2022. <https://www.oregon.gov/boli/whd/omw/pages/minimum-wage-rate-summary.aspx>

²⁵ Priorities and factoids are copied directly from the report: Oregon Housing and Community Services (November 2018). *Breaking New Ground, Oregon’s Statewide Housing Plan, Draft*. <https://www.oregon.gov/ohcs/DO/shp/OregonStatewideHousingPlan-PublicReviewDraft-Web.pdf>

- 2019-2023 Goal: OHCS will drive toward impactful homelessness interventions by increasing the percentage of people who are able to retain permanent housing for at least six months after receiving homeless services to at least 85 percent. We will also collaborate with partners to end veterans' homelessness in Oregon and build a system in which every child has a safe and stable place to call home.
- **Permanent Supportive Housing.** *Invest in permanent supportive housing, a proven strategy to reduce chronic homelessness and reduce barriers to housing stability.*
 - Summary of the issue: Oregon needs about 12,388 units of permanent supportive housing to serve individuals and families with a range of needs and challenges.
 - 2019-2023 Goal: OHCS will increase our commitment to permanent supportive housing by funding the creation of 1,000 or more additional permanent supportive housing units to improve the future long-term housing stability for vulnerable Oregonians.
- **Affordable Rental Housing.** *Work to close the affordable rental housing gap and reduce housing cost burden for low-income Oregonians.*
 - Summary of the issue: Statewide, over 85,000 new units are needed to house those households earning below 30% of Median Family Income (MFI) in units affordable to them. The gap is even larger when accounting for the more than 16,000 units affordable at 30% of MFI, which are occupied by households at other income levels.
 - 2019-2023 Goal: OHCS will triple the existing pipeline of affordable rental housing — up to 25,000 homes in the development pipeline by 2023. Residents of affordable rental housing funded by OHCS will have reduced cost burden and more opportunities for prosperity and self-sufficiency.
- **Homeownership.** *Provide more low- and moderate-income Oregonians with the tools to successfully achieve and maintain homeownership, particularly in communities of color.*
 - Summary of the issue: In Oregon, homeownership rates for all categories of people of color are lower than for white Oregonians. For White non-Latinx Oregonians, the home ownership rate is 63%. For Latinx and non-White Oregonians, it is 42%. For many, homeownership rates have fallen between 2005 and 2016.
 - 2019-2023 Goal: OHCS will assist at least 6,500 households in becoming successful homeowners through mortgage lending products while sustaining efforts to help existing homeowners retain their homes. OHCS will increase the number of homebuyers of color in our homeownership programs by 50% as part of a concerted effort to bridge the homeownership gap for communities of color while building pathways to prosperity.
- **Rural Communities.** *Change the way OHCS does business in small towns and rural communities to be responsive to the unique housing and service needs and unlock the opportunities for housing development.*

- **Summary of the issue:** While housing costs may be lower in rural areas, incomes are lower as well: median family income is \$42,750 for rural counties versus \$54,420 for urban counties. Additionally, the median home values in rural Oregon are 30% higher than in the rural United States and median rents are 16% higher.
- **2019-2023 Goal:** OHCS will collaborate with small towns and rural communities to increase the supply of affordable and market-rate housing. As a result of tailored services, partnerships among housing and service providers, private industry and local governments will flourish, leading to improved capacity, leveraging of resources and a doubling of the housing development pipeline.

Regional and Local Demographic Trends that may affect housing need in Tualatin.

Demographic trends that might affect the key assumptions used in the baseline analysis of housing need are: (1) the aging population, (2) changes in household size and composition, and (3) increases in diversity.

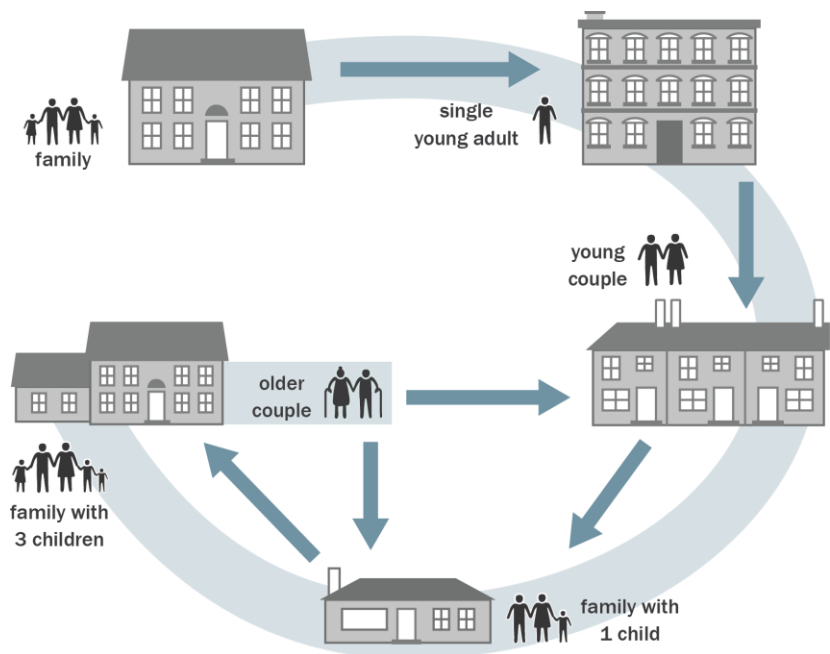
An individual’s housing needs change throughout their life, with changes in income, family composition, and age. The types of housing needed by a 20-year-old college student differ from the needs of a 40-year-old parent with children, or an 80-year-old single adult. As Tualatin’s population ages, different types of housing will be needed to accommodate older residents. The housing characteristics by age data below reveal this cycle in action in Tualatin.

Housing needs and preferences change in predictable ways over time, such as with changes in marital status and size of family.

Families of different sizes need different types of housing.

Exhibit 29. Effect of demographic changes on housing need

Source: ECONorthwest, adapted from Clark, William A.V. and Frans M. Dieleman. 1996. Households and Housing. New Brunswick, NJ: Center for Urban Policy Research.



Growing Population

Tualatin’s population growth will drive future demand for housing in the City over the planning period. The population forecast in Exhibit 31 is Tualatin’s official population forecast, from the Oregon Population Forecast Program. Tualatin must use this forecast as the basis for forecasting housing growth over the 2020 to 2040 period.

Tualatin’s population grew by 81% between 1990 and the 2013-2017 period. Tualatin added 12,122 new residents, at an average annual growth rate of 2.2%.

Exhibit 30. Population Growth and Change, Tualatin, Washington County, Portland Region, Oregon, and the United States, 1990, 2000, 2010, and 2018

Source: U.S. Decennial Census 1990, 2000, 2010, and 2018 Quick Facts. Portland State University 2018 Certified Population Estimates. Note: the Portland Region is the aggregate of Clackamas, Multnomah, and Washington Counties.

	1990	2000	2010	2018	Change 1990 to 2018		
					Number	Percent	AAGR
U.S.	248,709,873	281,421,906	308,745,538	327,167,434	78,457,561	32%	1.0%
Oregon	2,842,321	3,421,399	3,831,074	4,195,300	1,352,979	48%	1.5%
Portland Region	1,174,291	1,444,219	1,641,036	1,839,005	664,714	57%	1.7%
Washington County	311,554	445,342	529,710	606,280	294,726	95%	2.5%
Tualatin	15,013	22,791	26,054	27,055	12,042	80%	2.2%

Tualatin city limits is projected to grow by 627 people between 2020 and 2040, at an average annual growth rate of 0.12%.²⁶

Exhibit 31. Forecast of Population Growth, Tualatin city limits, 2020 to 2040

Source: Metro 2040 Population Distributed Forecast, Exhibit A. July 12, 2016.

26,745	27,372	627	2.3% increase
Residents in 2020	Residents in 2040	New residents 2020 to 2040	0.12% Growth Rate

Tualatin’s Basalt Creek is project to grow by 1,080 people between 2020 and 2040, at an average annual growth rate of 5.68%.²⁷

Exhibit 32. Forecast of Population Growth, Basalt Creek, 2020 to 2040

Source: Metro 2040 TAZ Forecast, Population Estimates (TAZ 980 and 981). November 6, 2015.

535	1,616	1,080	202% increase
Residents in 2020	Residents in 2040	New residents 2020 to 2040	5.68% Growth Rate

²⁶ This forecast of population growth is based on Tualatin’s (city limits) official population forecast from Metro 2040 Population Distributed Forecast (2016). ECONorthwest extrapolated the population forecast for 2015 (to 2020) using an average annual growth rate.

²⁷ This forecast of population growth is based on Basalt Creek’s official population forecast from Metro 2040 TAZ Population Forecast (2015). ECONorthwest extrapolated the population forecast for 2015 (to 2020) using an average annual growth rate.

Aging Population

This section shows two key characteristics of Tualatin’s population, with implications for future housing demand in Tualatin:

- **Seniors.** Tualatin currently has a smaller share of people over 60 years old than Washington County. As Tualatin’s senior population grows, it will have increasing demand for housing that is suitable for older demographics.

Demand for housing for seniors will grow over the planning period, as the Baby Boomers continue to age and retire. The Washington County forecast share of residents aged 60 years and older will account for 24% of its population in 2040, compared to around 18% in the 2013-2017 period.

The impact of growth in seniors in Tualatin will depend, in part, on whether older people already living in Tualatin continue to reside there as they retire. National surveys show that, in general, most retirees prefer to age in place by continuing to live in their current home and community as long as possible.²⁸ Tualatin may be attractive to newly retiring seniors because of its location within the Portland Metro region.

Growth in the number of seniors will result in demand for housing types specific to seniors, such as small and easy-to-maintain dwellings, assisted living facilities, or age-restricted developments. Senior households will make a variety of housing choices, including: remaining in their homes as long as they are able, downsizing to smaller single-family homes (detached and attached) or multifamily units, moving in with family, or moving into group housing (such as assisted living facilities or nursing homes), as their health declines. The challenges aging seniors face in continuing to live in their community include changes in healthcare needs, loss of mobility, the difficulty of home maintenance, financial concerns, and increases in property taxes.²⁹

- **Tualatin has a slightly larger share of younger people than the Portland Region.** About 26% of Tualatin’s population and Washington County’s population is under 20 years old, compared to 24% of the Portland Region’s population. The forecast for population growth in Washington County shows the percent of people under 20 years staying static at 24% of the population in 2013-2017 to 2040.

People currently aged 20 to 40 are referred to as the Millennial generation and account for the largest share of population in Oregon.³⁰ By 2040, they will be about 40 to 60 years of age. The forecast for Washington County shows a slight shift in Millennials from about 29% of the population in 2020 to about 25% of the population in 2040.

²⁸ A survey conducted by the AARP indicates that 90% of people 50 years and older want to stay in their current home and community as they age. See <http://www.aarp.org/research>.

²⁹ “Aging in Place: A toolkit for Local Governments” by M. Scott Ball.

³⁰ Pew Research Center. (March 2018). “Defining generations: Where Millennials end and post-Millennials begin” by Michael Dimock. Retrieved from: <http://www.pewresearch.org/fact-tank/2018/03/01/defining-generations-where-millennials-end-and-post-millennials-begin/>.

Tualatin's ability to attract people in this age group will depend, in large part, on whether the city has opportunities for housing that both appeals to and is affordable to Millennials. Again, Tualatin is attractive because of the amenities of the Portland Metro region.

The long-term housing preference of Millennials is uncertain. Research suggests that Millennials' housing preferences may be similar to the Baby Boomers, with a preference for smaller, less costly units. Recent surveys about housing preference suggest that Millennials want affordable single-family homes in areas that offer transportation alternatives to cars, such as suburbs or small cities with walkable neighborhoods.³¹

A recent survey of people living in the Portland region shows that Millennials prefer single-family detached housing. The survey finds that housing price is the most important factor in choosing housing for younger residents.³² The survey results suggest Millennials are more likely than other groups to prefer housing in an urban neighborhood or town center.

Growth in Millennials in Tualatin will result in increased demand for both affordable single-family detached housing (such as small single-family detached units like cottages), as well as increased demand for affordable townhouses and multifamily housing. Growth in this population will result in increased demand for both ownership and rental opportunities, with an emphasis on housing that is comparatively affordable.

³¹ The American Planning Association, "Investing in Place; Two generations' view on the future of communities." 2014.

"Access to Public Transportation a Top Criterion for Millennials When Deciding Where to Live, New Survey Shows," Transportation for America.

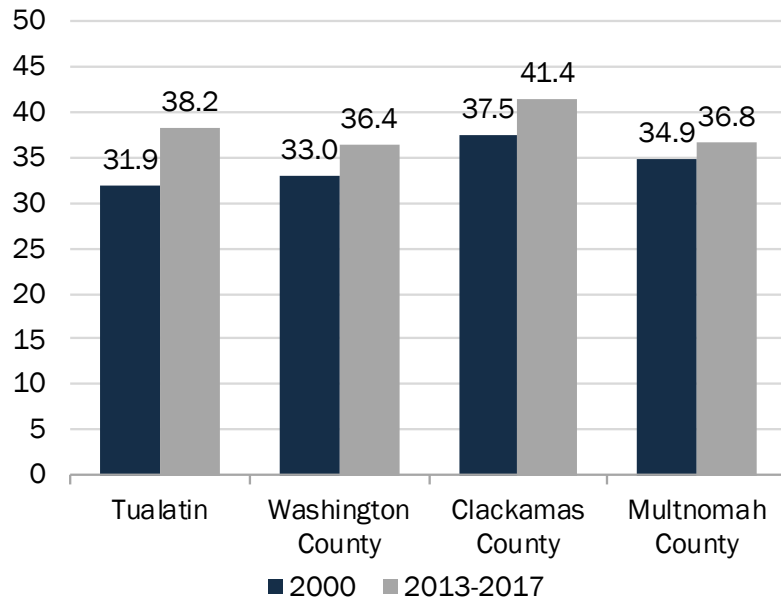
"Survey Says: Home Trends and Buyer Preferences," National Association of Home Builders International Builders

³² Davis, Hibbits, & Midghal Research, "Metro Residential Preference Survey," May 2014.

From 2000 to 2013-2017, Tualatin's population grew older on average.

Exhibit 33. Median Age, Tualatin, Washington County, Clackamas County, and Multnomah County, 2000 and 2013-2017

Source: U.S. Census Bureau, 2000 Decennial Census Table B01002, 2013-2017 ACS, Table B01002.

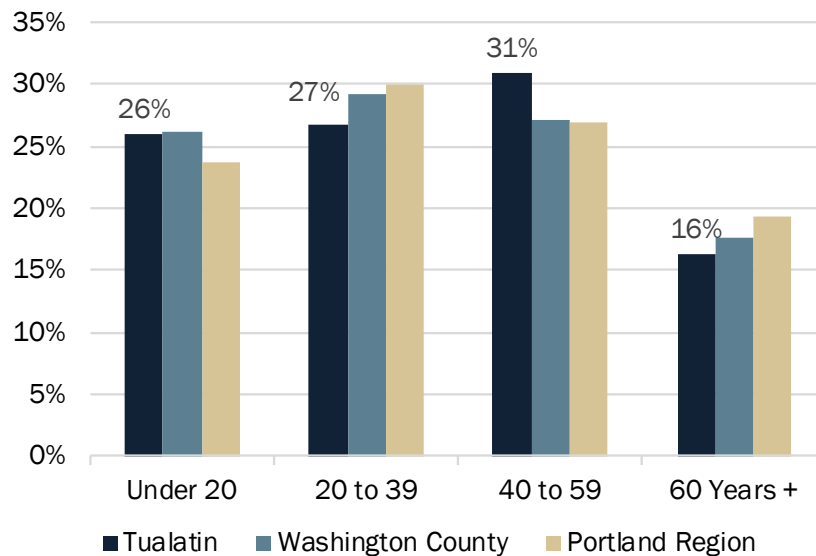


In the 2013-2017 period, about 58% of Tualatin's residents were between the ages of 20 and 59 years.

Tualatin had a slightly smaller share of people over the age of 60 than Washington County and Portland Region.

Exhibit 34. Population Distribution by Age, Tualatin, Washington County, and Portland Region, 2013-2017

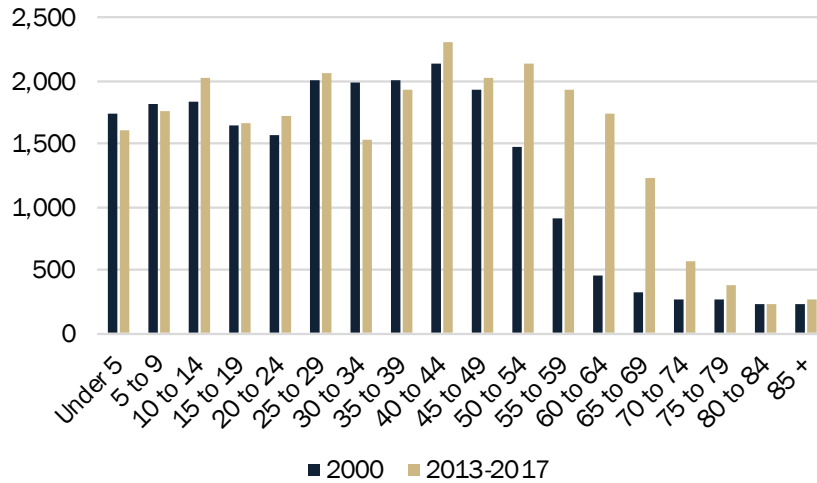
Source: U.S. Census Bureau, 2013-2017 ACS, Table B01001.



The number of senior residents in Tualatin grew between 2000 and the 2013-2017 period.

Exhibit 35. Population Distribution by Age, Tualatin, 2013-2017

Source: U.S. Census Bureau, 2000 Decennial Census Table P012 and 2013-2017 ACS, Table B01001.



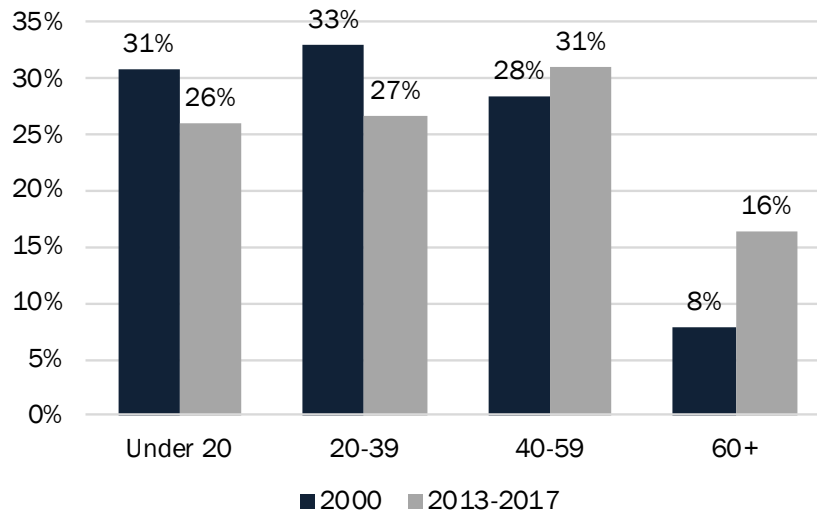
Between 2000 and 2013-2017, the share of Tualatin’s population aged 60 years and older doubled.

Tualatin’s population aged 60 years and older grew by 2,643 people between 2000 and 2013-2017.

This increase can be explained in part through aging of the Baby Boomers across the Portland Region. Development of senior housing in Tualatin likely attracted seniors to Tualatin, increasing the percentage of people over 60 years old in the city.

Exhibit 36. Population Composition by Age, Tualatin, 2000 and 2013-2017

Source: U.S. Census Bureau, 2000 Decennial Census Table P012 and 2013-2017 ACS, Table B01001.



Between 2020 and 2040, Washington County’s population over 60 years old is forecast to grow the fastest, by 62%.

Exhibit 37. Fastest-growing Age Groups, Washington County, 2020 to 2040

Source: Portland State University, Population Research Center, Washington County Forecast, June 2017.

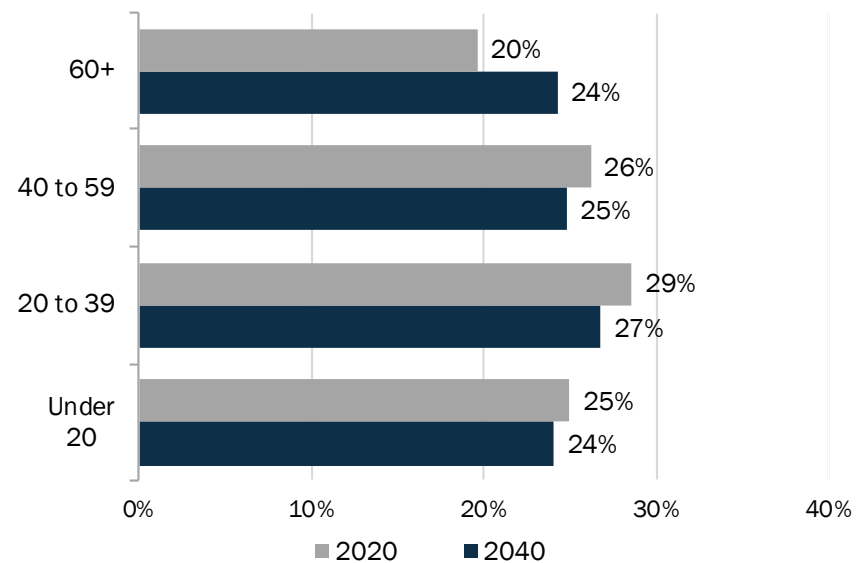
23%	23%	24%	62%
36,773	40,023	38,953	75,217
People	People	People	People
Under 20	20-39 Yrs	40-59 Yrs	60+ Yrs

Between 2020 and 2040, the share of Washington County residents over the age of 40 will make up 49% of the county's total population.

Of the age cohorts shown in Exhibit 38, the share of residents over 60 years of age will increase by 2040, while the share of all other age cohorts will decrease.

Exhibit 38. Population Growth by Age Group, Washington County, 2020 to 2040

Source: Portland State University, Population Research Center, Washington County Forecast, June 2017.



Increased Ethnic Diversity

Tualatin is becoming more ethnically diverse. The Latinx population grew from 12% of Tualatin's population in 2000 to 16% of the population in the 2013-2017 period, adding about 1,774 new Latinx residents. Tualatin is more ethnically diverse than the Portland Region.

The U.S. Census Bureau forecasts that at the national level, the Latinx population will continue growing faster than most other non-Latinx population between 2020 and 2040. The Census forecasts that the Latinx population will increase 93% from 2016 to 2060 and foreign-born Latinx population will increase by about 40% in that same time.³³

Continued growth in the Latinx population will affect Tualatin's housing needs in a variety of ways.³⁴ Growth in first and, to a lesser extent, second and third generation Latinx immigrants, will increase demand for larger dwelling units to accommodate the, on average, larger household sizes for these households. Foreign-born households, including Latinx immigrants, are more likely to include multiple generations, requiring more space than smaller household

³³ U.S. Census Bureau, *Demographic Turning Points for the United States: Population Projections for 2020 to 2060*, pg. 7, https://www.census.gov/content/dam/Census/library/publications/2018/demo/P25_1144.pdf

³⁴ Pew Research Center. *Second-Generation Americans: A Portrait of the Adult Children of Immigrants*, February 7, 2013, Appendix 8, <http://www.pewsocialtrends.org/2013/02/07/appendix-1-detailed-demographic-tables/>. National Association of Hispanic Real Estate Professionals. *2017 State of Hispanic Homeownership Report*, 2017.

sizes. As Latinx households integrate over generations, household size typically decreases, and housing needs become similar to housing needs for all households.

According to the *State of Hispanic Homeownership* report from the National Association of Hispanic Real Estate Professionals³⁵, Latinx accounted for 28.6% of the nation’s household formation in 2017. Household formations, for Latinx homeowners specifically, accounted for 15% of the nation’s net homeownership growth. The rate of homeownership for Latinx increased from 45.4% in 2014³⁶ to 46.2% in 2017. The only demographic that increased their rate of homeownership from 2016 to 2017 was for Latinx households.

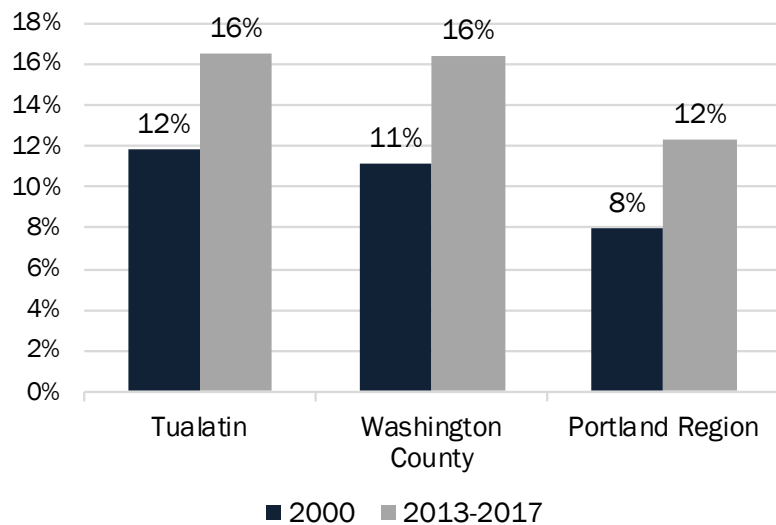
The *State of Hispanic Homeownership* report also cites the lack of affordable housing products as a substantial barrier to homeownership. The report finds that Latinx households are more likely than non-Latinx households to be nuclear households, comprised of married couples with children, and multiple-generation households in the same home, such as parents and adult children living together. These housing preferences—affordability and larger household size—will influence the housing market as the Latinx population continues to grow.³⁷ Accordingly, growth in Latinx households will result in increased demand for housing of all types, both for ownership and rentals, with an emphasis on housing that is comparatively affordable.

The share of Tualatin’s population that is Latinx increased by 4% (1,774 people) from 2000 to 2013-2017.

Tualatin was more ethnically diverse than the Portland Region.

Exhibit 39. Latinx Population as a Percent of the Total Population, Tualatin, Washington County, Portland Region, 2000, 2013-2017

Source: U.S. Census Bureau, 2000 Decennial Census Table P008, 2013-2017 ACS Table B03002.



³⁵ National Association of Hispanic Real Estate Professionals (2017). *2017 State of Hispanic Homeownership Report*.

³⁶ Ibid.

³⁷ Ibid.

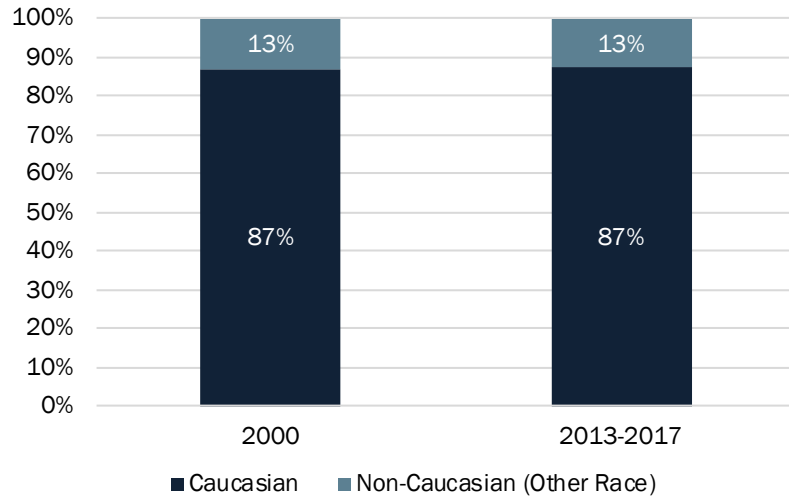
Racial Diversity³⁸

The non-Caucasian population is defined as the share of the population that identifies as a race other than “White alone” according to Census definitions. Racial diversity in Tualatin did not increase between 2000 and the 2013-2017 period and. In the 2013-2017 period, Tualatin was less racially diverse than both the county and region.

The share of the non-white population in Tualatin stayed the same from 2000 to 2013-2017.

Exhibit 40. Non-Caucasian Population as a Percent of Total Population, Tualatin, 2000 and 2013-2017

Source: U.S. Census Bureau, 2000 Decennial Census Table P008, 2013-2017 ACS Table B02001.

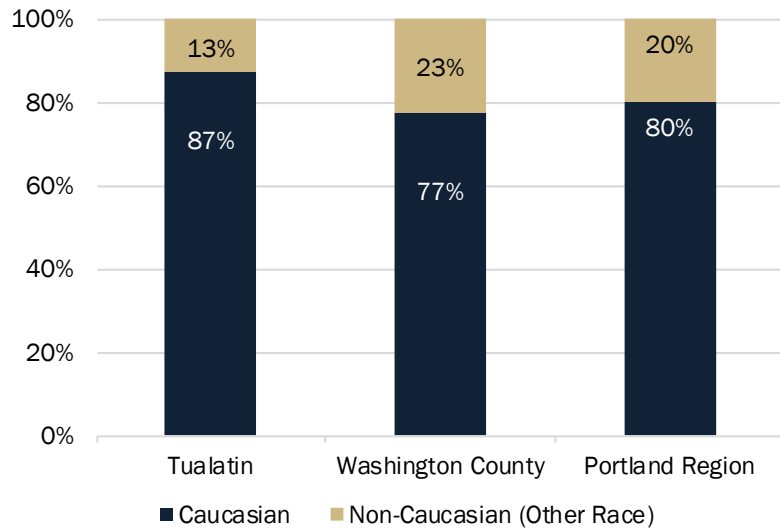


³⁸ The US Census Bureau considers race and ethnicity as two distinct concepts. The Census applies two categories for ethnicity, which are Hispanic or Latino (i.e., Latinx) and Not Hispanic or Latino (i.e., Non-Latinx). Latinx is an ethnicity and not a race, meaning individuals who identify as Latinx may be of any race. The share of the population that identifies as Latinx should not be added to percentages for racial categories.

In the 2013-2017 period, Tualatin was less racially diverse than Washington County and the Portland Region.

Exhibit 41. Non-Caucasian Population as a Percent of Total Population, Tualatin, Washington County, and the Portland Region 2013-2017

Source: U.S. Census Bureau, 2013-2017 ACS Table B02001.



Homelessness

Washington County's point-in-time homeless count decreased by about 4% (22 people) from 2017 to 2018.

Between 2015 and 2018, individuals who were homeless (and sheltered) decreased 17%. Individuals who were homeless (and unsheltered) decreased 9%.

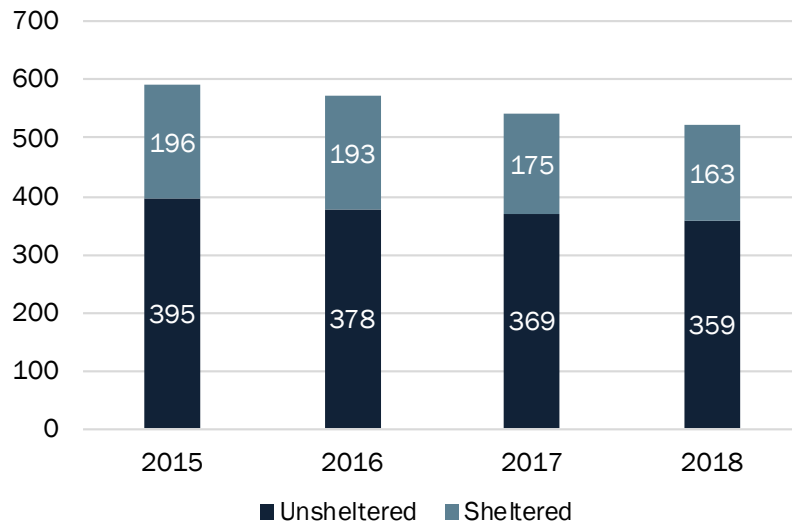
Exhibit 42. Number of Persons Homeless, Washington County, Point-in-Time Count, 2017 and 2018

Source: Washington County, Point in Time Count, January 2017, 2018

544 Persons **522 Persons**
2017 2018

Exhibit 43. Number of Persons Homeless by Living Situation, Washington County, Point-in-Time Count, 2015 through 2018

Source: Washington County, Point in Time Count, January 2015, 2016, 2017, 2018



Household Size and Composition

Tualatin’s households are smaller than Washington County’s households. Tualatin’s household composition shows that households in Tualatin are similar to Washington County and Portland Region averages.

Tualatin’s average household size was smaller than Washington County’s and Clackamas County’s, but larger than Multnomah County’s.

Exhibit 44. Average Household Size, Tualatin, Washington County, Clackamas County, Multnomah County, 2013-2017

Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B25010.



According to the two most recent Decennial Censuses, Tualatin’s average household size (for householder identifying as Latinx) decreased by 0.27 person.

Exhibit 45. Average Household Size for Latinx Householder, Tualatin, 2000 and 2010

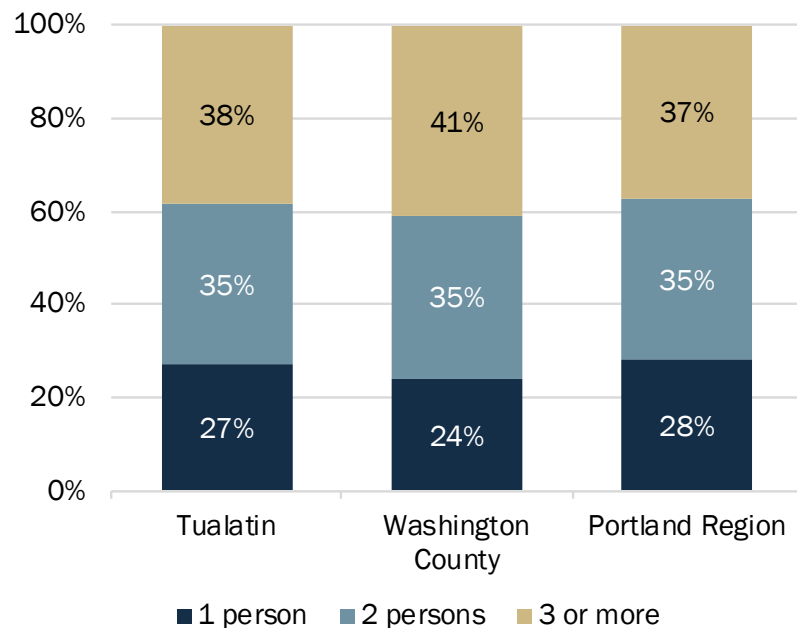
Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B25010.



About 62% of Tualatin’s households were 1- or 2-person households, compared to 59% of Washington County’s and 63% of the Portland Region’s households.

Exhibit 46. Household Size, Tualatin, Washington County, and Portland Region, 2013-2017

Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B25010.

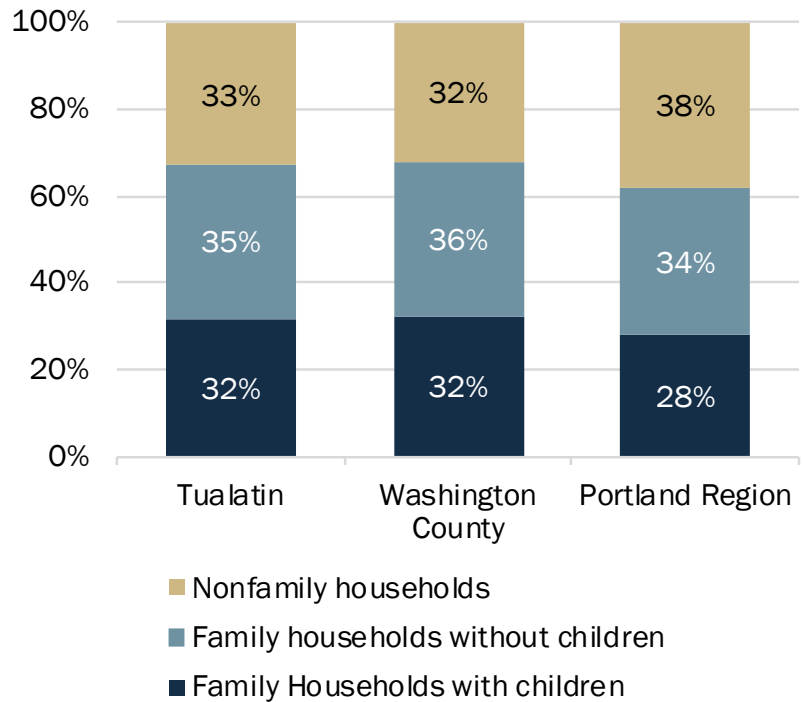


Tualatin had a similar household composition to Washington County. Compared to the Portland Region, Tualatin had a smaller share of nonfamily households and a larger share of family households with children.

About a third of Tualatin's households were non-family households (i.e. 1-person households and households composed of roommates).

Exhibit 47. Household Composition, Tualatin, Washington County, and Portland Region, 2013-2017

Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table DP02.



Households, with a Latinx head of household, were more likely to have more than one occupant per room in the 2013-2017 period, compared to all households and households with a Caucasian head of household.

Exhibit 48. Occupants per Room, Tualatin, 2013-2017

Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B25014.

2.2%

All Households

1.8%

Households, with White (alone) head of household

11.3%

Households, with Latinx head of household

Income of Tualatin Residents

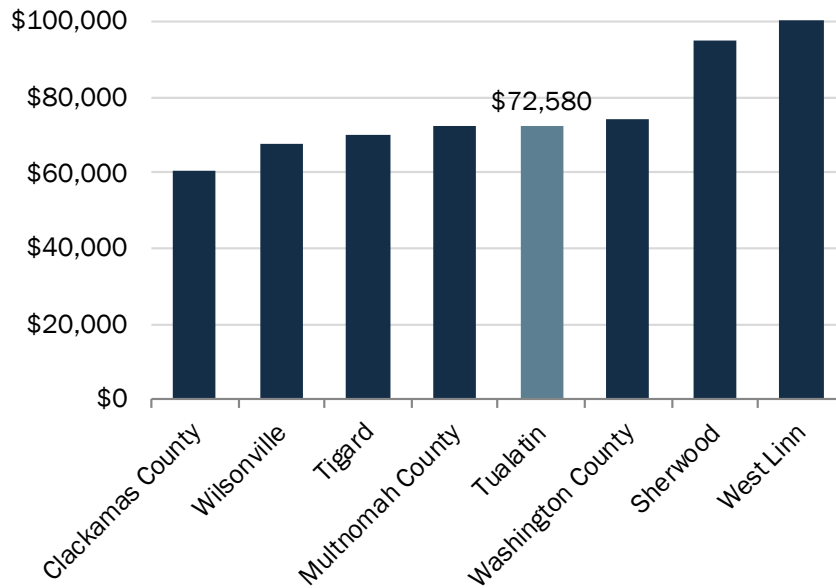
Income is one of the key determinants in housing choice and households' ability to afford housing. Income for residents living in Tualatin was lower than the Washington County median income and the state's.

Over the 2013-2017 period, Tualatin's median household income (MHI) was below that of Washington County's.

Tualatin's MHI was \$1,453 lower than Washington County's MHI (\$74,033).

Exhibit 49. Median Household Income, Tualatin, Washington County, and Comparison regions, 2013-2017

Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B25119.



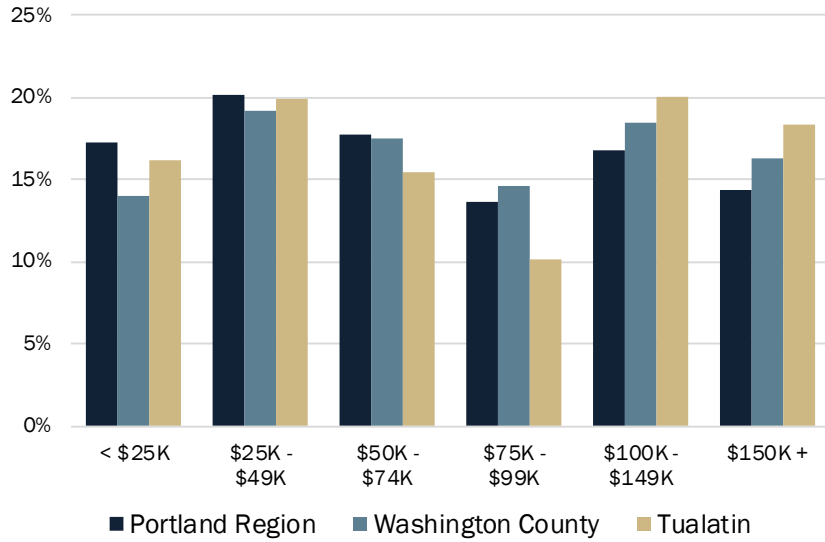
Tualatin had a larger share of higher-earning households.

About 38% of Tualatin’s households earned more than \$100,000 per year, compared to 35% of Washington County households and 31% of the Portland Region’s households.

About 36% of Tualatin’s households earned \$50,000 or less per year, compared to 33% of Washington County’s households and 37% of the Portland Region’s households.

Exhibit 50. Household Income, Tualatin, Washington County, and Portland Region, 2013-2017

Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B19001.

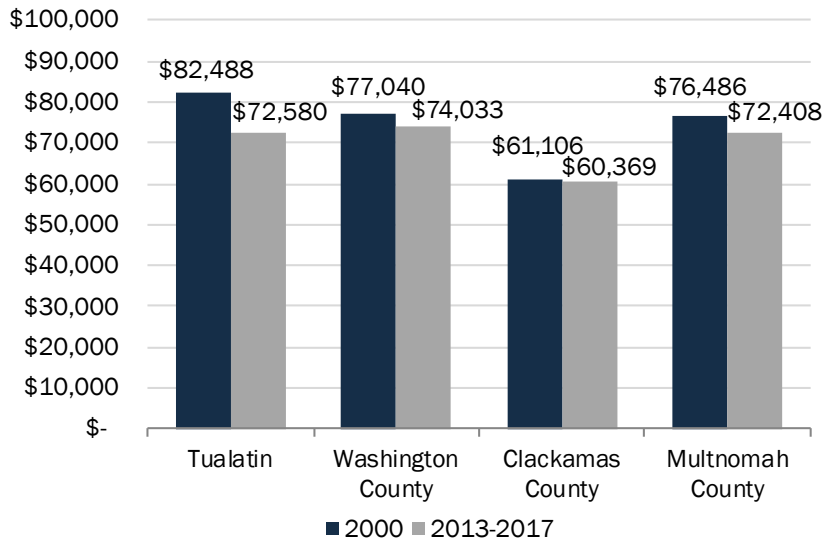


After adjusting for inflation, Tualatin’s median household income (MHI) decreased by 12%, from \$82,488 in 2000 to \$72,580 in 2013-2017.

In this same time, Washington County’s MHI decreased by 4%, Clackamas County’s MHI decreased by 1%, and Multnomah County’s MHI decreased by 5%.

Exhibit 51. Change in Median Household Income (Inflation-adjusted 2017 dollars), Tualatin, Washington County, Clackamas County, and Multnomah County, 2000 and 2013-2017

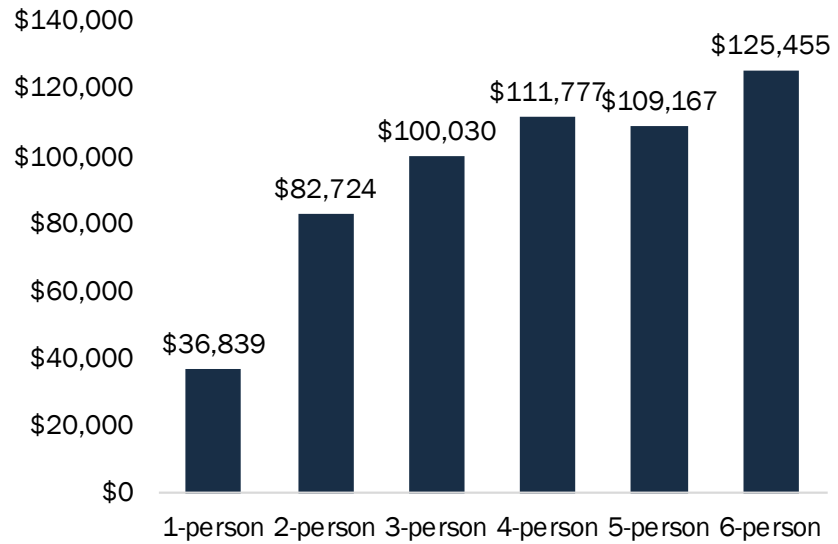
Source: U.S. Census Bureau, 2000 Decennial Census, Table HCT012; 2013-2017 ACS 5-year estimate, Table B25119; Bureau of Labor Statistics Inflation Calculator.



The median household income for a 4-person household was 3x the median household income for a 1-person household.

Exhibit 52. Median Household Income by Household Size, Tualatin, 2013-2017

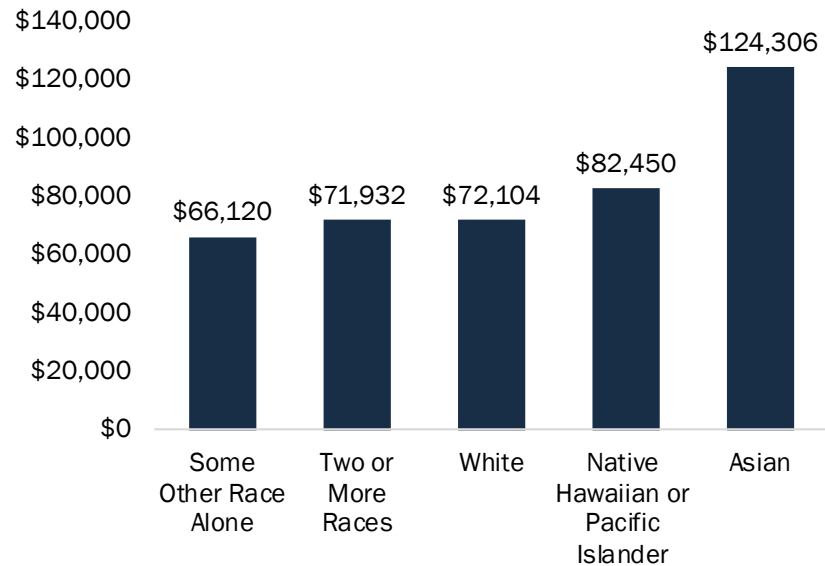
Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B25119.



Median household income, of households with an Asian head of household, were proportionately higher in Tualatin.

Exhibit 53. Median Household Income by Race of the Head of Household, Tualatin, 2013-2017

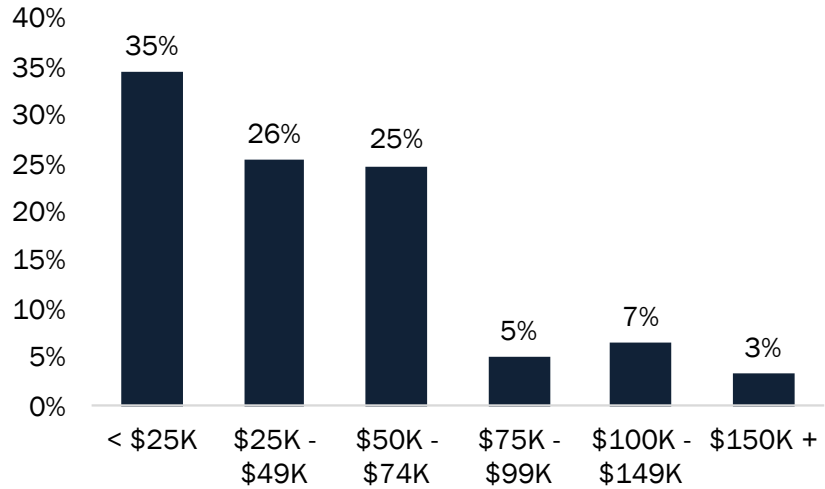
Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B19013A-G. Note: data was not available for heads of households identifying as a Black / African American or as American Indian and Alaska Native.



Most households with a Latinx head of household earned less than \$50,000 per year.

Exhibit 54. Household Income by Latinx Head of Household, Tualatin, 2013-2017

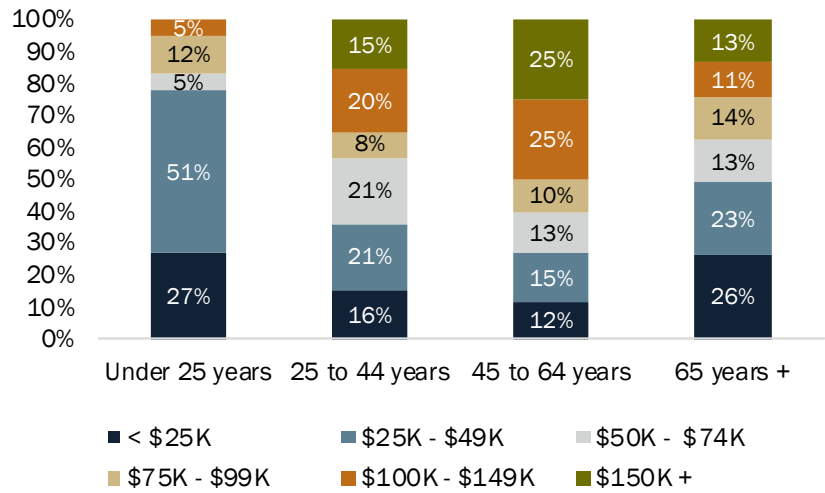
Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B19001I.



In the 2013-2017 period, 78% of households with a householder 25 and younger and 49% of households with a householder 65 years and older earned less than \$50,000 per year.

Exhibit 55. Household Income by Age of Householder, Tualatin, 2013-2017

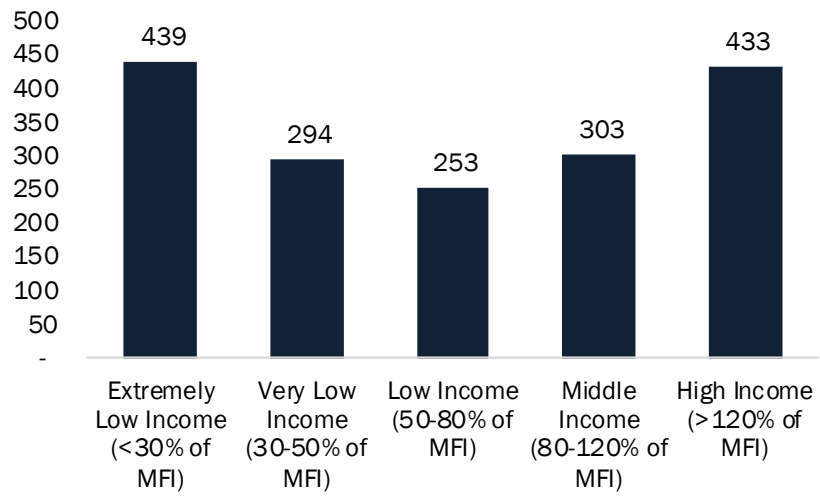
Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B19037.



About a quarter of households with a householder aged 65 years and older) were extremely low income in the 2013-2017 period. About a quarter of those households were high income.

Exhibit 56. Median Family Income (\$81,400) by Age of Householder (Aged 65 Years and Older), Tualatin, 2013-2017

Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table XXXX. Note: Median Family Income for Washington County was \$81,400 (U.S. Department of Housing and Urban Development).



Commuting Trends

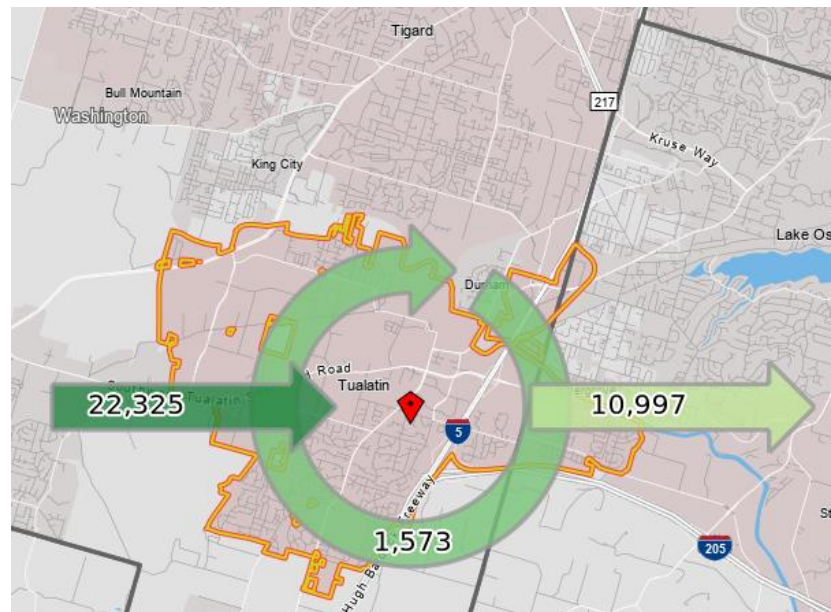
Tualatin is part of the complex, interconnected economy of the Portland Region. Of the more than 23,800 people who work in Tualatin, 93% of workers commute into Tualatin from other areas, most notably Portland, Tigard, Beaverton, and Hillsboro. Almost 11,000 residents of Tualatin commute out of the city for work, many of them to Portland.

Tualatin is part of an interconnected regional economy.

More than 22,000 people commuted into Tualatin for work, and nearly 11,000 people living in Tualatin commuted out of the city for work.

Exhibit 57. Commuting Flows, Tualatin, 2015

Source: U.S. Census Bureau, Census On the Map.



About 7% of people who worked at businesses located in Tualatin also lived in Tualatin.

The remainder commuted from Portland and other parts of the Region.

Exhibit 58. Places Where Workers at Businesses in Tualatin Live, 2015

Source: U.S. Census Bureau, Census On the Map.



About 27% of Tualatin residents worked in Portland.

A little over 12% of Tualatin residents lived and worked in Tualatin.

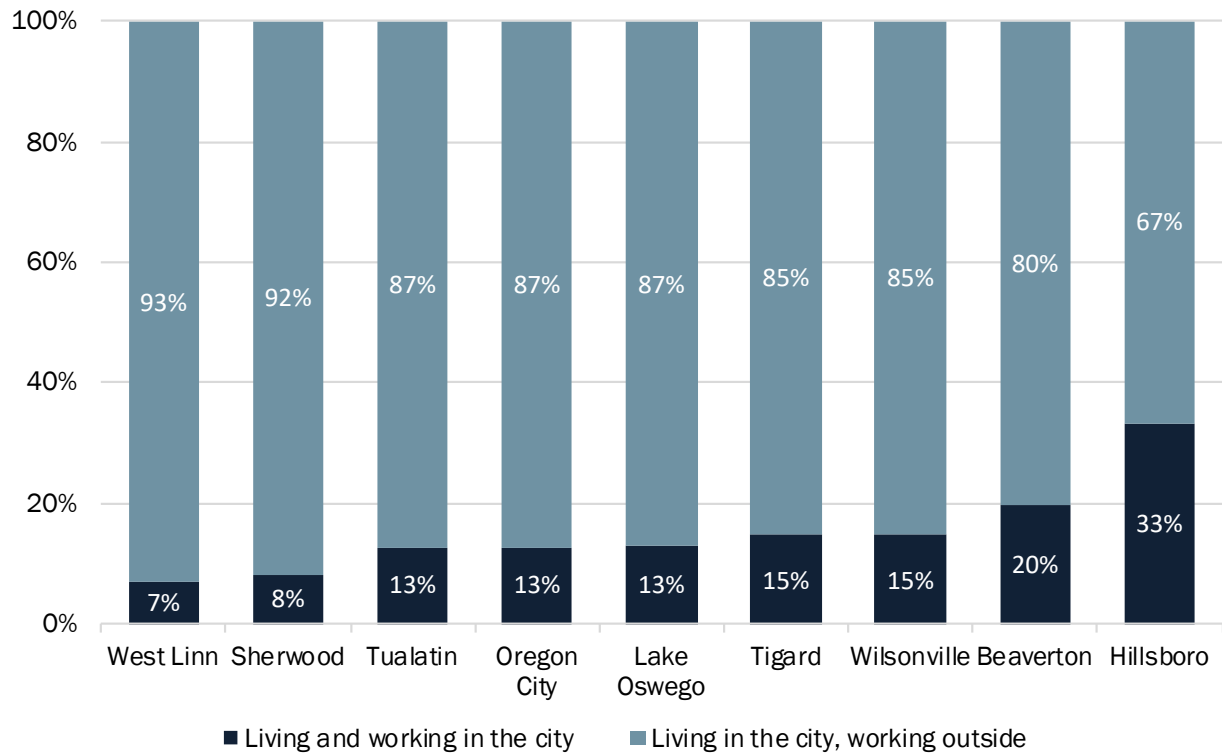
Exhibit 59. Places Where Tualatin Residents were Employed, 2015

Source: U.S. Census Bureau, Census On the Map.



Exhibit 60. Commuting Flows of Residents, Tualatin Relative to Comparison Geographies, 2015

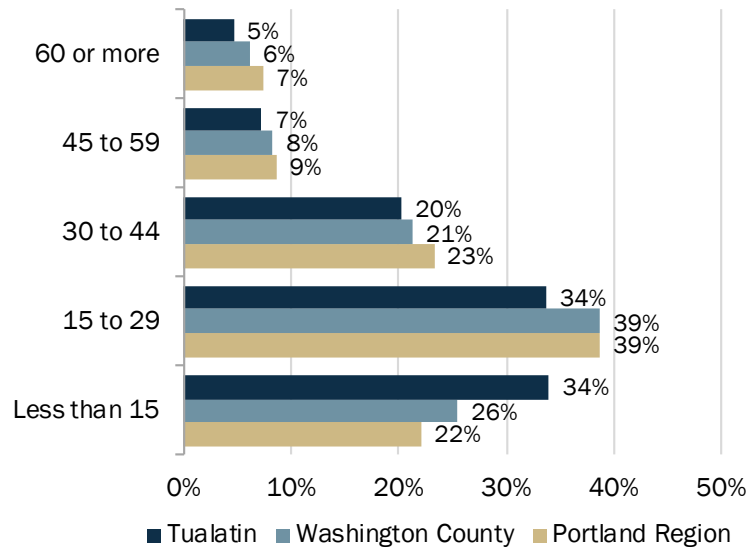
Source: U.S. Census Bureau, Census On the Map.



Most of Tualatin residents (68%) had a commute time that took less than 30 minutes.

Exhibit 61. Commute Time by Place of Residence, Tualatin, Washington County, and Portland Region, 2013-2017

Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B08303.



Regional and Local Trends Affecting Affordability in Tualatin

This section describes changes in sales prices, rents, and housing affordability in Tualatin. It uses cities in the region, as well as Washington County and Oregon, as comparisons.

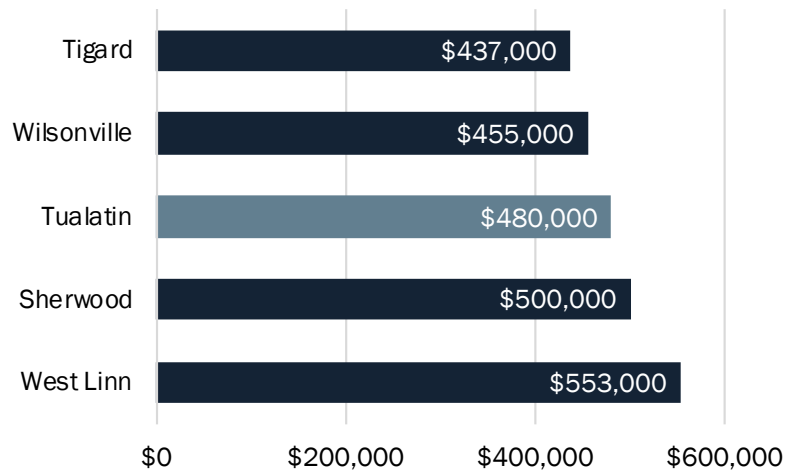
Changes in Housing Costs

With a median sale price of \$480,000 in February 2019, Tualatin’s housing sales were slightly higher than some comparison cities in this analysis, but below sale prices of other cities. Tualatin’s housing prices grew along with comparison cities over the January 2015 to February 2019 analysis period.

Tualatin’s median home sale price was within range of comparison cities.

Exhibit 62. Median Home Sale Price, Tualatin and Comparison Cities, February 2019

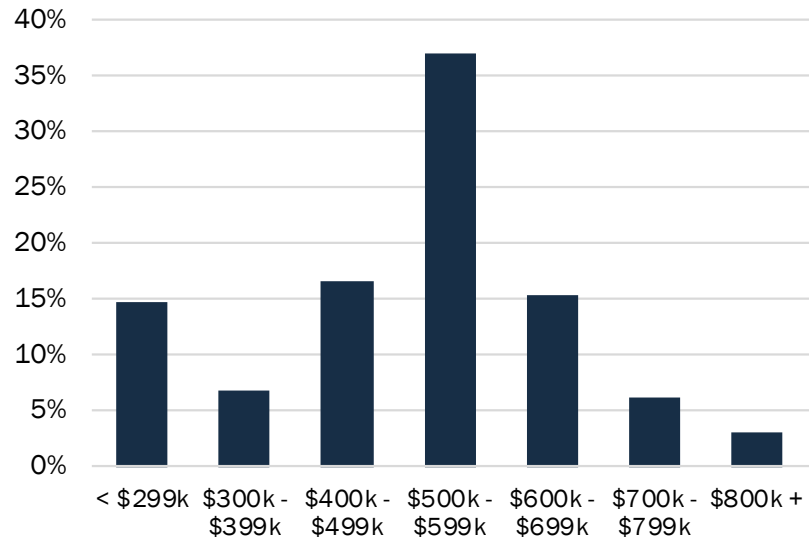
Source: Redfin.



In 2017 through 2018, more than half of the homes (62%) in Tualatin sold for more than \$500,000.

Exhibit 63. Distribution of Home Sale Prices, Tualatin, 2017–2018

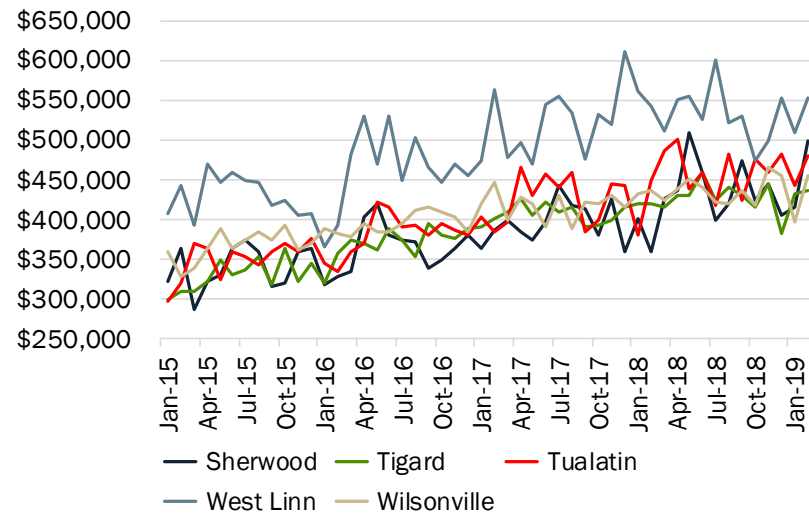
Source: RLIS.



Between January 2015 and February 2019, home sale prices in Tualatin followed similar trends to other nearby cities (with West Linn as an outlier).

Exhibit 64. Median Sale Price, Tualatin and Comparison Cities, January 2016–February 2019

Source: Redfin.



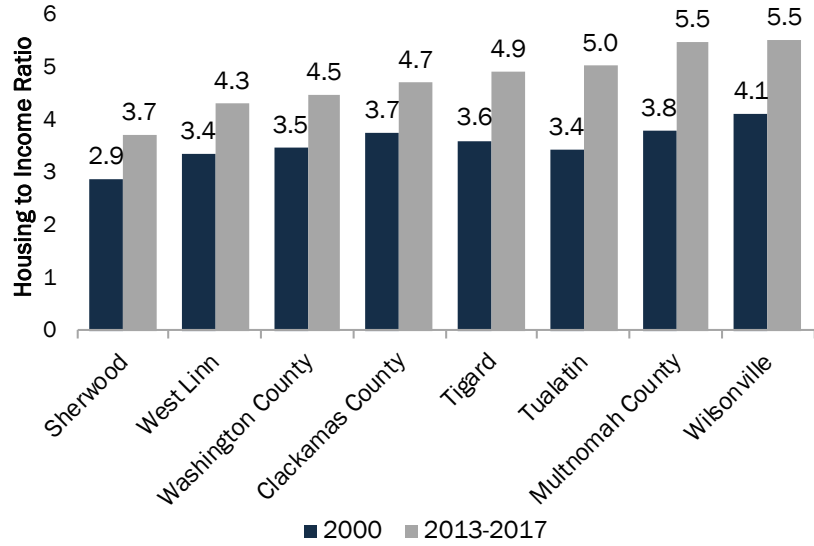
Since 2000, housing costs in Tualatin increased faster than incomes.

The household reported median value of a house in Tualatin was 3.4 times the median household income (MHI) in 2000 and 5.0 times MHI in 2016.

The decline of housing affordability was more extreme than in Washington County overall.

Exhibit 65. Ratio of Median Housing Value to Median Household Income, Tualatin, Washington County, and Comparison Jurisdictions, 2000 to 2013–2017³⁹

Source: U.S. Census Bureau, 2000 Decennial Census, Tables HCT012 and H085, and 2012–2016 ACS, Tables B19013 and B25077.



³⁹ This ratio compares the median value of housing in Tualatin (and other places) to the median household income. Inflation-adjusted median owner values in Tualatin increased from \$282,532 in 2000 to \$365,700 in 2013–2017. Over the same period, inflation-adjusted median income decreased from \$82,488 to \$72,580.

Rental Costs

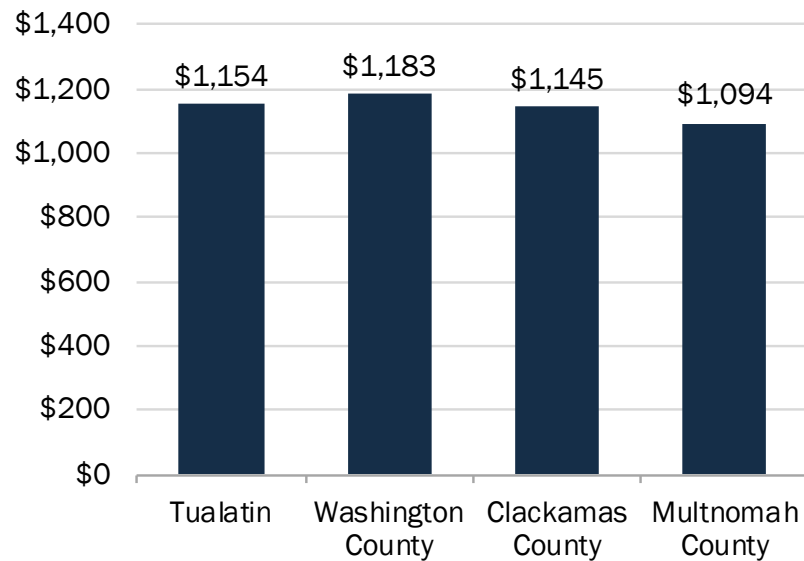
Median multifamily rents in Tualatin and Washington County are about \$1,200. The following charts show gross rent (which includes the cost of rent plus utilities) for Tualatin in comparison to Washington County and the Portland Region.

The median gross rent in Tualatin was \$1,154 in the 2013-2017 period.

Rent in Tualatin was comparable to that of comparison regions.

Exhibit 66. Median Gross Rent, Tualatin, Washington County, Clackamas County, and Multnomah County, 2013-2017

Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B25064.

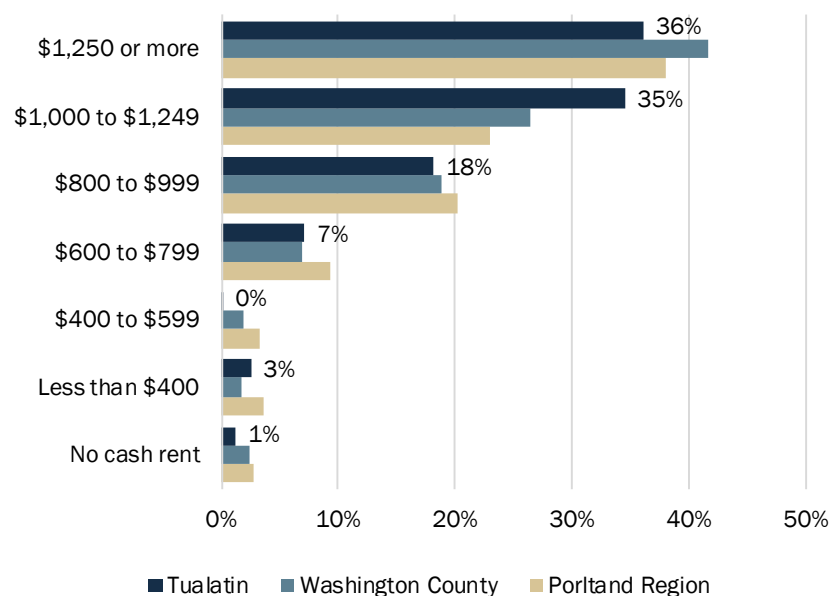


Most renters in Tualatin paid more than \$1,000 per month in rent.

About 36% of Tualatin's renters paid \$1,250 or more in gross rent per month, a smaller share than renters across Washington County (42%) and the Portland Region (38%).

Exhibit 67. Gross Rent, Tualatin, Washington County, and Portland Region, 2013-2017

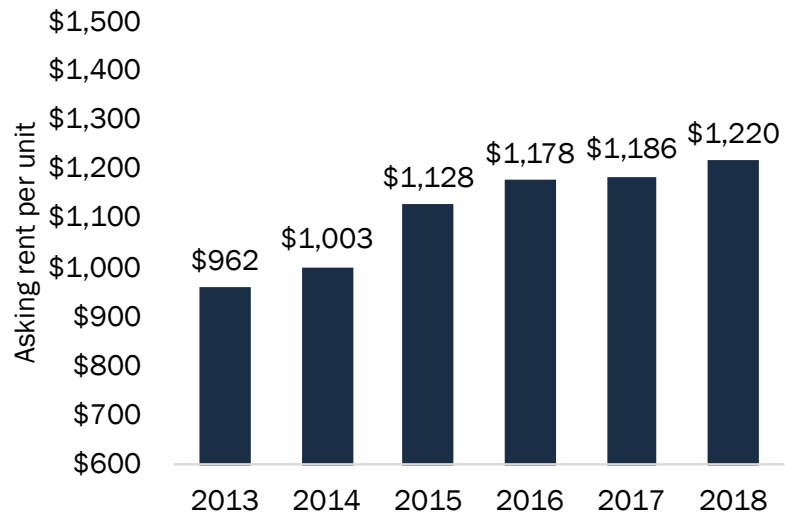
Source: U.S. Census Bureau, 2013-2017 ACS Table B25063.



Tualatin's average asking multifamily rent per unit increased by \$372, from \$848 in 2010 to \$1,220 in 2018.

Exhibit 68. Average Asking Multifamily Rent Per Unit, Tualatin, 2013 through 2018

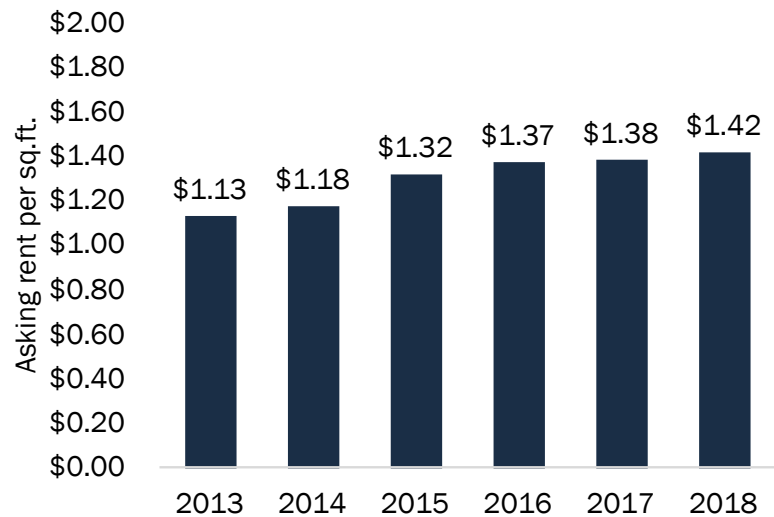
Source: CoStar.



Tualatin's average asking multifamily rent per square foot had increased since 2013.

Exhibit 69. Average Asking Multifamily Rent per Square Foot, Tualatin, 2013 through 2018

Source: CoStar.



Housing Affordability

A typical standard used to determine housing affordability is that a household should pay no more than a certain percentage of household income for housing, including payments and interest or rent, utilities, and insurance. The Department of Housing and Urban Development’s guidelines indicate that households paying more than 30% of their income on housing experience “cost burden,” and households paying more than 50% of their income on housing experience “severe cost burden.” Using cost burden as an indicator is one method of determining how well a city is meeting the Goal 10 requirement to provide housing that is affordable to all households in a community.

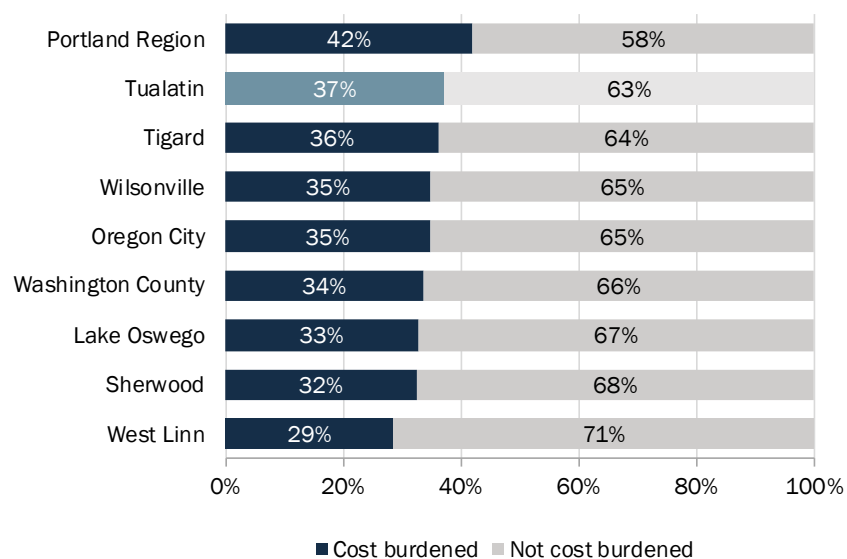
About 37% of Tualatin’s households (renters and homeowners) are cost burdened, of which 16% are severely cost burdened. About 56% of renter households (households who rent) are cost burdened, compared with 22% of homeowners (households who own their own home). Twenty-five percent of households in Tualatin are rent burdened households.⁴⁰ Overall, Tualatin has a slightly larger share of cost-burdened households than Washington County but a lower share of cost-burdened households than the Portland Region.

Overall, about 37% of all households in Tualatin were cost burdened.

In the 2013-2017 period, Tualatin had one of the highest rates of cost burdened households relative to other comparison areas.

Exhibit 70. Housing Cost Burden, Tualatin, Washington County, and Comparison Areas, 2013-2017

Source: U.S. Census Bureau, 2013-2017 ACS Tables B25091 and B25070.

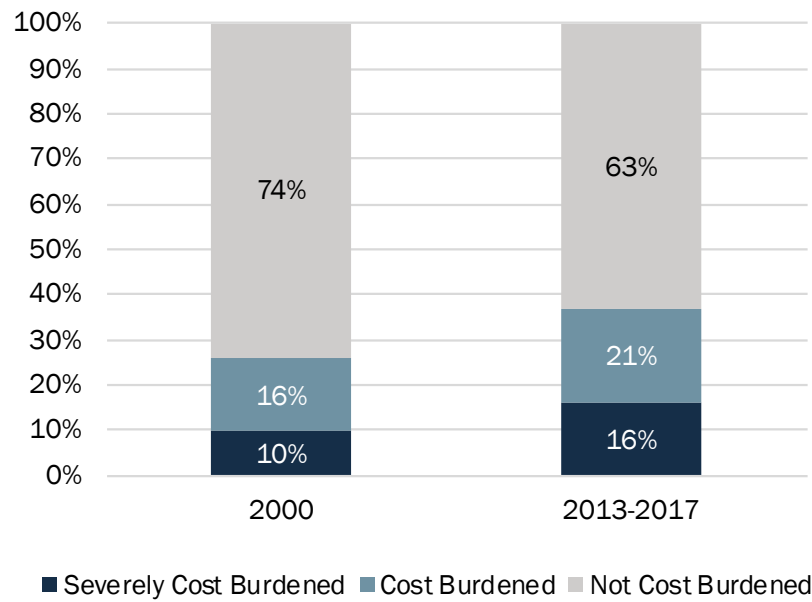


⁴⁰ Cities with populations >10,000 are required, per HB 4006, to assess “rent burden” if more than 50% of renters are cost burdened. In Tualatin as of the 2013-2017 period, 56% of total renter households were cost burdened. Upon further assessment, we find that a quarter (25%) of Tualatin’s households (renters and homeowners) were cost burdened renters (households that rent housing and pay more than 30% of their income on housing).

From 2000 to the 2013-2017 period, the share of cost burdened and severely cost burdened households in Tualatin grew by 11%.

Exhibit 71. Change in Housing Cost Burden, Tualatin, 2000 to 2013-2017

Source: U.S. Census Bureau, 2000 Decennial Census, Tables H069 and H094 and 2013-2017 ACS Tables B25091 and B25070.

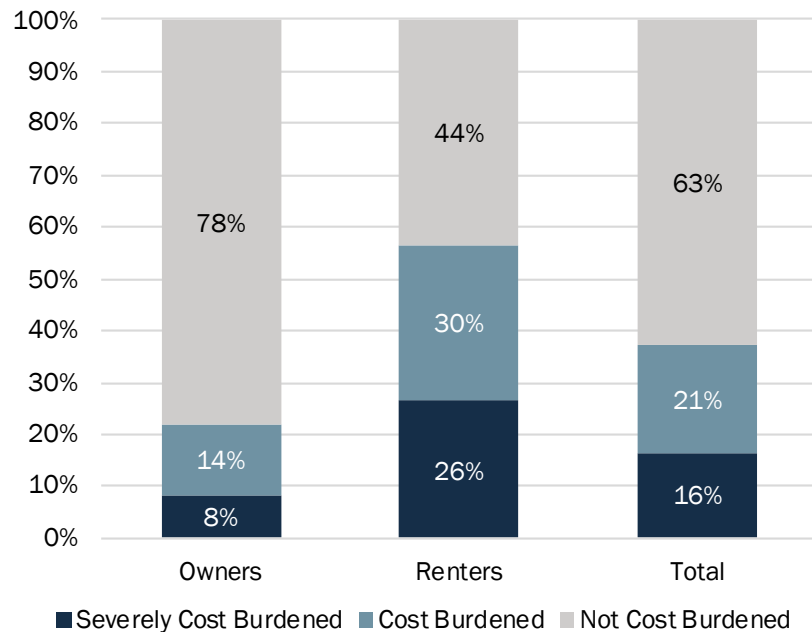


Renters were more likely to be cost burdened than homeowners.

In the 2013-2017 period, about 56% of Tualatin’s renters were cost burdened or severely cost burdened, compared to 22% of homeowners.

Exhibit 72. Housing Cost Burden by Tenure, Tualatin, 2013-2017

Source: U.S. Census Bureau, 2013-2017 ACS Tables B25091 and B25070.

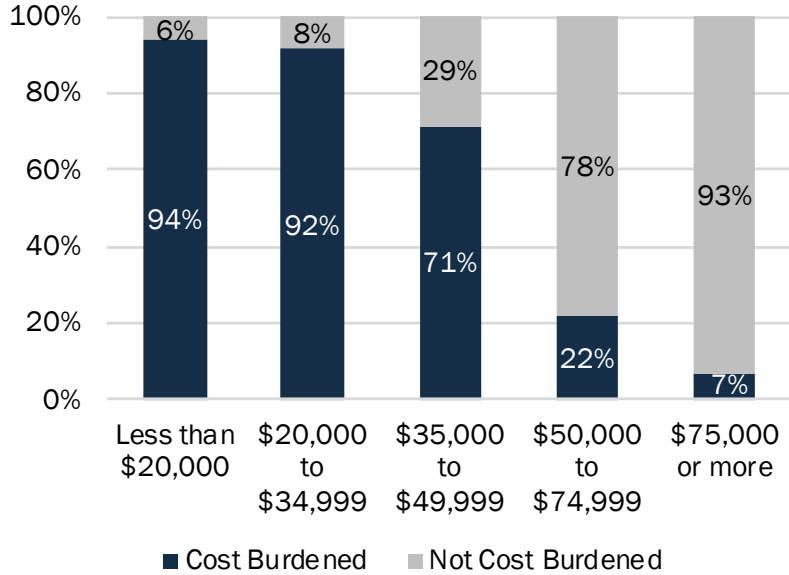


Nearly all renter households earning less than \$35,000 per year were cost burdened.

Most households earning between \$35,000 and \$50,000 per year were cost burdened.

Exhibit 73. Cost Burdened Renter Households, by Household Income, Tualatin, 2013-2017

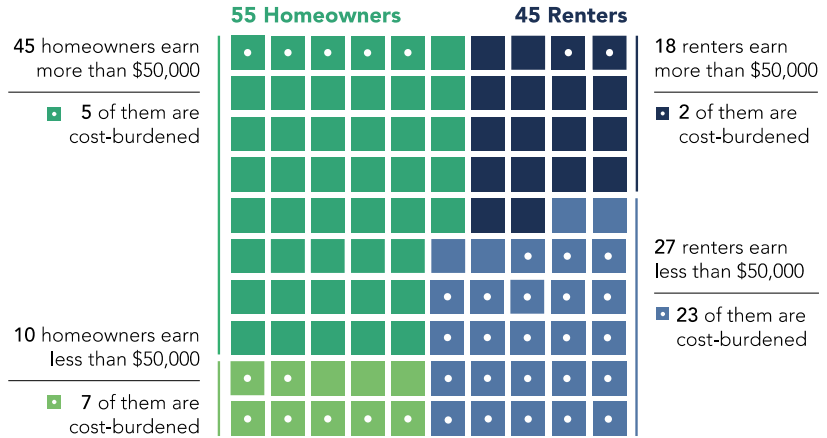
Source: U.S. Census Bureau, 2013-2017 ACS Table B25074.



If all of Tualatin's households were 100 residents, 27 households would be renters earning \$50,000 or less per year; 23 of these households (85%) would be cost burdened.

Exhibit 74. Illustration of Cost Burden: If all of Tualatin's Households were 100 Residents

Source: U.S. Census Bureau, 2013-2017 ACS Table S2503.



Another measure of cost burden is considering housing costs plus transportation costs. When examining housing and transportation cost burden, a household is considered cost burdened if they spend more than 45% of gross income on housing and transportation costs combined. Metro's 2014 *Metro Urban Growth Report* contains extensive documentation of housing and transportation cost burden.

Tualatin residents spend between 34% and 40% of their income on housing plus transportation costs.

Compared to the Metro Region, Tualatin residents spend a similar percentage of their income on housing and transportation costs.

Exhibit 75. Average Cost of Transportation and Housing as a Percent of Income, Tualatin and the Metro Region, 2010 and 2035⁴¹

Source: 2014 Metro Urban Growth Report, Appendix 12.

2010	40% \$2,541 per month Tualatin	39% \$2,300 per month Metro UGB
	2035	34% \$2,723 per month Tualatin
		35% \$2,050 per year Metro UGB

Using Metro's definition for cost burdened, about 15% of households in Tualatin are forecast to be cost burdened by 2035, comparable with the region.

Exhibit 76. Percent of Households with Housing and Transportation Cost Burden, Tualatin and the Metro Region, 2010 and 2035

Source: 2015 Metro Urban Growth Report, Appendix 12.

2010	20% 2,046 households Tualatin	17% 104,100 households Metro UGB
	2035	15% 1,838 households Tualatin
		15% 119,300 households Metro UGB

⁴¹ 2035 estimates use Metro's Medium Growth forecast.

While cost burden is a common measure of housing affordability, it does have some limitations. Two important limitations are:

- A household is defined as cost burdened if the housing costs exceed 30% of their income, regardless of actual income. The remaining 70% of income is expected to be spent on non-discretionary expenses, such as food or medical care, and on discretionary expenses. Households with higher incomes may be able to pay more than 30% of their income on housing without impacting the household’s ability to pay for necessary non-discretionary expenses.
- Cost burden compares income to housing costs and does not account for accumulated wealth. As a result, the estimate of how much a household can afford to pay for housing does not include the impact of a household’s accumulated wealth. For example, a household of retired people may have relatively low income but may have accumulated assets (such as profits from selling another house) that allow them to purchase a house that would be considered unaffordable to them based on the cost burden indicator.

Another way of exploring the issue of financial need is to review housing affordability at varying levels of household income.

Fair Market Rent for a 2-bedroom apartment in Washington County was \$1,330 in 2018.

Exhibit 77. HUD Fair Market Rent (FMR) by Unit Type, Washington County, 2018

Source: U.S. Department of Housing and Urban Development.

\$1,026	\$1,132	\$1,330	\$1,935	\$2,343
Studio	1-Bedroom	2-Bedroom	3-Bedroom	4-Bedroom

A household must earn at least \$25.58 per hour to afford a two-bedroom unit at Fair Market Rent (\$1,330) in Washington County.

Exhibit 78. Affordable Housing Wage, Washington County, 2018

Source: U.S. Department of Housing and Urban Development; Oregon Bureau of Labor and Industries.

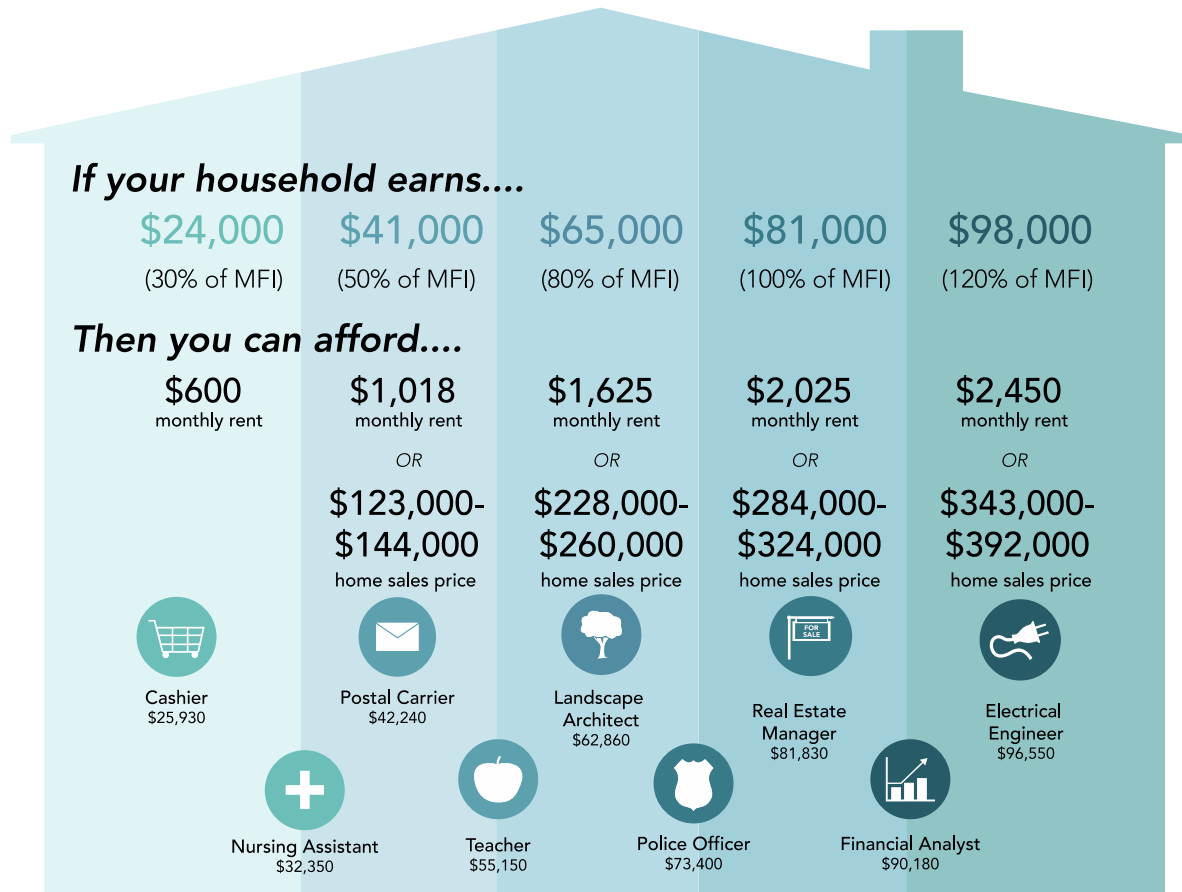
\$25.58 per hour

Affordable Housing Wage for two-bedroom Unit in Washington County

Illustrated in Exhibit 79, a household earning median family income in Washington County (about \$81,000 per year) can afford a monthly rent of about \$2,025 or a home roughly valued between \$284,000 and \$324,000.

Exhibit 79. Financially Attainable Housing, by Median Family Income (MFI) for Washington County (\$81,400), Tualatin, 2018

Source: U.S. Department of Housing and Urban Development, Washington, 2018. Bureau of Labor Services, 2017, for Portland MSA.



About 26% of Tualatin's households had incomes less than \$41,000 and cannot afford a two-bedroom apartment at Washington County's Fair Market Rent (FMR) of \$1,330.

Exhibit 80. Share of Households, by Median Family Income (MFI) for Washington County (\$81,400), Tualatin, 2018

Source: U.S. Department of Housing and Urban Development, Washington County, 2018. U.S. Census Bureau, 2013-2017 ACS Table 19001.

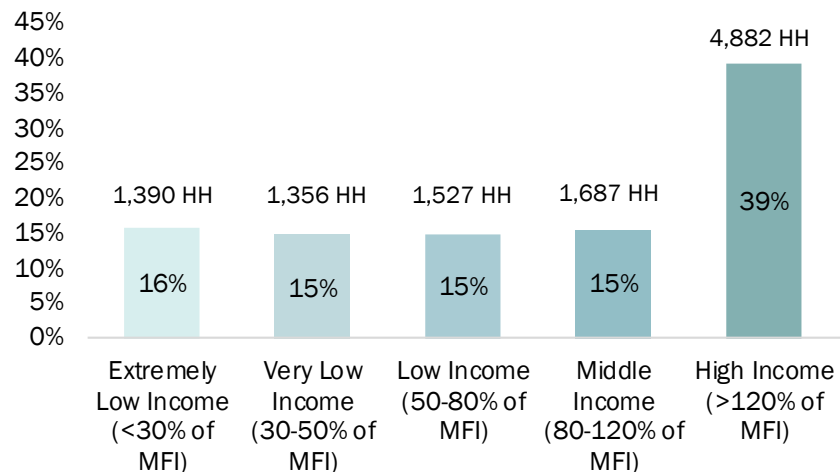
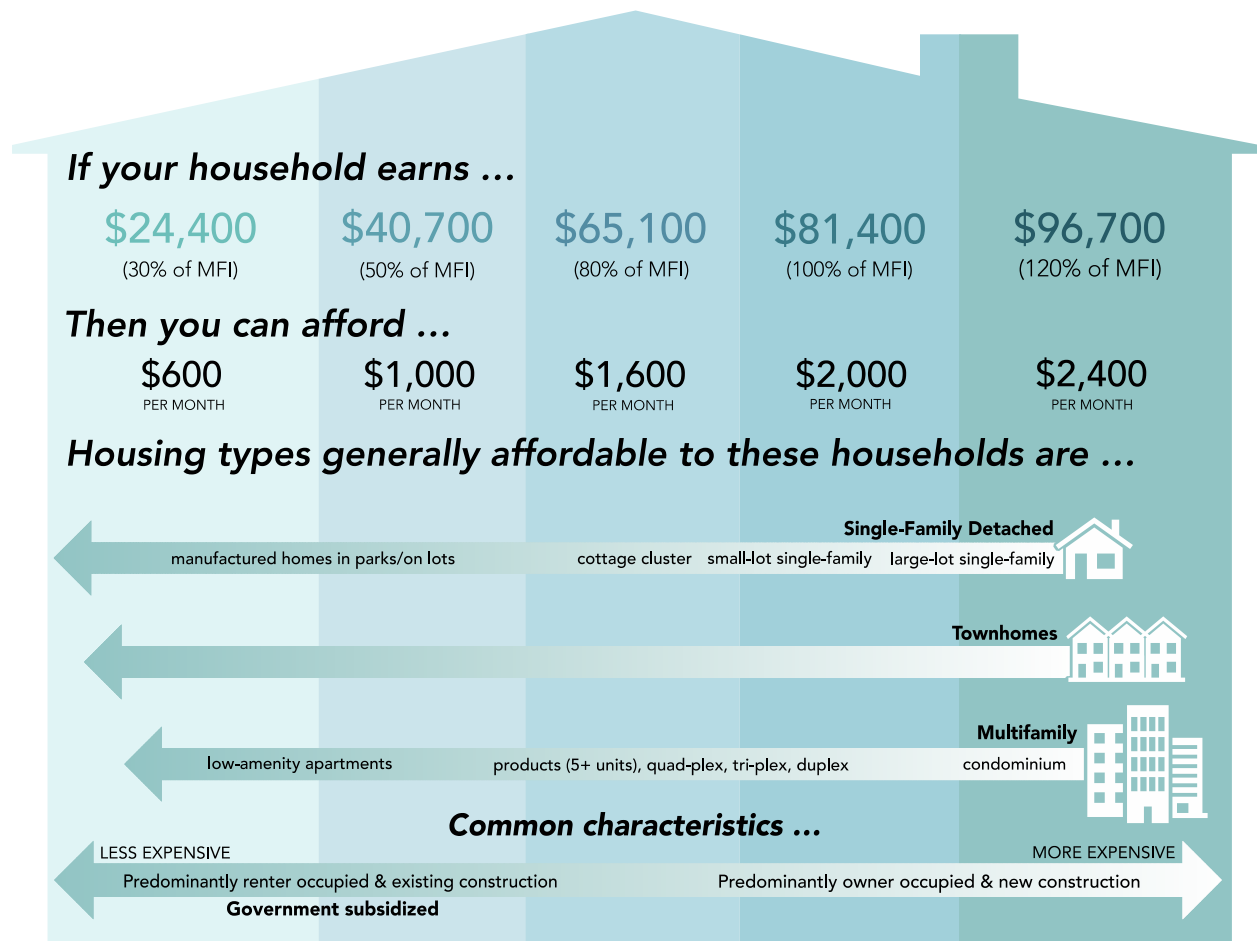


Exhibit 81 illustrates the types of financially attainable housing by income level in Washington County. Generally speaking, lower-income households will be renters occupying existing housing. Newly built housing will be a combination of renters (most likely in multifamily housing) and homeowners. The types of housing affordable for the lowest income households is limited to subsidized housing, manufactured housing, lower-cost single-family housing, and multifamily housing (apartments). The range of financially attainable housing increases with increased income.

Exhibit 81. Types of Financially Attainable Housing by Median Family Income (MFI) for Washington County (\$81,400), Tualatin, 2018

Source: U.S. Department of Housing and Urban Development, Washington County, 2018.



While Exhibit 63 presented a distribution of home sale prices in Tualatin from homes sold in 2017–2018, Exhibit 82 presents a distribution of home sale prices by affordability range for Tualatin in 2016–2018. Most housing sold in Tualatin in 2016, 2017, 2018 these years were affordable to households earning between 150% and 200% of the Median Family Income (MFI), or a household income of about \$122,100 to \$162,800. If housing prices continue to rise as they have in Exhibit 82, Tualatin may need to consider policies to support development of housing affordable for homeownership for households earning 80% to 150% of MFI, such as allowing smaller lot and smaller unit single-family detached housing or townhouses or policies to lower the costs of housing development such as SDC waivers or other financial support for development of housing affordable for homeownership.

Exhibit 82. Distribution of Home Sale Prices by Affordability Range, Tualatin, 2016, 2017, 2018

Source: RLIS. Note: 2018 data is through September 2018.

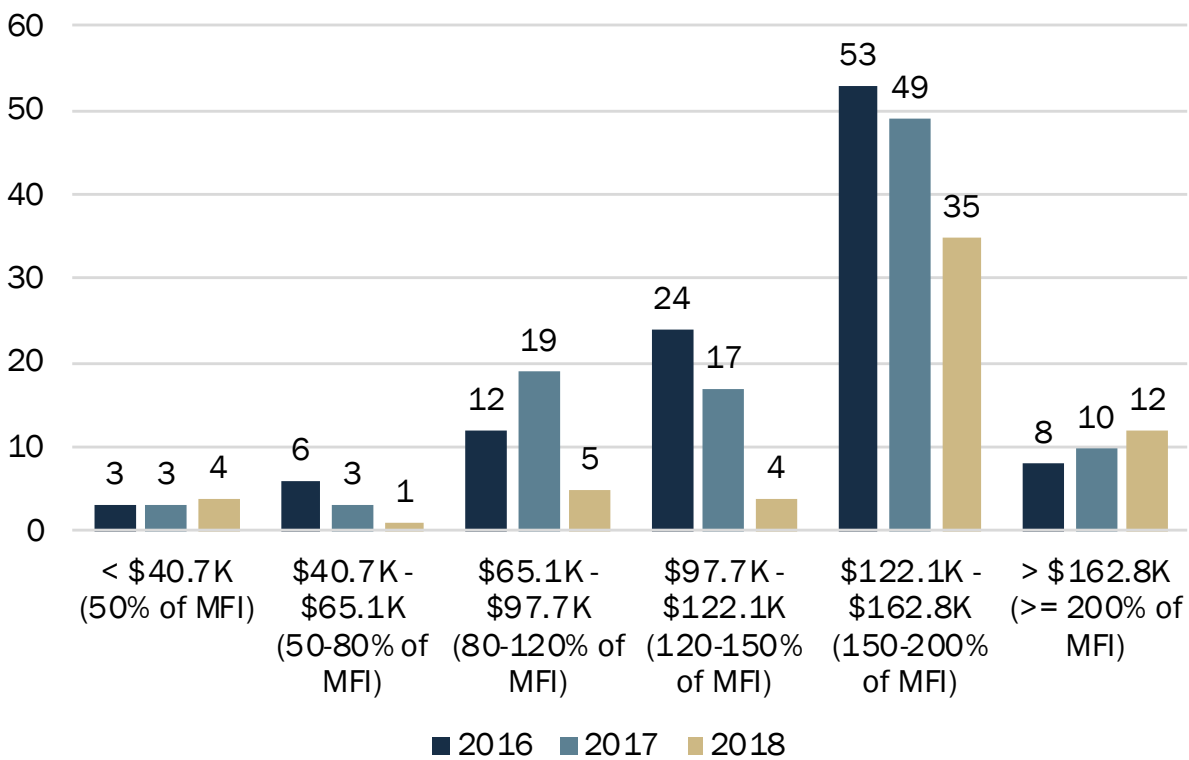
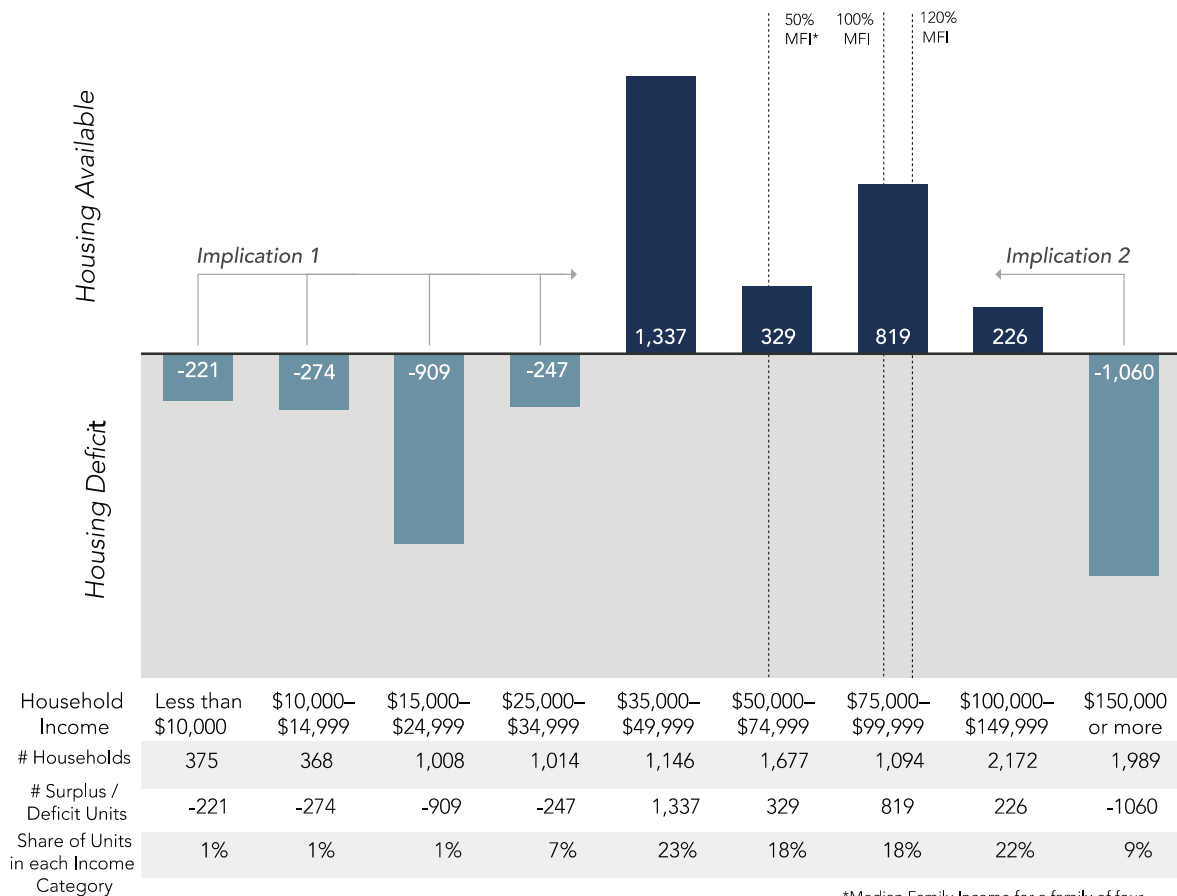


Exhibit 83 compares the number of households by income with the number of units affordable to those households in Tualatin. Tualatin currently has a deficit of housing affordable to households earning less than \$35,000. The types of housing that Tualatin has a deficit of are more affordable housing types such as: government-subsidized housing, multifamily products, and more affordable single-family homes (e.g. tiny homes, cottages, manufactured housing). Tualatin also shows a need for higher amenity housing types for households earning more than \$150,000 per year or more. Higher amenity housing types include single-family detached housing, single-family attached housing (e.g. townhomes and rowhouses), and higher-end multifamily products (including condominiums).

Exhibit 83. Affordable Housing Costs and Units by Income Level, Tualatin, 2018

Source: U.S. Census Bureau, 2013-2017 ACS. Note: MFI is Median Family Income, determined by HUD for the Portland MSA. Portland MSA's MFI in 2018 was \$81,400.



Implication 1

Some lower-income households live in housing that is more expensive than they can afford because affordable housing is not available. These households are cost burdened.

Implication 2

Some higher-income households choose housing that costs less than they can afford. This may be the result of the household's preference or it may be the result of a lack of higher-cost and higher-amenity housing that would better suit their preferences.

Exhibit 58 shows that 7% of the people who work in Tualatin also live in Tualatin. One of the key questions for Tualatin is whether people who work at businesses in Tualatin can afford housing in Tualatin.

Tualatin has 0.7 residents for every job (Exhibit 84).⁴² In comparison, Washington County has 1.6 residents for every job and the Portland Region (Clackamas, Multnomah, and Washington County) has 1.4 residents for every job. The large number of jobs relative to the number of residents in Tualatin was an important part of the discussion in the development of the Housing Needs Analysis, with concerns focusing on the impacts of commuting on Tualatin’s transportation system and negative impacts on quality of life in Tualatin (such as heavy traffic congestion).

Tualatin has more jobs per capita than Washington County and the Portland Region.

Exhibit 84. Ratio of Residents to Jobs, Tualatin, 2017

Source: Bureau of Labor Services, Quarterly Census of Employment and Wages.

	Employees	Residents	Residents for every Job
Tualatin	38,838	26,960	0.7
Washington County	595,860	337,127	1.6
Portland Region	1,811,860	1,259,773	1.4

Exhibit 85 shows affordable housing costs for workers at businesses in Tualatin. For example, a household with one individual employed in furniture manufacturing (earning about \$39,000 per year) can afford neither the average multifamily rents in Tualatin (\$1,220 per month) nor the median housing sale price in Tualatin (about \$480,000 as of February 2019) is affordable.

However, Exhibit 85 reflects housing affordability costs for one worker per household. This analysis recognizes that most multi-person households have more than one person employed, and many have dual incomes. According to Census and Oregon Employment Department data, Washington County and Tualatin both have about 1.4 jobs per household, including both full-time and part-time jobs. This shows that most multi-person households in Tualatin have more than one worker. **It is not necessarily reasonable to expect one worker to be able to afford housing costs in Tualatin alone (or any other city in the Portland region), given the prevalence of dual-income households.**

⁴² Ratios rely on population estimates from Portland State University’s Population Research Center (2017) and Bureau of Economic Analysis (2017).

Exhibit 85. Housing affordability for workers at existing jobs in Tualatin, 2017

Source: Oregon Employment Department. Note: Average multifamily rent in Tualatin is \$1,220 (Costar, 2018) and median housing price is \$480,000 (Redfin, February 2019).

Industry / Sector	Average Wage per Employee (Tualatin)	Affordable Average Monthly Rent	Can a person in this industry afford average multifamily rent in Tualatin?	Affordable Housing Price (Approximate)	Can a person in this industry afford the median housing price in Tualatin?
Agriculture, Forestry, & Mining	\$58,960	\$1,474	Yes	\$206,359	No
Construction	\$67,726	\$1,693	Yes	\$237,039	No
Manufacturing (Mfg.)	\$76,654	\$1,916	Yes	\$268,287	No
Food, Beverage, & Apparel Mfg.	\$105,489	\$2,637	Yes	\$369,211	No
Wood, Paper, & Material Product Mfg.	\$55,784	\$1,395	Yes	\$195,242	No
Metal Mfg.	\$51,311	\$1,283	Yes	\$179,587	No
Machinery Mfg.	\$105,837	\$2,646	Yes	\$370,430	No
Computer & Electronic Product Mfg.	\$60,545	\$1,514	Yes	\$211,908	No
Electrical Equipment, Appliance, & Component Mfg.	\$70,665	\$1,767	Yes	\$247,328	No
Transportation Equipment Mfg.	\$69,047	\$1,726	Yes	\$241,665	No
Furniture & Related Product Mfg.	\$39,324	\$983	No	\$137,634	No
Miscellaneous Mfg.	\$59,538	\$1,488	Yes	\$208,384	No
Wholesale Trade	\$60,767	\$1,519	Yes	\$212,683	No
Retail Trade	\$28,260	\$707	No	\$98,911	No
Transportation, Warehousing & Utilities	\$61,459	\$1,536	Yes	\$215,108	No
Information	\$93,233	\$2,331	Yes	\$326,315	No
Finance & Insurance	\$79,155	\$1,979	Yes	\$277,042	No
Real Estate, Rental & Leasing	\$52,102	\$1,303	Yes	\$182,357	No
Professional, Scientific, & Technical Services	\$66,277	\$1,657	Yes	\$231,969	No
Management of Companies & Enterprises	\$73,374	\$1,834	Yes	\$256,808	No
Administrative & Waste Management Services	\$34,561	\$864	No	\$120,964	No
Private Educational Services	\$24,952	\$624	No	\$87,334	No
Health Care & Social Assistance	\$62,746	\$1,569	Yes	\$219,610	No
Arts, Entertainment, & Recreation	\$18,144	\$454	No	\$63,504	No
Accommodation & Food Services	\$20,334	\$508	No	\$71,170	No
Other Services, Except Public Administration	\$40,441	\$1,011	No	\$141,543	No
Government	\$55,058	\$1,376	Yes	\$192,703	No

Exhibit 86 displays housing affordability of workers in Tualatin’s current target industries. Tualatin’s target industries were identified in their Economic Opportunities Analysis (2019). These industries may change as the Economic Opportunities Analysis is revised.

Exhibit 86. Housing Affordability for workers at target industries in Washington County, 2017

Source: Oregon Employment Department. Note1: Average multifamily rent in Tualatin is \$1,220 (Costar, 2018) and median housing price is \$480,000 (Redfin, February 2019). Note2: Advanced manufacturing uses the average wage for all manufacturing subsectors and Distribution and Electric Commerce uses the average wage for the transportation, warehousing, and utilities sector.

Industry / Sector	Average Wage per Employee (Washington County)	Affordable Average Monthly Rent	Can a person in this industry afford average multifamily rent in Tualatin?	Affordable Housing Price	Can a person in this industry afford the median housing price in Tualatin?
Food Processing & Manufacturing	\$66,166	\$1,654	Yes	\$231,581	No
Furniture Manufacturing	\$44,797	\$1,120	No	\$156,790	No
Plastics Manufacturing	\$50,725	\$1,268	Yes	\$177,538	No
Information Technology & Analytical Instruments	\$95,907	\$2,398	Yes	\$335,675	No
Distribution and Electronic Commerce	\$50,314	\$1,258	Yes	\$176,099	No
Advanced Manufacturing	\$110,756	\$2,769	Yes	\$387,646	No
Business Services	\$89,380	\$2,235	Yes	\$312,830	No

Summary of the Factors Affecting Tualatin's Housing Needs

The purpose of the analysis thus far has been to provide background on the kinds of factors that influence housing choice. While the number and interrelationships among these factors ensure that generalizations about housing choice are difficult to make and prone to inaccuracies, it is a crucial step to informing the types of housing that will be needed in the future.

There is no question that age affects housing type and tenure. Mobility, the ability to move freely and easily from one community to another, is substantially higher for people aged 20 to 34. People in that age group will also have, on average, less income than people who are older and they are less likely to have children. These factors mean that younger households are much more likely to be renters, and renters are more likely to be in multifamily housing.

The data illustrates what more detailed research has shown and what most people understand intuitively: life cycle and housing choice interact in ways that are predictable in the aggregate; age of the household head is correlated with household size and income; household size and age of household head affect housing preferences; and income affects the ability of a household to afford a preferred housing type. The connection between socioeconomic and demographic factors and housing choice is often described informally by giving names to households with certain combinations of characteristics: the "traditional family," the "never-marrieds," the "dinks" (dual-income, no kids), and the "empty-nesters."⁴³ Thus, simply looking at the long wave of demographic trends can provide good information for estimating future housing demand.

⁴³ See *Planning for Residential Growth: A Workbook for Oregon's Urban Areas* (June 1997).

Still, one is ultimately left with the need to make a qualitative assessment of the future housing market. The following is a discussion of how demographic and housing trends are likely to affect housing in Tualatin over the next 20 years:

- **Growth in housing will be driven by growth in households.** Households in Tualatin’s city limits are forecast to grow from 10,791 households to 11,362 households, an increase of 571 households between 2020 and 2040.⁴⁴ In that same time, households in Basalt Creek are forecast to grow from 203 households to 646 households, an increase of 443 households. Together, Tualatin city limits and Basalt Creek will grow by 1,014 households between 2020 and 2040. Tualatin is planning for 1,014 new dwelling units to meet the needs of its forecasted new households.
- **Housing affordability is a growing challenge in Tualatin.** It is a challenge in most of the region in general, and Tualatin is affected by these regional trends. Housing prices are increasing faster than incomes in Tualatin and Washington County, which is consistent with state and national challenges. Tualatin has a large share of multifamily housing (about 41% of the City’s housing stock), but over half of renter households are cost burdened. Tualatin’s key challenge over the next 20 years is providing opportunities for development of relatively affordable housing of all types, such as lower-cost single-family housing, townhouses and duplexes, market-rate multifamily housing, and government-subsidized affordable housing.
- **Without substantial changes in housing policy, on average, future housing will look a lot like past housing.** That is the assumption that underlies any trend forecast, and one that is important when trying to address demand for new housing.

The City’s residential policies can impact the amount of change in Tualatin’s housing market, to some degree. If the City adopts policies to increase opportunities to build smaller-scale single-family and multifamily housing types (particularly single-family attached that is comparatively affordable to moderate-income households), a larger percentage of new housing developed over the next 20 years in Tualatin may begin to address the city’s needs. Examples of policies that the City could adopt to achieve this outcome include: allowing a wider range of housing types (e.g., duplex or townhouses) in single-family zones, ensuring that there is sufficient land zoned to allow single-family attached and multifamily housing development, supporting development of government-assisted affordable housing, and encouraging multifamily residential development in downtown. The degree of change in Tualatin’s housing market, however, will depend on market demand for these types of housing in Washington County.

- **If the future differs from the past, it is likely to move in the direction, on average, of smaller units and more diverse housing types.** Most of the evidence suggests that the bulk of the change will be in the direction of smaller average house and lot sizes for

⁴⁴ This forecast is based on Metro’s 2040 *Population Distributed Forecast* (2016) for Tualatin from 2015 (extrapolated to 2020) to 2040 period, shown in Exhibit 31.

single-family housing. This includes providing opportunities for development of smaller single-family detached homes, townhomes, and multifamily housing.

Key demographic and economic trends that will affect Tualatin's future housing needs are: (1) the aging of the Baby Boomers, (2) the aging of the Millennials, and (3) the continued growth in Latinx population.

- *The Baby Boomer's population is continuing to age.* By 2040, people 60 years and older will account for 24% of the population in Washington County (up from 20% in 2020). The changes that affect Tualatin's housing demand as the population ages are that household sizes and homeownership rates decrease. The majority of Baby Boomers are expected to remain in their homes as long as possible, downsizing or moving when illness or other issues cause them to move. Demand for specialized senior housing, such as age-restricted housing or housing in a continuum of care from independent living to nursing home care, may grow in Tualatin.
- *Millennials will continue to form households and make a variety of housing choices.* As Millennials age and form households, generally speaking, their household sizes will increase, and their homeownership rates will peak by about age 55. Between 2020 and 2040, Millennials (and the generation after) will be a key driver in demand for housing for families with children. The ability to attract Millennials will depend on the City's availability of affordable renter and ownership housing. It will also depend on the location of new housing in Tualatin as many Millennials prefer to live in more urban environments.⁴⁵ The decline in homeownership among the Millennial generation has more to do with financial barriers rather than the preference to rent.⁴⁶
- *Latinx population will continue to grow.* The U.S. Census projects that by about 2040, the Latinx population will account for one-quarter of the nation's population. The share of Latinx population in the Western U.S. is likely to be higher. The Latinx population currently accounts for about 16% of Tualatin's population. In addition, the Latinx population is generally younger than the U.S. average, with many Latinx people belonging to the Millennial generation.

The Latinx population growth will be an important driver in growth of housing demand, both for owner- and renter-occupied housing. Growth in the Latinx population will drive demand for housing for families with children. Given the lower income for Latinx households, especially first-generation immigrants,

⁴⁵ Choi, Hyun June; Zhu, Jun; Goodman, Laurie; Ganesh, Bhargavi; Strochak, Sarah. (2018). Millennial Homeownership, Why is it So Low, and How Can We Increase It? Urban Institute. https://www.urban.org/research/publication/millennial-homeownership/view/full_report

⁴⁶ Ibid.

growth in this group will also drive demand for affordable housing, both for ownership and renting.⁴⁷

In summary, an aging population, increasing housing costs (although lower than the Region), housing affordability concerns for Millennials and the Latinx populations, and other variables are factors that support the conclusion of need for a broader array of housing choices. Growth of retirees will drive demand for small single-family detached houses and townhomes for homeownership, townhome and multifamily rentals, age-restricted housing, and assisted-living facilities. Growth in Millennials and Latinx populations will drive demand for affordable housing types, including demand for affordable single-family units (many of which may be ownership units), for affordable multifamily units (many of which may be rental units), and for dwellings with a larger number of bedrooms.

- **No amount of analysis is likely to make the distant future completely certain: the purpose of the housing forecasting in this study is to get an approximate idea about the future (so policy choices can be made today).** Economic forecasters regard any economic forecast more than three (or at most five) years out as highly speculative. At one year, one is protected from being disastrously wrong by the sheer inertia of the economic machine. A variety of factors or events could, however, cause growth forecasts to be substantially different.

⁴⁷ The following articles describe housing preferences and household income trends for Latinx families, including differences in income levels for first, second, and third generation households. In short, Latinx households have lower median incomes than the national averages. First and second generation Latinx households have median incomes below the average for all Latinx households. Latinx households have a strong preference for homeownership, but availability of mortgages and availability of affordable housing are key barriers to homeownership for this group.

Pew Research Center. *Second-Generation Americans: A Portrait of the Adult Children of Immigrants*, February 7, 2012.

National Association of Hispanic Real Estate Professionals. *2014 State of Hispanic Homeownership Report*, 2014.

5. Housing Need in Tualatin

Project New Housing Units Needed in the Next 20 Years

The results of the housing needs analysis are based on: (1) Metro’s official household forecast for growth in Tualatin over the 20-year planning period, (2) information about Tualatin’s housing market relative to Washington County and the Portland Region, and (3) the demographic composition of Tualatin’s existing population and expected long-term changes in the demographics of Washington County.

Forecast for Housing Growth

A 20-year household forecast (in this instance for 2020 to 2040) is the foundation for estimating needed new dwelling units. The forecast for Tualatin is based on Metro’s 2040 Household Distributed Forecast, 2016 and Metro’s 2040 TAZ Forecast for households, 2015. Tualatin city limits will grow from 10,994 households in 2020⁴⁸ to 12,008 households in 2040, an increase of 1,014 households.⁴⁹

To accommodate new households, Exhibit 87 shows that Tualatin will have demand for 1,014 new dwelling units over the 20-year period, with an annual average of 51 dwelling units.

Exhibit 87. Forecast of demand for new dwelling units, Tualatin Planning Area (city limits and Basalt Creek), 2020 to 2040

Source: Metro’s 2040 Household Distributed Forecast, July 12, 2016. Metro’s 2040 TAZ Forecast for households, November 6, 2015. Calculations by ECONorthwest. Note: DU is dwelling unit.

Variable	New DU City Limits	New DU Basalt Creek	New DU Tualatin Planning Area
Household Forecast 2020	10,791	203	10,994
Household Forecast 2040	11,362	646	12,008
Total New Dwelling Units (2020-2040)	571	443	1,014
Annual Average of New Dwelling Units	29	22	51

⁴⁸ Metro’s 2040 Household Distributed Forecast shows that in 2015, the Tualatin city limits had 10,653 households. The Metro forecast shows Tualatin growing to 11,362 households in 2040, an average annual growth rate of 0.26% for the 25-year period. Using this growth rate, ECONorthwest extrapolated the forecast to 2020 (10,791 households).

In addition, ECONorthwest included the forecast for new households in the Basalt Creek Planning Area. The forecast for households in Basalt Creek derive from Metro’s 2040 TAZ Forecast for households (TAZ 980 and 981). The Metro forecast shows Basalt Creek growing to 646 households in 2040, an average annual growth rate of 5.96% for the 25-year period. Using this growth rate, ECONorthwest extrapolated the forecast from 2015 (152 households) to 2020 (203 households).

⁴⁹ This forecast is based on Tualatin city limits’ official household forecast from Metro for the 2020 to 2040 period.

Housing Units Needed Over the Next 20 Years

Exhibit 87 presents a forecast of new housing in Tualatin for the 2020 to 2040 period. This section determines the needed mix and density for the development of new housing developed over this 20-year period in Tualatin.

Exhibit 89 shows that over the next 20-years, the need for new housing developed in Tualatin will generally include a wider range of housing types across the affordability spectrum. This conclusion is consistent with housing need in other in the Portland Region and most cities across the State. This conclusion is based on the following information, found in Chapter 3 and 4 of this report.

- Tualatin's housing mix is predominately single-family detached and multifamily. In the 2013-2017 period, 53% of Tualatin's housing was single-family detached, 41% was multifamily, and 6% was single-family attached. In comparison, the mix of housing for the entire Portland Region was 63% single-family detached, 32% multifamily, and 5% single-family attached.
- Demographic changes across the Portland Region (and in Tualatin) suggest increases in demand for single-family attached housing and multifamily housing. The key demographic trends that will affect Tualatin's future housing needs are the aging of the Baby Boomers, household formation of Millennial households, and growth of Latinx households.
- Tualatin households have incomes about the same as those for the Portland Region. Tualatin's median household income was \$72,580, about \$1,500 lower than Washington County's median. Approximately 36% of Tualatin households earn less than \$50,000 per year, compared to 33% in Washington County and 37% in the Portland Region.
- About 37% of Tualatin's households are cost burdened (paying 30% or more of their household income on housing costs), compared to 42% of households in the Portland Region and 34% in Washington County.⁵⁰ About 56% of Tualatin's renters are cost burdened and about 22% of Tualatin's homeowners are cost burdened.
- About 45% of Tualatin's households are renters, 82% of whom live in multifamily housing. Median rents in Tualatin are \$1,154 per month, compared to the \$1,183 median rent for Washington County as a whole.

A household earning 60% of Tualatin's median household income (\$43,548) could afford about \$1,089 per month in rent. A household with median income in Tualatin (\$72,580) could afford \$1,815 rent per month, compared with the median gross rent of \$1,154. About 41% of Tualatin's housing stock is multifamily, compared to 32% of the housing in the Portland Region.

⁵⁰ The Department of Housing and Urban Development's guidelines indicate that households paying more than 30% of their income on housing experience "cost burden," and households paying more than 50% of their income on housing experience "severe cost burden."

- Housing sales prices increased in Tualatin over the last four years. From February 2015 to February 2019, the median housing sale price increased by \$160,000 (50%), from \$320,000 to \$480,000. A household would need to earn \$120,000 to \$160,000 to afford the median sales price in Tualatin. About 36% of Tualatin’s households have incomes at or above this amount.
- Tualatin needs more affordable housing types for homeowners and renters. A household earning 100% of Tualatin’s median household income of \$72,580 could afford about \$1,815 per month in rent, compared with the median gross rent of about \$1,154. This household could afford to own a home roughly valued between \$254,000 and \$290,000, which is less than the median home sales price of about \$480,000 in Tualatin.⁵¹

While a household could begin to afford Tualatin’s median rents at about 65% of Tualatin’s median household income, the rates of cost burden among renters suggest that Tualatin does not have a sufficient number of affordable rental units. A household can start to afford median home sale prices at about 190% of Tualatin’s median household income.

These factors suggest that Tualatin needs a broader range of housing types with a wider range of price points than are currently available in Tualatin’s housing stock. This includes providing opportunity for development of housing types such as: single-family detached housing (e.g., small homes like cottages or small-lot detached units, traditional detached homes, and high-amenity detached homes), townhouses, and multifamily products (duplexes, triplexes, quadplexes, and apartments and condominiums).

Tualatin evaluated several scenarios to forecast housing growth (Exhibit 88). The scenario selected, and described below, was a combination between Scenario 2 and Scenario 3 (referred to here as Scenario 4). Scenario 4 was 40% single-family detached, 15% multifamily, and 45% multifamily.

⁵¹ In 2016, 2017, and 2018, 19 homes in Tualatin sold within the \$254,000 and \$290,000 price range (out of 268 homes).

Exhibit 88. Forecast of demand for new dwelling units, Tualatin Planning Area (city limits and Basalt Creek), 2020 to 2040

Source: Calculations by ECONorthwest. Note: DU is dwelling unit.

Variable	Mix of New Dwelling Units (2020-2040)			
	Scenario 1	Scenario 2	Scenario 3	Scenario 4
Needed new dwelling units (2020-2040)	1,014	1,014	1,014	1,014
Dwelling units by structure type				
Single-family detached				
Percent single-family detached DU	50%	45%	35%	40%
equals Total new single-family detached DU	507	456	355	406
Single-family attached				
Percent single-family attached DU	9%	10%	15%	15%
equals Total new single-family attached DU	91	102	152	152
Multifamily				
Percent multifamily	41%	45%	50%	45%
Total new multifamily	416	456	507	456
equals Total new dwelling units (2020-2040)	1,014	1,014	1,014	1,014

Exhibit 89 shows the final forecast for housing growth in the Tualatin city limits during the 2020 to 2040 period. The projection is based on the following assumptions:

- Tualatin’s official forecast for population growth shows that the city will add 1,014 households over the 20-year period. Exhibit 89 shows Metro’s forecast for growth of 1,014 new dwelling units over the 20-year planning period.
- The assumptions about the mix of housing in Exhibit 89 are consistent with the requirements of OAR 660-007⁵²:
 - **About 40% of new housing will be single-family detached**, a category which includes manufactured housing. In 2013-2017, 53% of Tualatin’s housing was single-family detached.
 - **Nearly 15% of new housing will be single-family attached**. In 2013-2017, 6% of Tualatin’s housing was single-family attached.
 - **About 45% of new housing will be multifamily**. In 2013-2017, 41% of Tualatin’s housing was multifamily.

⁵² OAR 660-007-0030(1) requires that most Metro cities “...provide the opportunity for at least 50 percent of new residential units to be attached single family housing or multiple family housing...”

Tualatin will have demand for 1,014 new dwelling units over the 20-year period, 40% of which will be single-family detached housing.

Exhibit 89. Forecast of demand for new dwelling units, Tualatin Planning Area, 2020 to 2040

Source: Calculations by ECONorthwest.

Variable	Mix of New Dwelling Units (2020-2040)
Needed new dwelling units (2020-2040)	1,014
Dwelling units by structure type	
Single-family detached	
Percent single-family detached DU	40%
equals Total new single-family detached DU	406
Single-family attached	
Percent single-family attached DU	15%
equals Total new single-family attached DU	152
Multifamily	
Percent multifamily	45%
Total new multifamily	456
equals Total new dwelling units (2020-2040)	1,014

The forecast of new units does not include dwellings that will be demolished and replaced. This analysis does not factor those units in; however, it assumes they will be replaced at the same site and will not create additional demand for residential land.

Exhibit 90 allocates needed housing to Plan Designations in Tualatin. The allocation is based, in part, on the types of housing allowed in the zoning designations in each Plan Designation.

Exhibit 90 shows:

- **Low Residential (RL)** land will accommodate single-family detached housing, including manufactured houses. Low density will also accommodate duplexes, triplexes, quadplexes, cottage clusters, and townhouses based on the requirements of House Bill 2001.
- **Medium Low Residential (RML)** land will accommodate duplexes, townhomes (or rowhouses), and manufactured homes in manufactured housing parks. For consistency with the housing types allowed in Low Residential, this analysis assumes that RML will also allow triplexes and quadplexes.
- **Medium High Residential (RMH)** land will accommodate duplexes, townhomes (or rowhouses), and multifamily housing.
- **High Density Residential (RH)** land will accommodate duplexes, townhomes (or rowhouses), and multifamily housing.
- **High Density High Rise Residential (RH-HR)** land will accommodate duplexes, townhomes (or rowhouses), and multifamily housing.

Exhibit 90. Allocation of needed housing by housing type and Plan Designation, Tualatin Planning Area, 2020 to 2040

Source: ECONorthwest.

Housing Type	Residential Plan Designations					Total
	Low Density	Medium Low Density	Medium High Density	High Density	High High-Rise	
Dwelling Units						
Single-family detached	406	-	-	-	-	406
Single-family attached	30	41	20	61	-	152
Multifamily	30	30	102	193	101	456
Total	466	71	122	254	101	1,014
Percent of Units						
Single-family detached	40%	0%	0%	0%	0%	40%
Single-family attached	3%	4%	2%	6%	0%	15%
Multifamily	3%	3%	10%	19%	10%	45%
Total	46%	7%	12%	25%	10%	100%

Exhibit 91 presents assumptions about future housing density based on historical densities in Tualatin shown in Exhibit 18. Exhibit 91 converts between net acres and gross acres⁵³ to account for land needed for rights-of-way by Plan Designation in Tualatin, based on Metro’s methodology of existing rights-of-way.⁵⁴

- **Low Residential (RL):** Average density in this Plan Designation was historically 5.7 dwelling units per gross acre in tax lots smaller than 0.38 acres and no land is needed for rights-of-ways based on Metro’s assumptions. For lots between 0.38 and 1.0 acres the future density will be 5.1 dwelling units per gross acre, and for lots larger than 1.0 acres the future density will be 4.6 dwelling units per gross acre.
- **Medium Low Residential (RML):** Average density in this Plan Designation was historically 11.7 dwelling units per gross acre in tax lots smaller than 0.38 acres and no land is needed for rights-of-ways based on Metro’s assumptions. For lots between 0.38 and 1.0 acres the future density will be 10.5 dwelling units per gross acre, and for lots larger than 1.0 acres the future density will be 9.5 dwelling units per gross acre.
- **Medium High Residential (RMH):** Average density in this Plan Designation was historically 16.1 dwelling units per gross acre in tax lots smaller than 0.38 acres and no land is needed for rights-of-ways based on Metro’s assumptions. For lots between 0.38

⁵³ OAR 660-024-0010(6) uses the following definition of net buildable acre. “Net Buildable Acre” “...consists of 43,560 square feet of residentially designated buildable land after excluding future rights-of-way for streets and roads.” While the administrative rule does not include a definition of a gross buildable acre, using the definition above, a gross buildable acre will include areas used for rights-of-way for streets and roads. Areas used for rights-of-way are considered unbuildable.

⁵⁴ Metro’s methodology about net-to-gross assumptions are that: (1) tax lots under 3/8 acre assume 0% set aside for future streets; (2) tax lots between 3/8 acre and 1 acre assume a 10% set aside for future streets; and (3) tax lots greater than an acre assumes an 18.5% set aside for future streets. The analysis assumes an 18.5% assumption for future streets.

and 1.0 acres the future density will be 14.5 dwelling units per gross acre, and for lots larger than 1.0 acres the future density will be 13.1 dwelling units per gross acre.

- **High Density Residential (RH):** Average density in this Plan Designation was historically 20.5 dwelling units per gross acre in tax lots smaller than 0.38 acres and no land is needed for rights-of-ways based on Metro’s assumptions. For lots between 0.38 and 1.0 acres the future density will be 18.4 dwelling units per gross acre and, for lots larger than 1.0 acres the future density will be 16.7 dwelling units per gross acre.
- **High Density High Rise Residential (RH-HR):** Average density in this Plan Designation was historically 28.0 dwelling units per gross acre in tax lots smaller than 0.38 acres and no land is needed for rights-of-ways based on Metro’s assumptions. For lots between 0.38 and 1.0 acres the future density will be 15.2 dwelling units per gross acre, and for lots larger than 1.0 acres the future density will be 22.8 dwelling units per gross acre.

Exhibit 91. Assumed future density of housing built in the Tualatin Planning Area, 2020 to 2040

Source: ECONorthwest. Note: DU is dwelling unit.

Residential Plan Designations	Tax Lots Smaller than 0.38 acre			Tax Lots > 0.38 and < 1.0 acre			Tax Lots larger than 1.0 acre		
	Net Density (DU/net acre)	% for Rights-of-Way	Gross Density (DU/gross acre)	Net Density (DU/net acre)	% for Rights-of-Way	Gross Density (DU/gross acre)	Net Density (DU/net acre)	% for Rights-of-Way	Gross Density (DU/gross acre)
Low Density	5.7	0%	5.7	5.7	10%	5.1	5.7	18.5%	4.6
Medium Low Density	11.7	0%	11.7	11.7	10%	10.5	11.7	18.5%	9.5
Medium High Density	16.1	0%	16.1	16.1	10%	14.5	16.1	18.5%	13.1
High Density	20.5	0%	20.5	20.5	10%	18.4	20.5	18.5%	16.7
High Density / High-Rise	28.0	0%	28.0	28.0	10%	25.2	28.0	18.5%	22.8

Through the Housing Strategy, Tualatin may consider increasing densities in specific zones. For example, the City may consider increasing the allowed densities in High Density / High-Rise (and adjusting related zoning standards, such as building heights) to allow higher density multifamily housing than is currently allowed in Tualatin.

Needed Housing by Income Level

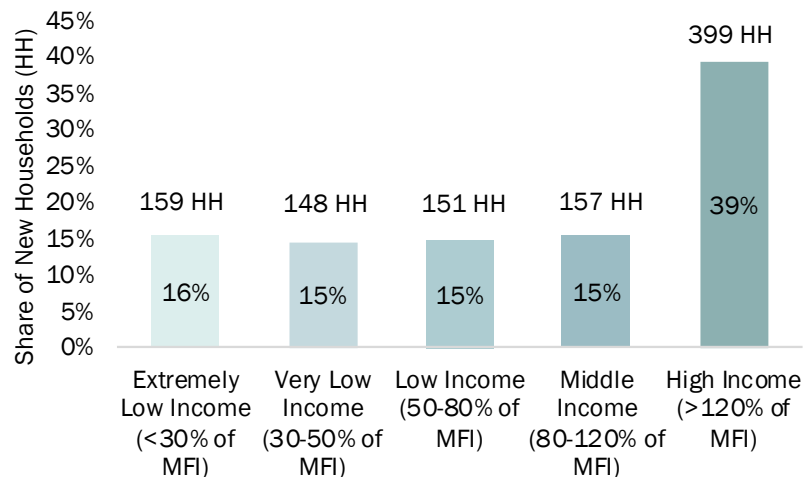
The next step in the housing needs analysis is to develop an estimate of need for housing by income and housing type. This analysis requires an estimate of the income distribution of current and future households in the community. Estimates presented in this section are based on (1) secondary data from the Census, and (2) analysis by ECONorthwest.

The analysis in Exhibit 92 is based on American Community Survey data about income levels for existing households in Tualatin. Income is categorized into market segments consistent with HUD income level categories, using Washington County's 2018 Median Family Income (MFI) of \$81,400. The Exhibit is based on existing household income distribution, assuming that approximately the same percentage of households will be in each market segment in the future.

About a third of Tualatin's future households are forecast to be extremely or very low income and nearly 40% are forecast to have high incomes.

Exhibit 92. Future (New) Households, by Median Family Income (MFI) for Washington County (\$69,600), Tualatin Planning Area, 2018

Source: U.S. Department of Housing and Urban Development, Washington County, 2018. U.S. Census Bureau, 2013-2017 ACS Table 19001.



Need for Government-Assisted and Manufactured Housing

ORS 197.303, 197.307, 197.312, and 197.314 requires cities to plan for government-assisted housing, manufactured housing on lots, and manufactured housing in parks.

- **Government-assisted housing.** Government subsidies can apply to all housing types (e.g., single-family detached, apartments, etc.). Tualatin allows development of government-assisted housing in all residential Plan Designations, with the same development standards for market-rate housing. This analysis assumes that Tualatin will continue to allow government housing in all of its residential Plan Designations. Because government assisted housing is similar in character to other housing (with the exception being the subsidies), it is not necessary to develop separate forecasts for government-subsidized housing.
- **Farmworker housing.** Farmworker housing can apply to all housing types and the City allows development of farmworker housing in all residential Plan Designations, with the same development standards as market-rate housing. This analysis assumes that Tualatin will continue to allow this housing in all of its residential Plan Designations. Because it is similar in character to other housing (with the possible exception of government subsidies, if population restricted), it is not necessary to develop separate forecasts for farmworker housing.
- **Manufactured housing on lots.** Tualatin allows manufactured homes on lots in Low Density Residential zones.
- **Manufactured housing in parks.** Tualatin allows manufactured homes in parks in Medium Low Density zones. According to the Oregon Housing and Community Services' Manufactured Dwelling Park Directory,⁵⁵ Tualatin has two manufactured home parks with 178 spaces.
- ORS 197.480(2) requires Tualatin to project need for mobile home or manufactured dwelling parks based on: (1) population projections, (2) household income levels, (3) housing market trends, and (4) an inventory of manufactured dwelling parks sited in areas planned and zoned or generally used for commercial, industrial, or high density residential.
 - Exhibit 87 shows that Tualatin will grow by 1,014 dwelling units over the 2020 to 2040 period.
 - Analysis of housing affordability shows that about 31% of Tualatin's new households will be considered very low or extremely low income, earning 50% or less of the region's median family income. One type of housing affordable to these households is manufactured housing.

⁵⁵ Oregon Housing and Community Services, Oregon Manufactured Dwelling Park Directory, <http://o.hcs.state.or.us/MDPCRParcs/ParkDirQuery.jsp>

- Manufactured homes in manufactured housing parks accounts for about 2% (about 178 dwelling units) of Tualatin’s current housing stock.
- National, state, and regional trends since 2000 showed that manufactured housing parks are closing, rather than being created. For example, between 2000 and 2015, Oregon had 68 manufactured parks close, with more than 2,700 spaces. Discussions with several stakeholders familiar with manufactured home park trends suggest that over the same period, few to no new manufactured home parks have opened in Oregon.
- The households most likely to live in manufactured homes in parks are those with incomes between \$24,420 and \$40,700 (30% to 50% of MFI), which include 15% of Tualatin’s households. However, households in other income categories may live in manufactured homes in parks.

Manufactured home subdivision development is an allowed use in the Medium Low Density Plan Designation. The national and state trends of closure of manufactured home parks, and the fact that no new manufactured home parks have opened in Oregon in over the last 15 years, demonstrate that development of new manufactured home parks or subdivisions in Tualatin is unlikely.

Our conclusion from this analysis is that development of new manufactured home parks or subdivisions in Tualatin over the 2020 to 2040 planning period is unlikely, although manufactured homes may continue to locate on lots in the Low Density Plan Designation. The forecast of housing assumes that no new manufactured home parks will be opened in Tualatin over the 2020 to 2040 period. The forecast for new dwelling units includes new manufactured homes on lots in the category of single-family detached housing.

- Over the next 20 years (or longer) one or both of Tualatin’s manufactured housing parks may close. This may be a result of the manufactured home park landowners selling or redeveloping their land for uses with higher rates of return, rather than lack of demand for spaces in manufactured home parks. Manufactured home parks contribute to the supply of low-cost affordable housing options, especially for affordable homeownership.

While there is statewide regulation of the closure of manufactured home parks designed to lessen the financial difficulties of this closure for park residents,⁵⁶ the City has a role to play in ensuring that there are opportunities for housing for the displaced residents. The City’s primary roles are to ensure that there is sufficient land zoned for new multifamily housing and to reduce barriers to residential

⁵⁶ ORS 90.645 regulates rules about closure of manufactured dwelling parks. It requires that the landlord must do the following for manufactured dwelling park tenants before closure of the park: give at least one year’s notice of park closure, pay the tenant between \$5,000 to \$9,000 for each manufactured dwelling park space, and cannot charge tenants for demolition costs of abandoned manufactured homes.

development to allow for development of new, relatively affordable housing (i.e. housing affordable to households earning less than 80% of MFI and especially those earning less than 60% of MFI). The City may use a range of policies to encourage development of relatively affordable housing, such as allowing a wider range of moderate density housing (e.g., duplexes or cottages) in Low Density Plan Designation, removing barriers to multifamily housing development, using tax credits to support affordable housing production, developing an inclusionary zoning policy, or partnering with a developer of government-subsidized affordable housing.

6. Residential Land Sufficiency within Tualatin

This chapter presents an evaluation of the sufficiency of vacant residential land in Tualatin to accommodate expected residential growth over the 2020 to 2040 period. This chapter includes an estimate of residential development capacity (measured in new dwelling units) and an estimate of Tualatin’s ability to accommodate needed new housing units for the 2020 to 2040 period, based on the analysis in the housing needs analysis. The chapter ends with a discussion of the conclusions and recommendations for the housing needs analysis.

Capacity Analysis

The buildable lands inventory summarized in Chapter 2 (and presented in full in Appendix A) provides a *supply* analysis (buildable land by type), and Chapter 5 provided a *demand* analysis (population and growth leading to demand for more residential development). The comparison of supply and demand allows the determination of land sufficiency.

There are two ways to calculate estimates of supply and demand into common units of measurement to allow their comparison: (1) housing demand can be converted into acres, or (2) residential land supply can be converted into dwelling units. A complication of either approach is that not all land has the same characteristics. Factors such as zone, slope, parcel size, and shape can affect the ability of land to accommodate housing. Methods that recognize this fact are more robust and produce more realistic results. This analysis uses the second approach: it estimates the ability of vacant residential lands within the UGB to accommodate new housing. This analysis, sometimes called a “capacity analysis,”⁵⁷ can be used to evaluate different ways that vacant residential land may build out by applying different assumptions.

⁵⁷ There is ambiguity in the term *capacity analysis*. It would not be unreasonable for one to say that the “capacity” of vacant land is the maximum number of dwellings that could be built based on density limits defined legally by plan designation or zoning, and that development usually occurs—for physical and market reasons—at something less than full capacity. For that reason, we have used the longer phrase to describe our analysis: “estimating how many new dwelling units the vacant residential land in the UGB is likely to accommodate.” That phrase is, however, cumbersome, and it is common in Oregon and elsewhere to refer to that type of analysis as “capacity analysis,” so we use that shorthand occasionally in this memorandum.

Tualatin Capacity Analysis Results

The capacity analysis estimates the development potential of vacant residential land to accommodate new housing, based on the needed densities shown in Exhibit 91. Exhibit 95 shows that **Tualatin city limit's (Exhibit 93) and Basalt Creek's (Exhibit 94) buildable land has capacity to accommodate approximately 1,207 new dwelling units**, based on the following assumptions:

- **Buildable residential land.** The capacity estimates start with the number of buildable acres in residential Plan Designations, per the buildable lands inventory, for city limits. It starts with the number of buildable acres in residential Plan Designations, per the Basalt Creek Concept Plan, for Basalt Creek.
- **Needed densities.** The capacity analysis assumes development will occur at assumed future densities. Those densities were derived from the densities shown in Exhibit 91.
- **Average net density.** Exhibit 93 shows capacity and densities in gross acres. OAR 660-007 requires that Tualatin provide opportunity for development of housing at an overall average density of eight dwelling units per net acre. The average density of dwelling units in Exhibit 93 is 7.9 dwelling units per net acre and 6.7 dwelling units per gross acre. The average net density of dwelling units in Exhibit 95 is approximately 7.9 dwelling units per net acres and 6.6 dwelling units per gross acre.

Exhibit 93. Estimate of residential capacity on unconstrained vacant and partially vacant buildable land, Tualatin City Limits, 2018

Source: Buildable Lands Inventory; Calculations by ECONorthwest. Note: DU is dwelling unit.

Residential Plan Designations	Tax Lots Smaller than 0.38 acre			Tax Lots > 0.38 and < 1.0 acre			Tax Lots larger than 1.0 acre			Total, combined	
	Buildable Acres	Density Assumption (DU/gross acre)	Capacity (Dwelling Units)	Buildable Acres	Density Assumption (DU/gross acre)	Capacity (Dwelling Units)	Buildable Acres	Density Assumption (DU/gross acre)	Capacity (Dwelling Units)	Buildable Acres	Capacity (Dwelling Units)
Low Density	18	5.7	100	17	5.1	85	44	4.6	204	79	389
Medium Low Density	0	11.7	5	1	10.5	7	0	9.5	-	1	12
Medium High Density	0	16.1	-	0	14.5	-	1	13.1	13	1	13
High Density	0	20.5	6	0	18.4	7	12	16.7	205	13	218
High High-Rise	0	28.0	-	0	25.2	-	0	22.8	-	0	-
Total	18	-	111	18	-	99	58	-	422	94	632

Exhibit 94. Estimate of residential capacity on unconstrained vacant and partially vacant buildable land, Basalt Creek, 2018

Source: Basalt Creek Concept Plan. Note: this table uses the Basalt Creek Concept Plan's estimate for capacity and of buildable land; it does not rely on historic net densities by Plan Designation to calculate capacity on buildable lands. Historic net densities in Basalt Creek were not increased as they were in the estimate of capacity for Tualatin city limits. The amount of buildable land in Exhibit 90 is based on the Basalt Creek Concept Plan and is different than the amount of buildable land shown in Exhibit 7 of the Buildable Lands Inventory.

Residential Plan Designations	Dwelling Units	Buildable Acres from Basalt Creek Concept Plan	Density Assumption (DU per Gross Acre)
Low Density	134	24.8	5.4
Medium Low Density	374	59.8	6.3
High Density	67	3.4	19.9
Total	575	88	6.5

Exhibit 95. Estimate of residential capacity on unconstrained vacant and partially vacant buildable land, Tualatin Planning Area, 2018

Source: Buildable Lands Inventory; Calculations by ECONorthwest. Note1: DU is dwelling unit. Note2: Capacity in Basalt Creek uses the Basalt Creek Concept Plan's estimate of capacity (Exhibit 94).

Residential Plan Designations	Dwelling Units		
	Capacity (in City Limits)	Capacity (in Basalt Creek Concept Plan)	Capacity (Total)
Low Density	389	134	523
Medium Low Density	12	374	386
Medium High Density	13	-	13
High Density	218	67	285
High Density / High-Rise	-	-	-
Total	632	575	1,207

The amount of buildable land in Basalt Creek in the BLI (Exhibit 7) is more than the amount of buildable land from the Basalt Creek Concept Plan (Exhibit 94). The reason for the difference in capacity is primarily differences in assumptions about land constraints to development of vacant land. The Concept Plan assumed that more land would have soft constraints (that would decrease development capacity) and be unbuildable than the buildable lands inventory for this analysis.

Exhibit 96 shows an estimate of the additional capacity for development in Basalt Creek, if buildout occurs at densities consistent with development in Tualatin (the densities shown in Exhibit 91) and the amount of buildable land is consistent with the buildable lands inventory in this report (Exhibit 7). Under those conditions, Basalt Creek has capacity for 1,339 dwelling units, which is 764 dwelling units beyond the capacity in the Basalt Creek Concept Plan.

Exhibit 96. Estimate of additional residential capacity on unconstrained vacant and partially vacant buildable land, Basalt Creek, 2018

Source: Buildable Lands Inventory; Calculations by ECONorthwest. Note: DU is dwelling unit.

Residential Plan Designations	Capacity for Dwelling Units (using BLI)	Capacity for Dwelling Units (using Concept Plan)	Additional Capacity Potentially Available
Low Density	433	134	299
Medium Low Density	804	374	430
High Density	102	67	35
Total	1,339	575	764

Residential Land Sufficiency

The next step in the analysis of the sufficiency of residential land within Tualatin is to compare the demand for housing by Plan Designation (Exhibit 90) with the capacity of land by Plan Designation (Exhibit 95), which does **not** include the potential additional capacity in Basalt Creek discussed in Exhibit 96.

Exhibit 97 shows that Tualatin has sufficient land to accommodate development in the Low Density Plan Designation, Medium Low Density Plan Designation, and High Density Plan Designation – with a surplus of capacity for 57 dwelling units, 315 dwelling units, and 31 dwelling units respectively. Tualatin has a deficit of capacity for 109 dwelling units in the Medium High Plan Designation and a deficit of capacity for 101 dwelling units in the High Density High-Rise Plan Designation. **The land sufficiency results are inclusive of capacity of land in Basalt Creek but are not inclusive of capacity which may become available as redevelopment occurs.**

Exhibit 97. Comparison of capacity of existing residential land with demand for new dwelling units and land surplus or deficit, Tualatin City Limits and Basalt Creek, 2020 to 2040

Source: Buildable Lands Inventory; Calculations by ECONorthwest. Note: DU is dwelling unit.

Residential Plan Designations	Capacity (Dwelling Units)	Demand for New Housing	Remaining Capacity (Supply minus Demand)	Land Surplus or (Deficit) Gross Acres
Low Density	523	466	57	10
Medium Low Density	386	71	315	27
Medium High Density	13	122	(109)	(7)
High Density	285	254	31	2
High Density High-Rise	-	101	(101)	(4)

Tualatin’s surplus of Low Density Residential capacity (57 dwelling units) means that the City has an approximate surplus of 10 gross acres of Low Density land (at 5.7 dwelling units per gross acre). Tualatin’s surplus of Medium Low Density Residential capacity (315 dwelling units) means that the City has an approximate surplus of 27 gross acres of Medium Low Density land (at 11.7 dwelling units per gross acre).⁵⁸ Tualatin’s surplus of High Density Residential capacity (31 dwelling units) means that the City has an approximate surplus of two gross acres of High Density Land (at 20.5 dwelling units per gross acre).

This estimate of capacity does **not** include the potential additional capacity in Basalt Creek, shown in Exhibit 96. If Basalt Creek builds out with more housing than shown in the Concept Plan (shown in Exhibit 94), then Tualatin has about 764 dwelling units of additional capacity, all in Low Density, Medium Low Density, and High Density Plan Designations.

⁵⁸ This estimate of land is approximate, as densities in Medium Low Density may range from 11.7 to 9.5 dwelling units per gross acre depending on parcel size, as shown in Exhibit 91.

Conclusions and Recommendations

The key findings of the Tualatin Housing Needs Analysis are that:

- **Growth in housing will be driven by growth in households.** Households in Tualatin's city limits is forecast to grow from 10,791 households to 11,362 households, an increase of 571 households between 2020 and 2040. In that same time, households in Basalt Creek are forecast to grow from 203 households to 646 households, an increase of 443 households.
- **To accommodate households in Tualatin city limits and Basalt Creek, Tualatin is planning for 1,014 new dwelling units.** To accommodate the 1,014 dwelling units over the 20-year planning period, Tualatin will average 51 new dwelling units annually.
- **Tualatin will plan for more single-family attached and multifamily dwelling units in the future to meet the City's housing needs.** Historically, about 53% of Tualatin's housing was single-family detached. New housing in Tualatin is forecast to be 40% single-family detached, 15% single-family attached, and 45% multifamily.
 - The factors driving the shift in types of housing needed in Tualatin include changes in demographics and decreases in housing affordability. The aging of senior populations and the household formation of young adults will drive demand for renter- and owner-occupied housing, such as small single-family detached housing, townhouses, duplexes, and apartments / condominiums. Both groups may prefer housing in walkable neighborhoods, with access to services.
 - Tualatin's existing deficit of housing that is affordable for low- and high-income households indicates a need for a wider range of housing types, for renters and homeowners. About 37% of Tualatin's households have affordability problems, including a cost burden rate of 56% for renter households.
 - Without diversification of housing types, lack of affordability will continue to be a problem, possibly growing in the future if incomes continue to grow at a slower rate than housing costs. Under the current conditions, 307 of the forecasted new households will have incomes of \$40,700 (in 2018 dollars) or less (50% of MFI income or less). These households cannot afford market rate housing without government subsidy. Another 151 new households will have incomes between \$40,700 and \$65,120 (50% to 80% of MFI). These households will all need access to affordable housing, such as the housing types described above.
- **Tualatin cannot accommodate all of its housing needs.** Tualatin has a deficit of land in the Medium High Density and High Density High Rise Plan Designations, of 7 acres and 4 acres respectively. The deficits shown in Exhibit 97 may be addressed in multiple ways, such as by re-zoning land, increasing densities allowed in Plan Designations with deficits, or by accommodating housing in Plan Designations with surpluses.

- **Tualatin will need to meet the requirements of House Bill 2001.** The Legislature passed House Bill 2001 in the 2019 Legislative session. The bill requires cities within the Metro UGB to allow “middle” housing types in low-density residential zones. The bill defines middle housing types as: duplexes, triplexes, quadplexes, cottage clusters, and townhouses. To comply with House Bill 2001, Tualatin will need to:
 - Allow cottage cluster as a housing type in the Residential Low Density zone. Tualatin may want to allow cottage cluster housing in the Medium-Low Density and Medium-High Density zones. Tualatin will also need to include development standards in the Tualatin Development Code.
 - Allow duplexes, townhouses, and multifamily housing as a permitted use in the Residential Low Density zone.

Following is a summary of ECONorthwest’s recommendations to Tualatin based on the analysis and conclusions in this report. The *Tualatin Housing Strategy* memorandum presents the full list of recommendations for Tualatin.

- **Ensure an adequate supply of land that is available and serviceable.** Tualatin should evaluate opportunities to increase residential development densities by modifying the Development Code, such as increasing densities and height limits in higher density zones. Tualatin should identify opportunities to re-zone land, from lower density usage to higher density usage, to provide additional opportunities for multifamily housing development. Tualatin should plan for long-term development of housing in Tualatin through 2040 and beyond by working with Metro on upcoming Growth Management reports.
- **Encourage development of a wider variety of housing types.** Tualatin should allow duplexes, triplexes, quadplexes, cottage clusters, and townhouses in the Residential Low Density zone and allow cottage cluster housing in the Medium-Low Density and Medium-High Density zones (which already allow for the other housing types mentioned). These changes should be made in a way that makes the City’s zoning code compliant with House Bill 2001.
- **Support development and preservation of housing that is affordable for all households.** The City should develop policies to support development of housing affordable to people who live and work in Tualatin. The City should identify opportunities to leverage resources (including funding) from the Metro Bond to support development of housing affordable to households earning less than 60% of Median Family Income in Washington County (\$48,900 for a household size of four people). The City should develop policies to prevent and address homelessness, as well as to prevent and mitigate residential displacement resulting from redevelopment and increases in housing costs. These actions will require Tualatin to evaluate adoption of a wide variety of housing policies such as creative financing opportunities for systems development charges, evaluating tax exemption programs, participating in a land bank, and other approaches to supporting development of housing affordable at all income levels.

- **Identify funding tools to support residential development.** The City should evaluate tools such as establishing a new Urban Renewal District and evaluate establishing a construction excise tax.
- **Identify redevelopment opportunities.** The City should identify districts within Tualatin with opportunities for redevelopment for both housing and employment uses, as well as supporting redevelopment of underutilized commercial buildings for housing.
- **Ensure there are connections between planning for housing and other community planning.** Throughout the project, stakeholders emphasized the need to coordinate housing planning with economic development planning, transportation planning, and other community planning. Updates to the Tualatin Transportation System Plan should be coordinated with planning for housing growth. A key approach to accommodating new residential development is redevelopment that results in mixed-use districts, providing opportunities for more housing affordable to people working at businesses in Tualatin and living closer to work (thus reducing transportation issues). In addition, stakeholders would like to see the incorporation of services needed to meet daily needs of residents of neighborhoods without driving.

The *Tualatin Housing Strategy* memorandum presents more details about each of these topics and recommendations for specific actions to implement these recommendations.

Appendix A – Residential Buildable Lands Inventory

The general structure of the standard method BLI analysis is based on the DLCD HB 2709 workbook “*Planning for Residential Growth – A Workbook for Oregon’s Urban Areas*,” which specifically addresses residential lands.⁵⁹ The steps and sub-steps in the supply inventory are:

1. Calculate the gross vacant acres by plan designation, including fully vacant and partially vacant parcels.
2. Calculate gross buildable vacant acres by plan designation by subtracting unbuildable acres from total acres.
3. Calculate net buildable acres by plan designation, subtracting land for future public facilities from gross buildable vacant acres.
4. Calculate total net buildable acres by plan designation by adding redevelopable acres to net buildable acres.

The methods used for this study are consistent with many others completed by ECONorthwest that have been acknowledged by DLCD and LCDC.

Overview of the Methodology

The BLI for Tualatin is based on the data and methods used by Metro. In addition, ECONorthwest’s approach updated Metro’s results to account for new development (the Metro 2018 UGR is based on 2016 data) and other potential local conditions, such as unique environmental constraints.

Study Area

The BLI for Tualatin includes all residential land designated in the comprehensive plans within city limits and designated planning areas (referred to as Tualatin Planning Area). ECONorthwest used the most recent tax lot shapefile from Metro’s Regional Land Information System (RLIS) for the analysis.

Inventory Steps

The BLI consisted of several steps:

1. Generating UGB “land base”
2. Classifying land by development status

⁵⁹ We note that Newberg is not required to comply with ORS 197.296.

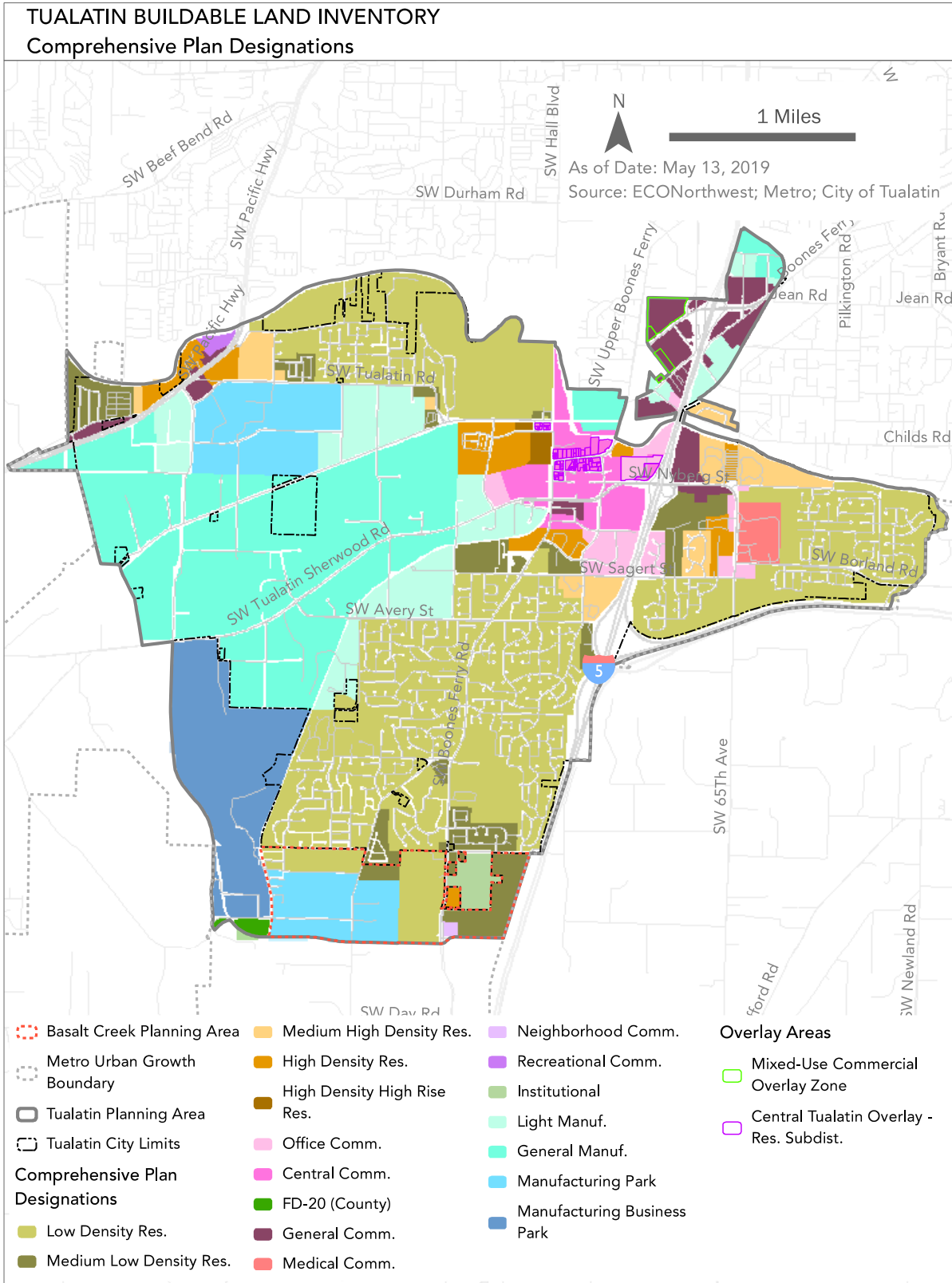
3. Identify constraints
4. Verify inventory results
5. Tabulate and map results

Step 1: Generate “land base.”

Per Goal 10 this involves selecting all of the tax lots with residential and other non-employment Plan Designations where residential uses are planned for and allowed by the implementing zones. The City provided ECO with their Comprehensive Plan GIS files and indicated what designations should be included within the inventory.

Exhibit 98 (on the following page) shows Comprehensive Plan designations for the City of Tualatin. This BLI includes lands in the Low Density Residential, Medium Low Density Residential, Medium High Density Residential, High Density Residential, and High Density High Rise Residential Plan Designations. The BLI also includes areas that allow residential use in the Basalt Creek Planning Area, Mixed-Use Commercial Overlay Zone, and Central Tualatin Overlay.

Exhibit 98. Comprehensive Plan Designations, Tualatin Planning Area, 2019



Step 2: Classify lands.

In this step, ECONorthwest classified each tax lot with a plan designation that allows residential uses into one of four mutually exclusive categories based on development status:

- Vacant
- Partially Vacant
- Public or Exempt
- Developed

ECONorthwest used the classification determined through Metro’s model: Vacant, Ignore, and Developed. In addition, ECO included a new classification for partially vacant lots. The definitions for each classification are listed below.

Development Status	Definition	Statutory Authority
Vacant	Tax lots designated as vacant by Metro based on the following criteria: 1) Fully vacant based on Metro aerial photo 2) Tax lots with less than 2,000 square feet developed AND developed area is less than 10% of lot 3) Lots 95% or more vacant from GIS vacant land inventory	OAR 660-008-0006(2) “Buildable Land” means residentially designated land within the urban growth boundary, including both vacant and developed land likely to be redeveloped, that is suitable, available and necessary for residential uses.
Partially Vacant	Single-family tax lots that are 2.5 times larger than the minimum lot size and a building value less than \$300,000 or lots that are 5 times larger than the minimum lots size (no threshold for building value). These lots are considered to still have residential capacity. For this analysis, we are classifying these lots as Partially Vacant. We assume that 0.25 acres of the lot is developed, and the remaining land is available for development, less constraints.	OAR 660-008-0006(2)
Ignore (Public or Exempt uses)	Lands in public or semi-public ownership are considered unavailable for residential development. This includes lands in Federal, State, County, or City ownership as well as lands owned by churches and other semi-public organizations and properties with conservation easements. These lands are identified using the Metro’s definitions and categories.	OAR 660-008-0005(2) - Publicly owned land is generally not considered available for residential uses.
Developed	Lands not classified as vacant, partially vacant, or public/exempt are considered developed. Developed land includes lots with redevelopment capacity, which are also included in BLI. The unit capacity of developed but redevelopable lots is based on Metro’s estimates.	OAR 660-008-0006(2) “Buildable Land” means residentially designated land within the urban growth boundary, including both vacant and developed land likely to be redeveloped, that is suitable, available and necessary for residential uses.

Step 3: Identify constraints

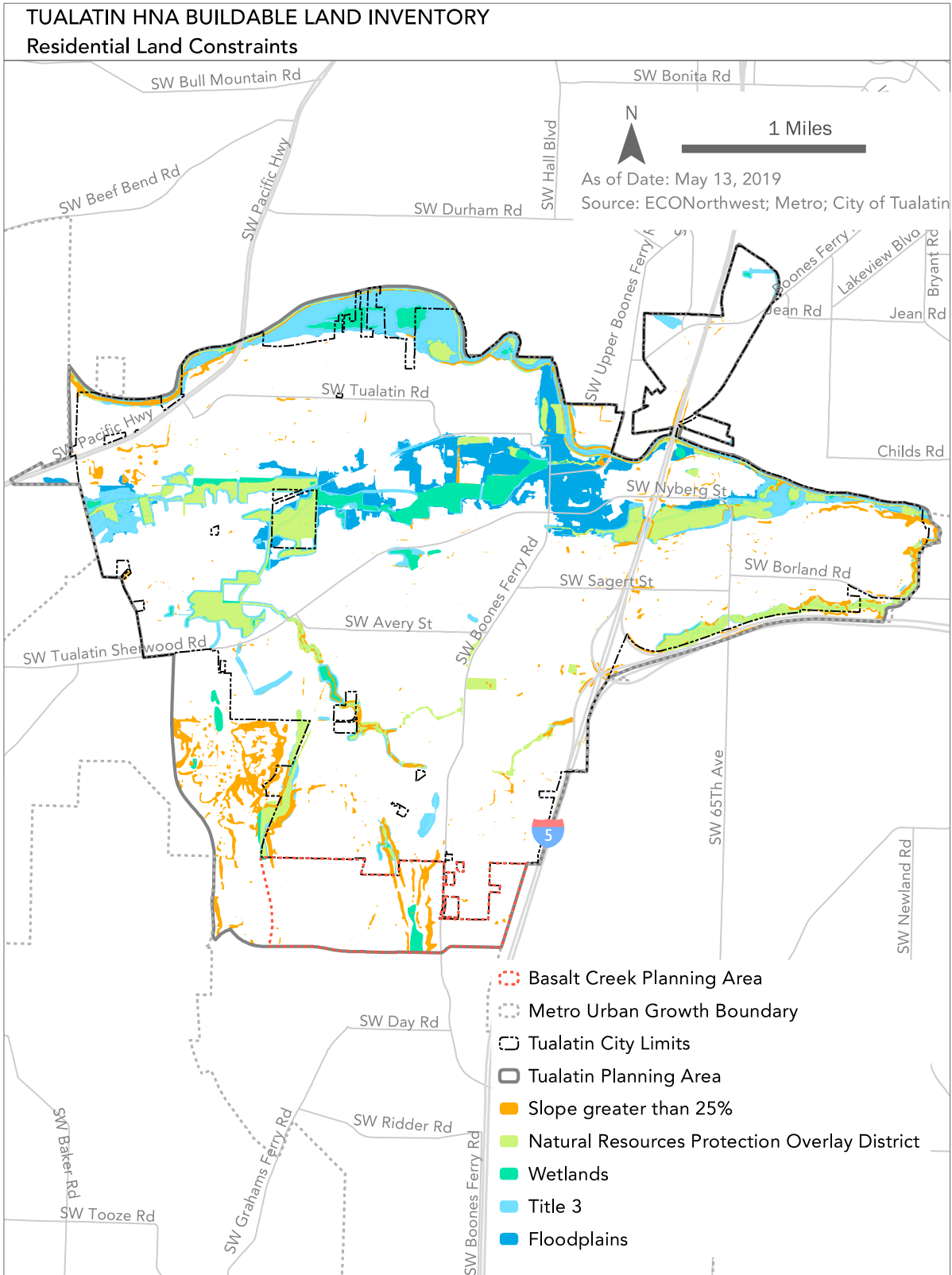
Consistent with OAR 660-008-0005(2) guidance on residential buildable lands inventories, ECO deducted certain lands with development constraints from vacant lands. We used some of the constraints established in Metro’s methodology, with modifications to fit local considerations in Tualatin. These constraints are summarized in the table below.

Constraint	Statutory Authority	Threshold
Goal 5 Natural Resource Constraints		
Natural Resources Protection Overlay District	OAR 660-008-0005(2)	Areas in the NRPOD
Riparian Corridors	OAR 660-015-0000(5)	Areas protected by the Stream and Floodplain Plan
Wetlands		
Natural Hazard Constraints		
100 Year Floodplain	OAR 660-008-0005(2)	Lands within FEMA FIRM 100-year floodplain
Steep Slopes	OAR 660-008-0005(2)	Slopes greater than 25%

The lack of access to water, sewer, power, road or other key infrastructure cannot be considered a prohibitive constraint unless it is an extreme condition. This is because tax lots that are currently unserviced could potentially become serviced over the 20-year planning period.

Exhibit 99 maps the development constraints used for the residential BLI.

Exhibit 99. Development Constraints, Tualatin Planning Area, 2019



Step 4: Verification

ECO used a multi-step verification process. The first verification step will included a “rapid visual assessment” of land classifications using GIS and recent aerial photos. The rapid visual assessment involves reviewing classifications overlaid on recent aerial photographs to verify uses on the ground. ECO reviewed all tax lots included in the inventory using the rapid visual assessment methodology. The second round of verification involved City staff verifying the rapid visual assessment output. ECO amended the BLI based on City staff review and comments, particularly related to vacant land developed since 2016.

Step 5: Tabulation and mapping

The results are presented in tabular and map format. The Tualatin Residential BLI includes all residential land designated in the Comprehensive Plan within the Tualatin Planning Area. From a practical perspective, this means that ECONorthwest inventoried all lands within tax lots identified by Metro that fall within the Tualatin Planning Area. The inventory then builds from the tax lot-level database to estimates of buildable land by Plan Designation.

Tualatin

Housing Production Strategy

August 10 2021

Prepared for: City of Tualatin

Final Report

ECONorthwest

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Executive Summary

This report presents a housing production strategy (HPS) for the City of Tualatin. A housing production strategy is intended to include goals and strategic actions to work together to achieve equitable outcomes for all residents of Tualatin, with an emphasis on improving outcomes for underserved communities, people with lower incomes, and people in state and federal protected classes.¹ This report is intended to meet the requirements of OAR 660-008, as described within the report.

The HPS is intended to address the housing needs identified in the *Tualatin Housing Needs Analysis* (HNA) in 2019, which concluded that Tualatin has very limited land to accommodate future housing growth and that housing needs are changing as a result of demographic changes and need for affordable housing. Specifically, the HNA concluded:

- **Tualatin is forecasted to increase its housing by about 1,014 new dwelling units between 2020 and 2040.**
- **Changes in demographic characteristics will drive need for new housing.** The HNA forecast that Tualatin would need more attached and multifamily housing in the future than the current housing stock provides. The factors driving the shift in types of housing needed in Tualatin include changes in demographics, such as growing senior populations, and the household formation of young adults.

Tualatin has an existing deficit of housing that is affordable to low and moderate-income households and is likely to have similar future deficits. Tualatin's existing deficit of housing to meet the needs of extremely low to low-income households indicates a need for subsidized affordable housing for renters and affordable homeownership. Moderate income households may benefit from a wider range of housing types, but housing types alone do not necessarily bring the cost down for renters or homeowners. Without the types of solutions proposed in this report, lack of affordability will continue to be a problem and will possibly grow, in the future, if incomes continue to grow at a slower rate than housing costs.

- **Tualatin has a limited amount of vacant, unconstrained buildable residential land, particularly for higher-density multifamily housing.** Tualatin has about 244 acres of vacant, unconstrained buildable land. About 64% of vacant land is in Low Density Residential, 29% is in Medium Low Density Residential, and 8% of land in areas that allow higher-density multifamily housing such as Medium High Density, High Density, High Density High-Rise, and commercial area.

¹ Federal protected classes include race, color, national origin, gender, familial status, and disability. Oregon's additional protected classes include marital status, source of income, sexual orientation, and status as a domestic violence survivor. Under Fair Housing laws, it is illegal to deny access to housing based on the characteristics of people within these protected classes.

- **Tualatin cannot accommodate all of its housing needs on existing vacant land.** Tualatin has a land deficit of seven acres and four acres in the Medium High Density and High Density High Rise Plan Designations, of 7 acres and 4 acres respectively.

The HPS is intended to establish a framework for the evaluation and potential development of policies and strategic actions that address the housing needs described above over a six-year period. Key findings of the HPS are that Tualatin needs:

- **Increased housing diversity.** Nearly two-thirds of Tualatin’s housing stock is single-family detached housing. The City’s demographic and socioeconomic characteristics suggest a need for a wide variety of housing types to meet the needs of a growing and diverse pool of existing and future residents.
- **Greater housing affordability and availability for homeowners.** Tualatin’s homeownership stayed static from 2000 to 2017 at about 55%, however, it was lower than Washington County’s (61%) and the Portland Region’s (60%) homeownership rate. These statistics highlight a potential need for greater homeownership opportunities as homeownership continues to be one of the most effective (and primary ways) for households and individuals to build wealth.
- **Greater housing affordability and availability for renters.** Competition for lower-priced affordable units in Tualatin is strong and many cannot afford these rents or housing sales prices without cost burdening themselves. In the 2013-2017 period, about 56% of Tualatin’s renters were cost burdened, with 26% severely cost burdened.² Renters, especially those with lower incomes, are at risk of being displaced through increases in rental costs.
- **Increased income-restricted regulated, emergency, and supportive housing.** Tualatin has about 604 rent-restricted affordable housing units (accounting for about 5% of Tualatin’s housing stock) but has about 1,753 households experiencing severe housing cost burden in the city. Washington County has about 530 people experiencing homelessness, about 300 of whom are unsheltered. About 44 people experiencing homelessness are estimated to live in the Tualatin and Tigard area.
- **Need for housing for people to live and work in Tualatin.** Tualatin’s Economic Opportunities Analysis report (December 2019) reported that 93% of people working in Tualatin lived in another community (such as Portland, Tigard, Beaverton, or Hillsboro) and commuted into Tualatin each day. Some people who work in Tualatin can afford rent or homeownership in Tualatin, but some would be cost burdened in Tualatin.

This analysis finds disproportionate housing needs for seniors, people of color, people with one or more disabilities, and people experiencing homelessness. Washington County’s Consolidated

² A household is said to be cost burdened if they spend 30% or more of their gross income on housing costs. A household is said to be severely cost burdened if they spend 50% or more of their gross income on housing costs.

Plan identifies all of these groups as a priority with special housing needs. The following groups have greater-than-average housing needs:

- **Seniors.** People 65 years of age and older are disproportionately cost burdened compared to the average household—many living on fixed incomes in a region with increasing housing costs. Over the next twenty years, people over 65 years are expected to be the fastest-growing age group. As this group grows, Tualatin will need more housing that is affordable, physically accessible, and in proximity to needed services (such as nearby health care or in-home assistance). Seniors will also need improved access to housing without discrimination, especially seniors of color.
- **People of color.** About 25% of Tualatin’s population identified as a person of color, who are more likely to be cost burdened when compared to the average household. Broadly, the housing needs for many people of color in Tualatin include improved access to affordable housing units, assistance to avoid displacement, access to housing in locations with “high opportunity” (such as areas near jobs, transit, or services), and access to housing without discrimination.
- **People with disabilities.** Across the Portland Region, people with one or more disabilities experience disproportionate cost burden. Housing needs of people with one or more disabilities vary by type of disability. But in general, housing needs include improved access to an affordable unit, improved physical access to housing units, access to housing with needed services, and access to housing without discrimination.
- **People experiencing homelessness.** People experiencing homelessness are disproportionately affected by the lack of affordable housing. Housing needs for people experiencing homelessness vary by reason for homelessness. In Washington County, the primary reason cited for experiencing homelessness was inability to afford housing. The broad housing needs for this group include the need for immediate assistance (e.g., rent support), permanent supportive housing (with services), and improved access to an affordable unit.

Summary of Goals and Strategic Actions

The HPS presents goals and strategic actions to address the housing needs described above. Implementation of the HPS is expected to occur over a six-year period. Each strategic action will require further consideration, such as additional analysis, engagement of consultants, changes to existing standards or programs, discussions with decision makers, or public hearings. The City may be unable to or not chose to implement some strategic actions because of new information that arises from a detailed evaluation of the specifics of each strategic action. In that case, the City may identify a different action (or actions) to meet the specific housing need addressed by the strategic action.

Exhibit 1 presents a summary of the goals and strategic actions and includes the following information:

- **Goal or strategic action.** This is either the text of the goal or a short summary of the strategic action. Chapter 3 of the report presents additional information about each goal and a description of each strategic action.
- **Incomes of populations served by each strategic action.** Income is based on Median Family Income (MFI) as defined by the US Department of Housing and Urban Services (HUD) for Washington County. The example below is for a family of four people. The HUD terms used to describe housing by income group are:
 - Extremely Low Income: Less than 30% MFI, \$28,000 or less for a family of four
 - Very Low Income: 31% to 50% of MFI, \$28,000 to \$46,000 for a family of four
 - Low Income: 51% to 80% of MFI, \$46,000 to \$74,000 for a family of four
 - Moderate Income: 81% to 120% of MFI, \$74,000 to \$110,000 for a family of four
 - High Income: 121% of MFI or more, \$110,000 or more for a family of four
- **Potential magnitude of the action for producing new housing.** This is an estimate of the amount of new housing that may be produced over the six-year period as a result of each strategic action. The magnitudes of impact are:
 - A **low** magnitude is anticipated production of 1% or less of the needed new units (1,014 units) or about 10 dwelling units over the six-year period. A low magnitude does not mean a strategic action is unimportant. Some strategic actions are necessary but not sufficient to produce new housing.
 - A **moderate** magnitude is anticipated production of 1% to 5% of the needed new units (1,014 units) or about 10 to 50 dwelling units over the six-year period.
 - A **high** magnitude is anticipated production of 5% or more of the needed new units (1,014 units) or 50 or more dwelling units over the six-year period.
- **Expected year of adoption.** The HPS will be implemented over a six-year period. Each strategic action will be evaluated, and if the City chooses to implement it, then it would be adopted or would have some other official acknowledgement that the City is going to execute the strategic action.

Exhibit 1. Summary of Goals and Strategic Actions

Goal and Strategic Actions	Income Levels Served (MFI)	Magnitude of Impact	Expected Year of Adoption
1. Affordable Housing: Strongly prioritize, encourage, and support affordable rental housing development to increase affordable housing for households earning 0-60% Median Family Income.			
1.a Evaluate a Low-Income Housing Property Tax Exemption Program for Affordable Rental Housing	0-60%	Moderate	2023
1.b Evaluate Changes to Systems Development Charges	0-80%	Low	2026
1.c Evaluate Implementation of a Construction Excise Tax (CET)	Mostly 0-60% Possibly 61-80%	Moderate	2025
1.d Evaluate Support for Affordable and Workforce Rental Housing as part of Urban Renewal	0-80%	Moderate to large	2022
1.e Evaluate Financial Resources for Local Contributions to Affordable Housing Development	0-60%	Moderate	2026
1.f Evaluate Buildable or Redevelopable Public and Institutional Land Potentially Suitable for Affordable Housing	0-60%	Moderate	2023
1.g Evaluate Development Code Changes to Allow and Support Other Affordable Rental Housing Types in Tualatin	0-80%	Indirect, low	2024
1.h Evaluate Municipal Code, Development Code, Public Works Construction Code, and Building Code Processes to Make Building Affordable Housing Easier	0-60%	Low	2024
2. Affordable Homeownership: Encourage and support affordable homeownership to create opportunities for wealth creation.			
2.a Evaluate Impediments to Homeownership and Their Removal	0-120%	Indirect, low	2024
2.b Partner to Encourage Education about Homeownership Opportunities	0-120%	Low to moderate	2022
2.c Partner with Organizations that Develop Affordable Ownership Housing	0-80%	Low to moderate	2023
2.d Evaluate Development Code to Encourage Diverse Housing Types for Affordable Homeownership	0-120%	Indirect, low	2024
3. Preservation of Regulated Affordable Housing: Preserve affordable housing to prevent the loss of existing affordable housing units and to prevent resident displacement.			
3.a Evaluate How to Support Preservation of Regulated Affordable Rental Housing	0-60%	Moderate	2025
3.b Evaluate Developing a Healthy Housing Initiative for Multifamily Housing	0-80%	Moderate to large	2024

Goal and Strategic Actions	Income Levels Served (MFI)	Magnitude of Impact	Expected Year of Adoption
4. Preservation of Naturally Occurring Affordable Housing (NOAH): Preserve naturally occurring affordable housing, where possible, to prevent loss of affordable units and to mitigate resident displacement.			
4.a Evaluate Development of Incentives to Preserve Low-Cost Rentals for Below-Market-Rate Privately Owned Rental Housing	0-80%	Moderate	2026
4.b Evaluate Using the Multiple Unit Property Tax Exemption to Slow Rental Cost Increases	0-80%	Moderate	2026
5. Housing for Underserved Communities: Implement housing policies, projects, programs, and partnerships to further support racial and social equity.			
5.a Consider Development of a Funding Action Plan to Implement the HPS with Attention to Equity	Emphasis on 120% and below	Indirect, large	2023
5.b Evaluate Impediments to Fair Housing to Create an Analysis of Impediments	All income groups	Moderate	2024
5.c Evaluate Ways to Best Ensure Opportunities for Education about Fair Housing Are Provided	All income groups	Moderate	No adoption needed
5.d Evaluate Strategies to Encourage Diverse Housing Types in High-Opportunity Neighborhoods	0-80%	Moderate	2024
6. Workforce Housing: Encourage, plan for, and support the development of workforce housing for households earning 61-80% Median Family Income for both owner and renter, in order to increase the jobs-housing balance, reduce commute time, and provide attainable housing for workers in Tualatin.			
6.a Evaluate Ways to Incentivize Inclusion of Workforce Housing Units within New Multifamily Rental Development	61-80%	Moderate	2026
6.b Evaluate Potential Partnerships with Employers on Employer-Assisted Housing	Less than 120%	Low to moderate	No adoption needed
6.c Evaluate City Partnership to Participate in a Land Bank	0-80%	Low to moderate	2024
7. Housing Stabilization: Prevent and address homelessness to provide safe living conditions for everyone living in Tualatin.			
7.a Evaluate Opportunities to Partner on a Local Rental and Utility Assistance Program	0-80%	Moderate	No adoption needed
7.b Evaluate Ways to Develop Housing Options and Services to Address and Prevent Houselessness	0-30%	Moderate	2026
8. Housing Rehabilitation: Plan for and support housing programs and initiatives that are responsive to the safety and health needs of households earning 0-80% of Median Family Income.			

Goal and Strategic Actions	Income Levels Served (MFI)	Magnitude of Impact	Expected Year of Adoption
8.a Evaluate Establishing Local Housing Rehabilitation Program	0-80%	Low to moderate	2026
8.b Evaluate the Implementation of a Healthy Housing Initiative for Single-Family Housing	0-80%	Moderate to large	2024
9. Accessible Design and Other Specialized Design: Encourage and support Universal Design, Lifelong Housing Certification, and other similar standards.			
9.a Evaluate the Development of Specialized Design Standards and Incentives to Accommodate Special Needs	For Standards: All income groups For Incentives: income qualifying level TBD.	Low	2024
10. Mixed-Use Housing and Redevelopment: Encourage and support development of mixed-use, mixed-income, and multifamily housing in commercial zones and urban renewal areas for households earning 0-80% Median Family Income.			
10.a Evaluate Redevelopment Opportunities for the Creation of Mixed-Use Development Districts to Support Development of Affordable Housing and Workforce Housing	0-80%	Large	2022
10.b Evaluate Opportunities for Conversion of Commercial Buildings to Residential Uses	0-80%	Low to moderate	2023
10.c Evaluate Opportunities to Rezone Land for Mixed-Use	All income groups	Large	2022
10.d Evaluate Establishing Incentives to Support Mixed-Use Development, such as the Vertical Housing Tax Abatement	Typically, over 80% unless affordable housing	Moderate	2023
11. Regulatory and Zoning Changes: Increase housing development opportunities through regulatory and zoning changes to accommodate a diverse range of housing types and price points to meet the housing needs in Tualatin.			
11.a Evaluate Updating Density Standards for Multifamily Housing in Medium-Density, High-Density, and Mixed-Use Zones	All income groups	Large	2022

Goal and Strategic Actions	Income Levels Served (MFI)	Magnitude of Impact	Expected Year of Adoption
11.b Evaluate Opportunities to Rezone Lower-Density Residential Land to Higher Density	All income groups	Moderate to large	2022
11.c Evaluate the Feasibility of Targeted Reductions to Off-Street Parking Requirements	All income levels	Moderate	2022
11.d Evaluate Updating Code to Allow Small Dwelling Unit Developments	Less than 100%	Low	2024
11.e Evaluate Adopting an Expedited Permitting Process for Affordable Rental Housing and Affordable Homeownership	0-80%	Low to moderate	2023
11.f Evaluate Providing Additional Engagement and Information to Developers of Affordable Housing	0-60%	Low to moderate	2022
12. Transportation and Public Infrastructure: Plan for and develop transportation and public infrastructure to support affordable housing, workforce housing, mixed-use housing, and mixed-income housing.			
12.a Evaluate Ways to Prioritize Capital Improvements Programming for Affordable and Workforce Housing	0-80%	Moderate	2023

1. Introduction

A Housing Production Strategy is intended to include goals and strategic actions to work together to achieve equitable outcomes for all residents of Tualatin, with an emphasis on improving outcomes for underserved communities, people with lower incomes, and people in state and federal protected classes. Fair housing law is intended to provide access to housing choice for everyone, free from discrimination. Federal protected classes are: race, color, national origin, gender, familial status, and disability. Oregon's additional protected classes are: marital status, source of income, sexual orientation, and status as a domestic violence survivor. Under Fair Housing laws, it is illegal to deny access to housing based on the characteristics of people within these protected classes.

The Tualatin Housing Production Strategy presents information about Tualatin's housing needs (including the housing needs of people disproportionately affected by insufficient access to affordable housing) and presents goals and strategic actions to address these housing needs. This report is intended to meet the requirements of OAR 660-008, which are presented below.

Background

Tualatin is a city with a unique role and location within the Portland Region. The city is located at the southern portion of the region, along Interstate 5 and very near the intersection of Interstate 5 and Interstate 205. Tualatin had about 27,200 residents in 2020 and approximately 40,500 employees at businesses located in Tualatin.³ Commuting is common in the Portland Region and in Tualatin. In Tualatin, approximately 93% of working people commute out and 7% of working people who live in Tualatin also work in Tualatin.⁴

Tualatin completed the Tualatin Housing Needs Analysis (HNA) in 2019, which concluded that Tualatin has very limited land to accommodate future housing growth and that housing needs are changing as a result of demographic changes and the need for affordable housing.⁵ Specifically, the analysis concluded:

- **Tualatin is forecasted to increase its housing by about 1,014 new dwelling units between 2020 and 2040.** This is anticipated to occur within the city limits (571 new households) and in the Basalt Creek Area (443 new households).

³ The population estimate from the Portland State University Population Research Center Annual Population Estimate. The employment estimate is based on the Tualatin Economic Opportunities Analysis report.

⁴ US Census Bureau, Census On the Map, 2015

⁵ Throughout this report, we use information from the Tualatin Housing Needs Analysis report, which is largely based on information from the 2013-2017 US Census Bureau American Community Survey. We updated data about housing sales costs and rents, as they have changed meaningfully since completion of the Housing Needs Analysis. This report does not incorporate data specifically about the impacts of the COVID-19 pandemic on housing affordability because newer information is unavailable on a city level. It is reasonable to assume that, since completion of the HNA, more households are struggling to afford housing.

- **Changes in demographic characteristics will drive the need for new housing.** The HNA forecast that Tualatin would need more attached and multifamily housing in the future than the current housing stock provides. The HNA forecast that 40% of new housing would be single-family detached, 15% single-family attached, and 45% multifamily. The factors driving the shift in types of housing needed in Tualatin include changes in demographics. The aging of senior populations and the household formation of young adults will drive demand for renter and owner-occupied housing, such as small single-family detached housing, town houses, duplexes, and apartments/condominiums. Both groups may prefer housing in walkable neighborhoods with access to services.
- **Tualatin has an existing deficit of housing that is affordable to low and moderate-income households and is likely to have similar future deficits.** Tualatin’s existing deficit of housing to meet the needs of extremely low to low-income households indicates a need for subsidized affordable housing for renters and affordable homeownership. Moderate income households may benefit from a wider range of housing types, but housing types alone do not necessarily bring the cost down for renters or homeowners. As of 2017, about 37% of Tualatin’s households were cost burdened,⁶ including a cost-burden rate of 56% for renter households. As the Tualatin HNA was completed prior to the occurrence of the Covid-19 pandemic in 2020-2021, and the data in this report is based largely on that HNA, it does not include cost-burden data for that more recent period. It is reasonable to assume that, since completion of the HNA, more households are struggling to afford housing.

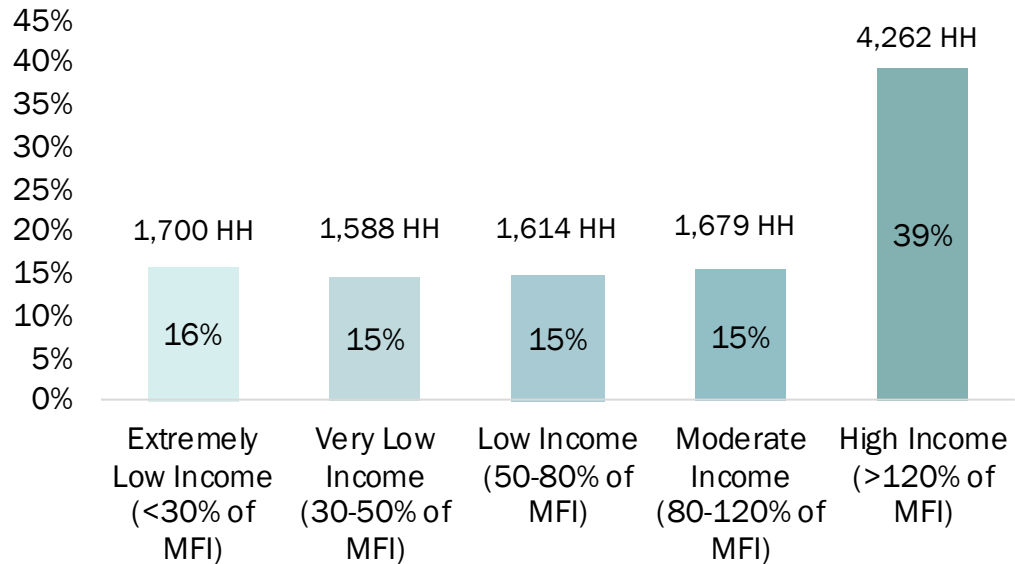
Exhibit 2 shows that 31% of Tualatin’s households had incomes less than 50% of MFI (\$41,000) and cannot afford a two-bedroom apartment at Washington County’s Fair Market Rent (FMR) of \$1,330 in 2018.

⁶ A household is considered cost burdened if they pay 30% or more of their gross income on housing costs, such as rent, selected utilities like electricity and heating, and mortgage/interest/insurance. A household is severely cost burdened if they spend 50% or more of their gross income on housing costs

Exhibit 2 Share of Households, by Median Family Income (MFI) for Washington County (\$81,400), Tualatin, 2018

Source: US Department of Housing and Urban Development, Washington County, 2018. US Census Bureau, 2013-2017 ACS Table 19001.

Note: Exhibit 2 was based on information from Tualatin's Housing Needs Analysis, with corrections (to fix errors) to the number of existing dwelling units in each income category.



Without the types of solutions proposed in Chapter 3 of this report, lack of affordability will continue to be a problem and will possibly grow in the future if incomes continue to grow at a slower rate than housing costs. Under the current conditions, 307 of the forecasted new households will have incomes of \$40,700 (in 2018 dollars) or less (50% of MFI income or less). These households cannot afford market-rate housing and have the largest unmet housing need. Another 151 new households will have incomes between \$40,700 and \$65,120 (51% to 80% of MFI). All tiers of low-income households need access to subsidized affordable housing or stable below-market-rate housing to be able to afford housing.

- Tualatin has a limited amount of vacant, unconstrained buildable residential land, particularly for higher-density multifamily housing.** Tualatin has about 244 acres of buildable, unconstrained vacant land. About 64% of vacant land is in Low Density Residential and 29% is in Medium Low Density Residential, both of which allow single-family detached housing and will allow multifamily housing types (such as duplexes, triplexes, quadplexes, and town houses) when the City implements HB 2001. This leaves a very small amount of land (about 19 acres) in areas that allow higher-density multifamily housing such as Medium High Density, High Density, High Density High-Rise, and commercial area.
- Tualatin cannot accommodate all of its housing needs on existing vacant land.** Tualatin has a deficit of land in the Medium High Density and High Density High Rise Plan Designations, of 7 acres and 4 acres respectively. The deficits may be addressed in multiple ways, such as by re-zoning land, increasing densities allowed in Plan

Designations with deficits, or by accommodating housing in Plan Designations with surpluses. These options are included in the strategic actions in this report.

Housing Production Strategy Purpose

The Housing Production Strategy is intended to establish a framework for the evaluation and potential development of policies and strategic actions that address Tualatin’s housing needs. Throughout this report, we discuss housing income based on Median Family Income (MFI) as defined by the US Department of Housing and Urban Services (HUD) for Washington County. The example below is for a family of four people. The information used in this report is generally from the Tualatin HNA, which presents data current as of 2018.⁷ The information about Median Family Income below (and throughout the report) use the 2020 MFI for Washington County (\$92,000). The HUD terms used to describe housing by income group are:⁸

- Extremely-Low Income: Less than 30% MFI or \$28,000 or less for a family of four
- Very-Low Income: 31% to 50% of MFI or \$28,000 to \$46,000 for a family of four
- Low Income: 51% to 80% of MFI or \$46,000 to \$74,000 for a family of four
- Moderate Income: 81% to 120% of MFI or \$74,000 to \$110,000 for a family of four
- High Income: 121% of MFI or more \$110,000 or more for a family of four

Throughout this report, the term “workforce housing” is used. In this report, it generally refers to housing affordable at 61% to 80% of MFI.

⁷ The date ranges for data vary, with much of the information from the HNA from the U.S. Census 2013-2017 period. In some cases, the report presents data from the 2000 or 2010 Decennial Census to provide historical context. In some cases the report uses more updated data for things like housing sales prices, rents, median family income, people experiencing homelessness, and other subjects.

⁸ The actual income limits on specific affordable housing programs, such as LIHTC or CDBG HOME, vary by program. As the City implements the strategic actions presented in this report, the City will need to understand the income limitations of different programs.

Requirements of a Housing Production Strategy

OAR 660-008 describes the requirements of a Housing Production Strategy (HPS) in sections 660-008-0050 through 660-008-0070. This section briefly describes these requirements and review by staff with the Department of Land Conservation and Development (DLCD).

The HPS is required to include the following information. We have noted what chapter this information is included in this report:

- **Contextualized Housing Need and Engagement** (Chapter 2 in this report) should provide information about the socioeconomic and demographic trends of households in Tualatin, the policies the City has adopted to meet housing needs, and a summary of engagement the City has had with stakeholders about housing needs.
- **Strategies to Meet Future Housing Need** (Chapter 3 in this report) identifies specific actions, measures, and policies needed to address housing needs identified in Tualatin's HNA report.
- **Achieving Fair and Equitable Housing Outcomes** (Chapter 4 in this report) evaluates the entire list of strategies to achieve equitable outcomes. The valuation considers factors such as location of housing, affirmatively furthering Fair Housing, facilitating housing choice, identifying housing options for residents experiencing homelessness, supporting development of affordable housing, and increasing housing stability.

The City is required to submit the HPS to DLCD after its adoption by the City Council. Then the City is required to monitor progress on implementation of the HPS and progress on production of housing related to the policies and strategic actions in this report. Linking housing development directly to implementation of the strategic actions in this report may be challenging and difficult to quantify. But City staff will be able to report changes in building activity that occurs before and after implementation of specific strategic actions and will be able to provide qualitative feedback on implementation of strategic actions based on development of partnerships and discussions with stakeholders.

Tualatin will be required to submit a report to DLCD three years after the City adopts the HPS, which includes:

- A **summary** of the strategic actions taken by that time. For strategic actions not adopted on the schedule in the HPS, the City must provide an explanation of the circumstances that posed a barrier to implementation and a plan for addressing the need identified in the strategy.
- An **evaluation** of the efficacy of the strategic actions that the City has implemented for meeting the needs in the HNA and whether the strategic actions are moving the City to achieve more fair and equitable housing outcomes.

Implementation of the HPS will take time because each strategic action will require further consideration, such as additional analysis, engagement of consultants, changes to existing

standards or programs, discussions with decision-makers, or public hearings. The City may be unable to or chose not to implement some strategic actions because of new information that arises from a detailed evaluation of the specifics of each strategic action.

If the City is unable to or chooses not to implement a strategic action within 90 days of the timeline proposed in the HPS, the City must notify DLCD about the action(s) that the City is taking to address this issue. The City may propose an alternative schedule for implementing the strategic action or may identify a different action (or actions) to meet the specific housing need addressed by this strategic action.

Structure of the Report

This report is organized as follows:

- **Chapter 2. Contextualizing Housing Need** summarizes the findings about housing need in Tualatin, with a focus on housing need at varying income levels and housing needs of specific groups of people
- **Chapter 3. Strategies to Meet Future Housing Need** presents the proposed goals and strategic actions to meet the housing need described in Chapter 2.
- **Chapter 4. Evaluation of the Housing Production Strategy for Achieving Fair and Equitable Housing Outcomes** presents an evaluation of the HPS through considerations of the location of housing, Fair Housing, housing choice, and other factors.
- **Appendix A. Contextualizing Tualatin's Housing Needs** presents the data and analysis necessary to understand Tualatin's housing needs in more detail.

2. The Need for Housing in Tualatin

Introduction

The Tualatin Housing Needs Analysis (HNA) describes the housing needs of current and future residents of Tualatin based on demographic and socioeconomic characteristics, such as age and income. It does not provide detailed data about housing needs for other demographic characteristics, such as race, ethnicity, people with one or more disabilities, or people experiencing homelessness.⁹

This chapter provides additional information about the housing needs by income, age, race, ethnicity, disability and for people experiencing homelessness. It uses standard sources of information from the U.S. Census. It adds information from other sources, such as Oregon’s Housing and Community Services Department, the United States Department of Housing and Urban Development, RLIS, Redfin, Costar, the City of Tualatin, and the Washington County Consortia 2020-2024 Consolidated Plan.

This chapter presents a description of the housing needs that the Housing Production Strategy is intended to address, as well as existing policies to address Tualatin’s housing needs. It ends with a summary of the existing and expected barriers to development of needed housing.

Summary of Tualatin’s Housing Needs

Appendix A provides detailed information about housing needs in Tualatin. Appendix A includes discussion of housing need related to demographics and socioeconomic characteristics of people in Tualatin, housing market conditions and trends, housing affordability, and information about outreach and engagement by City staff. This section summarizes these housing needs briefly. For more details about housing needs and the sources of information for this analysis, please refer to Appendix A.

- **Increased housing diversity.** Nearly two-thirds of Tualatin’s housing stock is single-family detached housing. Tualatin is a relatively young and ethnically diverse city. While Tualatin comprises many families with and without children, the senior population across the region is growing. Tualatin serves as an important employment hub in the Portland Metro area, drawing workers from across the region. The City’s demographic and socioeconomic characteristics suggest a need for a wide variety of housing types to meet the needs of a growing and diverse pool of existing and future residents. Feedback from stakeholders (in Appendix A) indicated that they think Tualatin needs to allow a wider range of housing types, such as more town homes,

⁹ Inclusion of detailed information about housing needs for other demographic characteristics—such as race, ethnicity, people with disabilities, or people experiencing homelessness—was not a requirement of the HNA when the Tualatin HNA was completed. This information is required by the HPS, so it has been included in this report.

mixed-use development, duplexes, triplexes, cottage clusters, multigenerational housing, accessory dwelling units, and high-rise apartments (structures that are six to eight stories in height).

- **Greater housing affordability and availability for homeowners.** Tualatin's homeownership stayed static from 2000 to 2017 at about 55%, however, it was lower than Washington County's (61%) and the Portland Region's (60%) homeownership rates. These statistics highlight a potential need for greater homeownership opportunities as homeownership continues to be one of the most effective (and primary ways) for households and individuals to build wealth. In addition, renter households are more likely to be at risk of displacement than homeowners, particularly in Oregon.¹⁰ Plans to increase homeownership can help to prevent displacement due to rising rental costs. Median sales prices in Tualatin continue to increase (more than doubling in Tualatin between 2012 and 2020) consistent with the region, putting homeownership out of reach for many households in the city.
- **Greater housing affordability and availability for renters.** Based on a survey of currently available rental properties in Tualatin, the typical asking rent ranged from about \$1,125 for a one-bedroom unit to more than \$2,000 per month for a three-bedroom unit. These costs are affordable to households earning 55% to 98% of the region's MFI (about \$45,000 to \$80,000).

Competition for lower-priced affordable units is strong, and many cannot afford these rents or housing sales prices without cost burdening themselves. In the 2013-2017 period, about 56% of Tualatin's renters were cost burdened, with 26% severely cost burdened.¹¹ Renters, especially those with lower incomes, are at risk of being displaced through increases in rental costs. Anecdotal discussions with stakeholders in Tualatin suggest that rising rents are causing people to move out of the city to find more affordable housing.

- **Increased income-restricted regulated, emergency, and supportive housing.** Tualatin has about 604 rent-restricted affordable housing units (accounting for about 5% of Tualatin's housing stock) but has about 1,753 households experiencing severe housing cost burden in the city. Washington County has about 530 people experiencing homelessness, about 300 of whom are unsheltered. Tualatin's Continuum of Care region has 111 emergency shelter beds, 10 safe haven beds, 119 transitional shelter beds, and 725 permanently supportive housing beds supporting persons experiencing homelessness in the region. However, in 2019, 44% of people experiencing homelessness

¹⁰ In Oregon, homeowners are largely insulated from the financial effects of market changes due to the property taxation system, which decouples market sales prices from assessed values, meaning that rising home values only impact property tax amounts in very limited circumstances. However, even after recent changes to state law providing greater protection for renters, renters are still much more vulnerable to changing market conditions and are subject to the decisions of the property owner regarding redevelopment, remodels, rent increases, etc.

¹¹ A household is said to be cost burdened if they spend 30% or more of their gross income on housing costs. A household is said to be severely cost burdened if they spend 50% or more of their gross income on housing costs.

in the region were unsheltered and about 211 students in the Tualatin/Tigard School District experienced homelessness in some form in the 2018-19 school year (many of them doubled-up¹²).

- **Need for housing for people to live and work in Tualatin.** Tualatin’s Economic Opportunities Analysis report (December 2019) reported that 93% of people working in Tualatin lived in another community (such as Portland, Tigard, Beaverton, or Hillsboro) and commuted into Tualatin each day. Some people who work in Tualatin can afford rent or homeownership in Tualatin, but some would be cost burdened in Tualatin.
 - *Lower wage.* A household with 1.8 employees in lower-paying sectors, such as retail (with an average pay of \$28,300), would have an income of about 55% of the region’s MFI. This household would be unlikely to afford homeownership. They may be able to afford monthly rent of about \$1,250, such as a one-bedroom unit in Tualatin. They would not be able to afford a larger unit with two or more bedrooms. This household would likely either live in an overcrowded unit (because a one-bedroom unit is too small for a family of four) or be cost burdened so that they could have a dwelling unit big enough for their household.
 - *Average wage.* The average wage at a job in Tualatin was about \$57,300 in 2017. Assuming about 1.8 jobs per household,¹³ the average wage for a household with jobs in Tualatin would be approximately \$103,000. This income would put the household at about 119% of the region’s MFI. A household with this income could afford a house between \$360,000 and \$412,000. While this is below the median sales price of \$491,000, a household with this income may be able to afford a lower-cost home in Tualatin.
 - *Higher wage.* A household with 1.8 employees in higher-paying sectors, such as manufacturing and health care (which has an average pay of \$73,400), would have an income of about 144% of the region’s MFI. This household could afford to rent or own and could afford the median sales price of \$491,000 in Tualatin.

Throughout this analysis, we discuss housing needs for specific populations, such as people of color. The reason for this discussion is that the housing needs of these populations are different from other groups in Tualatin. The Washington County Consolidated Plan describes the issue in the following way:

“Analyses persistently demonstrate that some population groups, including communities of color and people with disabilities, experience disproportionately high housing cost burdens, are less likely to be homeowners, are disproportionately represented in the criminal justice system, have a school

¹² “Doubled-up” refers to the sharing of other persons’ housing due to loss of housing or economic hardship.

¹³ This assumption is based on information about jobs per household for the Portland Region, including Clackamas County, Washington County, and Multnomah County. We use this estimate because commuting trends make it difficult to estimate jobs per household in Tualatin, given that so many workers commute into Tualatin for work.

achievement gap and experience other disparities relative to health, wellbeing, wealth, income and life outcomes. In deciding on priorities, the County sought opportunities to address persistent historic imbalances, consider systemic causes and advance a more equitable and fair housing system.”¹⁴

This analysis finds disproportionate housing needs for seniors, people of color, people with one or more disabilities, and people experiencing homelessness. Washington County’s Consolidated Plan identifies all of these groups as a priority with special housing needs.

- **Seniors.** People 65 years of age and older are disproportionately cost burdened compared to the average household—many living on fixed incomes in a region with increasing housing costs.¹⁵ About 62% of people aged 65 years of age and older are rent burdened in the Portland Region, compared to an overall average of 46% of renter households cost burden in the Portland Region.¹⁶ Over the next twenty years, people over 65 years are expected to be the fastest-growing age group. As this group grows, Tualatin will need more housing that is affordable, physically accessible, and in proximity to needed services (such as nearby health care or in-home assistance). Seniors will also need improved access to housing without discrimination, especially seniors of color.
- **People of color.** About 25% of Tualatin’s population identified as a person of color. In the Portland Region, about 55% of renter households that identified as Latino and 52% of renter households that identified as a non-Asian person of color were cost burdened.¹⁷ Latinos are the largest ethnic group in Tualatin (16% of the population) and have the lowest median income (\$30,761) of any race or ethnicity in Tualatin.¹⁸ Broadly, the housing needs for many people of color in Tualatin include improved access to affordable housing units, assistance to avoid displacement, access to housing in locations with “high opportunity” (such as areas near jobs, transit, or services), and access to housing without discrimination.
- **People with disabilities.** Across the Portland Region, people with one or more disabilities experience disproportionate cost burden. In particular, 53% of renters in the

¹⁴ 2020-2024 Consolidated Plan for Washington County and the Cities of Beaverton and Hillsboro, Executive Summary, page 3.

¹⁵ Some seniors have accumulated wealth, which is not accounted for in this analysis. Information about accumulated wealth is available at the national level but not at the state or city level.

¹⁶ Rent burden by these groups is less available and accurate for Tualatin, given the small size of the city and the quality of available data. As a result, this section presents rent burden for these groups in the Portland Region based on analysis from the report *Implementing a Regional Housing Needs Analysis Methodology in Oregon: Approach, Results, and Initial Recommendations* by ECONorthwest, March 2021.

¹⁷ This information is not available on a city-by-city basis from the US Census ACS. This statistic is pulled from a statewide analysis from the report *Implementing a Regional Housing Needs Analysis Methodology in Oregon: Approach, Results, and Initial Recommendations* by ECONorthwest, August 2020.

¹⁸ Tualatin’s largest community of color is Latino, with about 4,475 Latino people living in Tualatin. Other people of color living in Tualatin are Asian (1,013 people), two or more races (795 people), Black or African American (364 people), Native Hawaiian or Pacific Islander (127 people), American Indian or Alaska Native (103 people), and some other race (54 people).

Portland Region with a hearing or vision disability and 65% of renters with a disability other than a hearing or vision-based disability are cost burdened, compared to the average rate of cost burden for all households in the region at 46%. Housing needs of people with one or more disabilities vary by type of disability, but in general housing needs include improved access to an affordable unit, improved physical access to housing units, access to housing with needed services, and access to housing without discrimination—especially for people with one or more disabilities who are also seniors and/or people of color. Feedback from stakeholders (documented in Appendix A) indicates that people with disabilities have a difficult time finding accessible housing, such as housing that is physically accessible.

- **People experiencing homelessness.** People experiencing homelessness are disproportionately affected by the lack of affordable housing. There were 307 people who identified as homeless and unsheltered in Washington County and 44 people in the Tigard/Tualatin area in 2020.¹⁹ In addition, 16% of households in Tualatin are at risk of homelessness because they have income at or below 30% of MFI. More than 90% of these households are cost burdened and likely many are severely cost burdened. Housing needs for people experiencing homelessness vary by reason for homelessness. In Washington County, the primary reason people cited for experiencing homelessness was inability to afford housing. The broad housing needs for this group includes needs for immediate assistance (including rent support), permanent supportive housing (including supportive housing with services), and improved access to an affordable unit. The housing needs of people experiencing homelessness who are also a senior, disabled, or a Person of Color include the housing needs of those groups as well. The housing needs for people at-risk of becoming homeless may be the same as for people experiencing homelessness.

Stakeholder Engagement

The HPS uses stakeholder involvement that was conducted over the last two years: interviews with stakeholders as a part of the Tualatin 2040 engagement process, Tualatin HNA, and public events about severely rent-burdened communities.²⁰ The key issues identified through stakeholder engagement included the need for an increased variety of housing options (especially multifamily housing), the need for more affordable housing for both renter and owner-occupied housing, the need for housing for people who work at jobs in Tualatin, changes to the Development Code to support development of these housing types, the need for

¹⁹ This is based on the annual Point-in-Time (PIT) data. The PIT count is a snapshot of individuals experiencing homelessness on a single night in a community. Though the PIT count is not a comprehensive survey, it serves as a measure of homelessness at a given point of time and is used for policy and funding decisions.

²⁰ Annual meetings about severely rent-burdened communities are required in Oregon by HB 4006 or Oregon Laws 2018 Chapter 47. A "severely rent-burdened city" is a city where at least 25 percent of the renter households in the city are severely rent burdened. Tualatin has been designated by the State as a severely rent-burdened city since 2019.

redevelopment and creation of complete neighborhoods, and housing need for specific groups like people with disabilities and people of color.

Appendix A presents a full summary of the stakeholder input from these events. These issues have been incorporated into the goals and strategic actions presented in Chapter 3.

Housing Needs Addressed by the Housing Production Strategy

The housing market produces some types of housing without need for public intervention, such as development of single-family detached housing. The HPS focuses on housing that may require public intervention to ensure production. This section describes the housing needs that are the focus of the HPS: development of income-restricted affordable housing, housing for moderate-income households, and housing to meet the special needs of specific groups. This section describes Tualatin’s housing needs based on analyses from the *Tualatin Housing Needs Analysis* report (December 2019)²¹ and Appendix A, which includes an analysis of unmet housing needs for underserved groups. The analysis shows income and housing affordability based on the 2020 MFI for Washington County (\$92,000).

The housing needs in Exhibit 3 are the basis for the goals and strategic actions presented in Chapter 3.

Exhibit 3. Tualatin’s Housing Needs that Are Addressed in the HPS

Description of Need	Tualatin’s Housing Need
New housing to accommodate population growth	The HNA projects growth of 1,014 new dwelling units in Tualatin between 2020 and 2040.
Housing Need by Income	
Existing households ²²	Extremely Low Income (< 30% MFI): 1,700 households (16% of households) Very Low Income (30-50% MFI): 1,588 households (15% of households) Low Income (50-80% MFI): 1,614 households (15% of households) Moderate Income (80-120% MFI): 1,679 households (15% of households)
New households ²³	Extremely Low Income: 159 households (16% of new households) Very Low Income: 148 households (15% of new households) Low Income: 151 households (15% of new households)

²¹ <https://www.tualatinoregon.gov/sites/default/files/fileattachments/planning/page/22631/hna.pdf>

²² The HPS does not anticipate building new units for all existing households in Tualatin that have problems affording housing costs. But the HPS does propose actions to stabilize the housing costs of existing lower-income households and may result in development of housing that is more affordable to these households, enabling them to stay in Tualatin. Information about lower-income households and cost burden for existing households illustrates the existing housing need in Tualatin.

²³ This assumes that future residents of Tualatin have an income distribution that is the same as existing residents. Given the fact that incomes have grown at a relatively slow pace over the last two decades in comparison to housing costs (especially home sales prices), this seems like a conservative assumption about the future affordability of housing.

<p>Housing Needs for Extremely Low (< 30% MFI) and Very Low–Income (30-50% MFI) Households</p>	<p>Moderate Income: 157 households (15% of new households)</p> <p>At a minimum, Tualatin has housing need for:</p> <ul style="list-style-type: none"> ▪ 307 households earning less than 50% of MFI <ul style="list-style-type: none"> ▪ Tualatin also has 3,288 existing households earning less than 50% of MFI. ▪ These households can afford rents (including basic utility costs) of not more than \$1,150 per month. <ul style="list-style-type: none"> ▪ A household would need to earn \$58,000 to afford average multifamily rent of \$1,450 for a 2-bedroom unit (about 63% of MFI for a family of four). ▪ Meeting the housing needs of these households will require a combination of preserving existing income-restricted affordable housing and developing new income-restricted affordable housing. Development of income-restricted affordable housing typically requires extensive subsidy, with funding from the State, region, or County, in addition to any support from the City and other partners.
<p>Housing Needs for Low-Income (50-80% MFI) Households</p>	<p>At a minimum, Tualatin has housing need for:</p> <ul style="list-style-type: none"> ▪ 151 households earning between 50% and 80% of MFI <ul style="list-style-type: none"> ▪ Tualatin also has 1,614 existing households earning between 50% and 80% of MFI. ▪ These households can afford rents (including basic utility costs) of between \$1,150 and \$1,850 per month. <ul style="list-style-type: none"> ▪ A household would need to earn \$58,000 to afford average multifamily rent of \$1,450 for a 2-bedroom unit (about 63% of MFI for a family of four). ▪ Households with this income range are likely to live in rental housing predominantly and can likely afford a range of costs from below-average rent to average or above-average rent in Tualatin. ▪ Meeting the housing needs of these households will require a combination of preserving existing “naturally occurring affordable housing” and developing new income-restricted affordable housing in this price range. Development of new housing affordable in this price range generally requires some subsidy or public support, such as tax exemptions, government funding (typically from the State, region, or County, with some level of local contribution being critical), reduced systems development charges, low interest loans, philanthropic contributions, or other financial support. Funding for rental housing for households at 61% MFI and above is very scarce. Homeownership opportunities for this income range will likely be related to housing developed by nonprofit organizations, possibly

	with some form of subsidy, such as land donation, discounted land leasing, and land banking.
<p>Housing Needs for Moderate-Income (80-120% MFI) Households</p>	<p>At a minimum, Tualatin has housing need for:</p> <ul style="list-style-type: none"> ▪ 157 households earning between 80% and 120% of MFI <ul style="list-style-type: none"> ▪ Tualatin also has 1,679 existing households earning between 80% and 120% of MFI ▪ These households can afford rents (including basic utility costs) of between \$1,850 and \$2,750 per month. <ul style="list-style-type: none"> ▪ These households can afford rents higher than the average multifamily rent (\$1,450) for a two-bedroom unit, and many of these households can afford the typical multifamily rent for a three-bedroom unit (\$2,000 to \$2,400). ▪ These households cannot afford the median sales prices of \$491,000 in Tualatin but can likely afford lower-cost housing in the Tualatin housing market. ▪ Some households with income in the higher part of this range are likely to live in rental housing and some are likely to be homeowners. Households with incomes in the lower part of this income range may need assistance in attaining homeownership. ▪ Meeting the housing needs of these households will be a combination of development of rental housing (without subsidy from local or state government) and lower-cost housing for homeownership. Some homeownership opportunities for this income range will likely be related to housing developed by nonprofit organizations, possible with some subsidy, such as land donation, discounted land leasing, land banking, or a community land trust. Development of smaller and more affordable housing units, such as cottage housing, may provide opportunities for homeownership (without subsidy) for households in this group with higher incomes.
<p>Housing Need of Specific Populations</p>	
<p>Housing Needs of People of Color</p>	<p>Blacks, Latinos, American Indian or Alaska Natives, and Native Hawaiian or Pacific Islanders are more likely to rent their homes and live in multifamily housing than the overall average in Tualatin. People of color are more frequently cost burdened than the average in the Portland Region.</p> <p>About 19% of Tualatin’s population identified as Black, Latino, American Indian or Alaska Native, or Native Hawaiian or Pacific Islander. Meeting the housing needs of these households will require addressing the affordability issues, discussed above, as well as ensuring that people of color have access to housing without discrimination. This will require increasing awareness of Fair Housing rules for property owners and managers, tenants, City decision</p>

	<p>makers, and City staff. It will also require careful decision-making to change policies that have created barriers to housing access for people of color.</p>
<p>Housing Need of People with Disabilities</p>	<p>Disabilities include those that are visible, such as ambulatory or vision disabilities, and those that are not readily apparent, such as self-care, independent-living, or cognitive disabilities. Other conditions may require special accommodations, such as disabling diseases or mental health conditions.</p> <p>The Census reports that about 10% of Tualatin’s population has disabilities, such as ambulatory, vision, hearing, cognitive, self-care, or independent-living disabilities. Meeting the housing needs of these households will require addressing the affordability issues, discussed above, as well as ensuring that people with disabilities have access to housing that addresses their disability and that they have access to housing without discrimination. This will require increasing awareness of Fair Housing rules for property owners and managers, tenants, City decision makers, and City staff. It will also require approaches that encourage development of housing with specialized design standards to accommodate special needs.</p>
<p>Housing Need of People Experiencing Homelessness</p>	<p>The number of people experiencing homelessness in Tualatin is not clearly known. In part, this number is not known because people experiencing homelessness may move between neighboring cities, such as between Tigard and Tualatin.</p> <p>There were approximately 307 people experiencing homelessness in Washington County in 2020, 44 of whom were unsheltered in the Tigard and Tualatin area. Meeting the housing needs of people experiencing homelessness can range from emergency assistance (including rent and utility assistance), rapid rehousing, inclusion of local shelter, permanent supportive housing (including supportive housing with services), and improved access to an affordable housing unit (as discussed above).</p>

Existing Policies to Address Tualatin’s Housing Needs

This section lists existing measures that Tualatin has implemented to support housing development and presents preliminary draft measures (or policies or strategies) that may be included in the HPS.

This City of Tualatin has the following housing measures (goals, policies, or strategies) currently in place to address Tualatin’s housing needs. These measures include:

- Prohibiting single-family detached housing in most high-density zones in Tualatin.
- Allowing one or more accessory dwelling units (ADUs) in residential zones per lot.²⁴
- Applying density standards uniformly across zones that allow dwelling units on fee simple lots and on multifamily sites.
- Ensuring decisions about the types and locations of housing are data-driven and focused on equitable outcomes instead of the best outcomes for those with the most money and/or privilege.
- Removing open space/common amenity requirements for low-density residential.
- Providing information to small, local developers to help them understand land use permitting processes and give them a sense of clarity and certainty about the requirements, so they can better provide smaller-scale housing. Tualatin’s existing measures generally focus on land use efficiency, such as allowing development of denser housing types, or measures to reduce development costs, such as removing open space requirements for some housing development. By and large, the types of policies that Tualatin has yet to adopt are policies to support:
 - Development of affordable rental housing and preservation of affordable housing stock to prevent displacement of existing residents.
 - Prevention and reduction of homelessness.
 - Expansion of workforce owner and rental housing to increase the jobs housing balance.
 - Expansion of housing for people with special needs and seniors, and the development of housing to meet the cultural needs of diverse populations.
 - Greater availability of diverse housing types through regulatory or zoning changes, including mixed-use housing and redevelopment in commercial areas.
 - Planning for and developing transportation and public infrastructure to support affordable housing, workforce housing, and mixed-use housing development.

²⁴ Although, Tualatin’s ADU provisions are not yet compliant in regard to HB 2001 off-street parking requirements.

Existing and Expected Barriers to Development of Needed Housing

Barriers to development of needed housing in Tualatin include:

- **Land for housing.** Tualatin has a limited amount of unconstrained, vacant buildable residential land (244 acres) within the city (including in the Basalt Creek Planning Area). About 62% of this buildable land is within the Basalt Creek Planning Area, which is in the process of annexation. The City expects infrastructure development sufficient to support residential development over time. The concentration of buildable land in Basalt Creek may slow new residential development in Tualatin until this area is ready for development.

More than 90% of Tualatin's unconstrained, vacant buildable land is Low Density or Medium Low Density Residential, providing limited opportunities for development of multifamily housing. Tualatin has 1 acre of unconstrained vacant buildable land that is Medium High Density, 17 acres of High Density, and no unconstrained High Density High Rise Residential land. These are the areas where multifamily housing with five or more units per structure can be built. Scarcity of vacant land, especially for multifamily development, is one of Tualatin's primary barriers to development of needed housing.

- **Complexity and expense of redevelopment.** While Tualatin is able to identify areas that may be ripe for redevelopment (including areas for 4 to 6-story multifamily housing), the costs and complexity of redevelopment are substantial. Barriers to redevelopment include higher site acquisition and preparation costs (sometimes including negotiating with multiple landowners), higher construction costs for 4 to 6-story development (compared to 2 to 3-story development), and costs of upgrades to infrastructure (such as roads, water, stormwater, or sewer) to support increased development density. In a suburban environment, rents may not be high enough to justify these higher development costs. In addition, a number of the sites that the City has identified as potential redevelopment opportunities are located in a floodplain, which precludes federal funding for affordable housing from being used on those sites, or have other site-specific constraints that create challenges for development.
- **Regulatory barriers to multifamily housing.** In addition to a lack of land for multifamily development, existing development regulations for multifamily housing do not support efficient development or redevelopment of the type of housing the zones are intended to allow. Standards that force lower densities reduce the viability of both unregulated affordable housing and income-restricted affordable housing, and they make it even more challenging to build on the few smaller sites that are zoned for multifamily housing.
- **Funding and resources to support development of affordable housing.** Developing income-restricted housing for households with incomes 60% and below of MFI nearly always requires state, local, and/or philanthropic subsidy so that it can cover the costs of

development and operations with restricted rents. Developing new housing affordable to households with incomes of 51% to 80% of MFI also typically requires government subsidy and/or funding from sources such as nonprofits. One of the key barriers to development of affordable housing is identifying sufficient funding to support its development. Options for funding affordable housing development include direct funding (i.e., monetary contributions for housing), contributions of land, and cost reductions (e.g., tax abatements or waiving fees).

- **Capacity of the income-restricted development community to support development of affordable housing.** Capacity for development of affordable housing includes developers willing and able to develop income-restricted housing, such as nonprofits with the capacity to support development of affordable housing. There may be some capacity constraints for development of income-restricted affordable housing based on nonprofit developer capacity. However, availability of funding to support development of affordable housing is more of an issue.
- **Staff capacity to implement the Housing Production Strategy.** Implementing the strategic actions in the HPS will take a considerable amount of City staff capacity. If staff do not have sufficient capacity to work on the items in the HPS, that may slow or halt implementation of the HPS. Insufficient staff time to implement the HPS could be a barrier to development of needed housing. The amount of staff time needed to implement the HPS will only become clear as the City begins the evaluation of each strategic action to determine how much additional research and public engagement will be needed.
- **Need for ongoing engagement to understand housing needs.** Ongoing community engagement, especially with underserved communities or people with specialized housing need, is necessary to ensure that the City understands the current housing needs of these groups. Engagement has been more difficult than usual during the COVID-19 pandemic, especially with underserved communities because they are disproportionately negatively impacted by the pandemic. This is a potential barrier to needed housing development if the City does not have staff capacity to maintain this engagement or is unable to establish relationships with the communities in question.

3. Strategies to Meet Future Housing Need

Developing the Housing Production Strategy

Development of the HPS required attention to a variety of factors, such as the City's housing policy objectives, funding sources to support housing development, and factors that affect both housing development and the range of impact of the strategic actions.

Housing Policy Objectives

The Tualatin 2040 project, which included the Tualatin Housing Needs Analysis, resulted in an update to Tualatin's Comprehensive Plan and set new housing goals, policies, and strategic actions. These goals and policies, as well as the housing needs documented in Exhibit 3, are part of the basis of the goals and strategic actions presented in this chapter. In addition, the HPS requirements place more emphasis on equitable housing, fair housing, and underserved communities. These requirements have also provided part of the basis for the goals and strategic actions in this chapter. The high-level housing goals in Tualatin's Comprehensive Plan are:

- **Goal 3.1 Housing Supply.** Ensure that a 20-year land supply is designated and has urban services planned to support the housing types and densities identified in the Housing Needs Analysis.
- **Goal 3.2 Housing for All.** Encourage development and preservation of housing that is affordable for all households in Tualatin.
- **Goal 3.3 Affordable Housing.** Encourage the establishment of funding sources to support development of affordable housing and related public infrastructure.
- **Goal 3.4 Redevelopment.** Encourage timely strategic planning and redevelopment in Tualatin to create new mixed-use residential and commercial planning districts.
- **Goal 3.5 Housing and Transportation.** Encourage development and redevelopment in Tualatin that supports all modes of transportation, including walking, biking, and mass transit.
- **Goal 3.6 Residential Growth.** Residential growth by annexation or expansion to the Urban Planning Area or Urban Growth Boundary will be coordinated with local, state, and regional governments, districts, and stakeholders.

Funding Sources and Incentives

Potential Funding Sources. One of the key challenges in implementing financial actions in the HPS is likely to be the availability of funding. Funding is needed for staff time to evaluate the feasibility of implementing the HPS, but it is also needed in the form of financial contribution, waiver, or forgone revenue to support development of units, preservation of housing, and redevelopment. Identifying realistic funding sources will be necessary to achieve the outcomes of the HPS, increasing access to housing in Tualatin, especially for low-income households and underserved communities. Strategic Action 5.a is intended as a way to develop a specific funding action plan for implanting the HPS.

Potential local sources of funding could include implementation of a Construction Excise Tax (CET) in Strategic Action 1.c, evaluating other local sources of funding in Strategic Action 1.e, evaluating how to support preservation of regulated affordable housing in Strategic Action 3.a, use of Urban Renewal to support housing development in Strategic Action 10.a, and evaluating the prioritizing of Capital Improvements Programming in Strategic Action 12.a.

Other funding sources may include Washington County's Housing Authority, Metro's grant programs, the State of Oregon's Housing and Community Services Department, other state agencies that fund infrastructure, other programs necessary to support housing development, and other private and nonprofit organizations.

Potential Incentives. Financial incentives are also a critical part of a successful strategy for equitable housing production. In the HPS, potential incentives include property tax exemption in Strategic Action 1.a, changes to Systems Development Charges in Strategic Action 1.b, development of incentives to preserve low-cost rentals for below-market-rate privately owned rental housing in Strategic Action 4.a, Multiple Unit Property Tax Exemption to slow rental cost increases in Strategic Action 4.b, evaluating ways to incentivize inclusion of workforce housing units within new multifamily rental development in Strategic Action 6.a, evaluating the development of specialized design standards and incentives to accommodate special needs in Strategic Action 9.a, and evaluating incentives to support mixed-use development like Vertical Housing Tax Abatement in strategic action 10.d.

Partnerships

Partnerships will also play an important role in supporting housing development. For example, Strategic Action 2.c is about partnering to develop affordable housing for homeownership, Strategic Action 6.b is about partnering with employers on employee-assisted housing, 6.c is about partnerships for land banking, and 7.a is about partnering on existing rental and utility assistance programs.

Considerations for Implementing the Housing Production Strategy

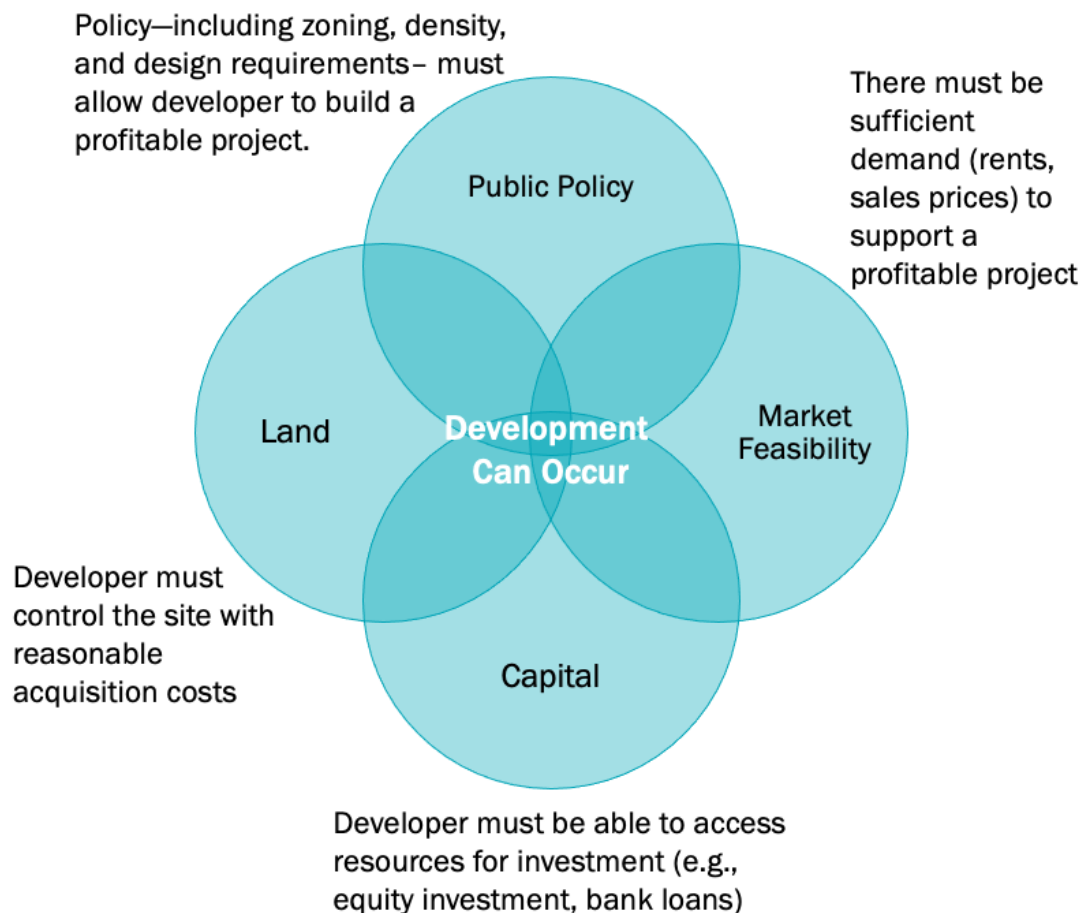
In evaluating the implementation of potential strategic actions, it will be important to consider supporting and leveraging the private market's ability to delivery market-rate development at a variety of price points, due to the limited public funding available to support income-restricted housing. In other words, increasing the overall supply of available housing units plays a significant role in overall housing affordability, including increasing opportunities for providing for those at the lower end of the income spectrum as well as historically underserved communities. The emphasis in the HPS is on production of housing that is affordable below 80% of MFI because that need is difficult or impossible to meet through market-rate housing development without public subsidy, such as many of the strategic actions proposed in the HPS. In addition, the HPS has an additional emphasis on the housing needs of underserved communities.

In an area with relatively low housing production per capita, the City has some influence over market-rate development through fees, charges, and development restrictions, despite the number of factors that the City does not control. The graphic in Exhibit 4 illustrates how four factors must intersect so that development can occur and where the City has most influence.

Tualatin does not control all of these factors entirely. Public policy at the local level is shaped through regional policy (by Metro) and the state. Land is generally controlled by the individual landowners, and development of infrastructure necessary to make land development can be prohibitively expensive. Market feasibility is largely affected by market forces, such as construction costs and achievable rents. Access to capital is largely controlled by investors and banks. However, Tualatin can directly influence public policy (through its Development Code) and availability of land (through zoning, density, planning for new land needed for housing, redevelopment, and infrastructure planning). Tualatin can also have a limited influence on market feasibility (through policies that reduce costs like tax abatements or waiving fees).

Exhibit 4. Four Necessary Factors that Allow Development of New Market-Rate Housing

Source: ECONorthwest

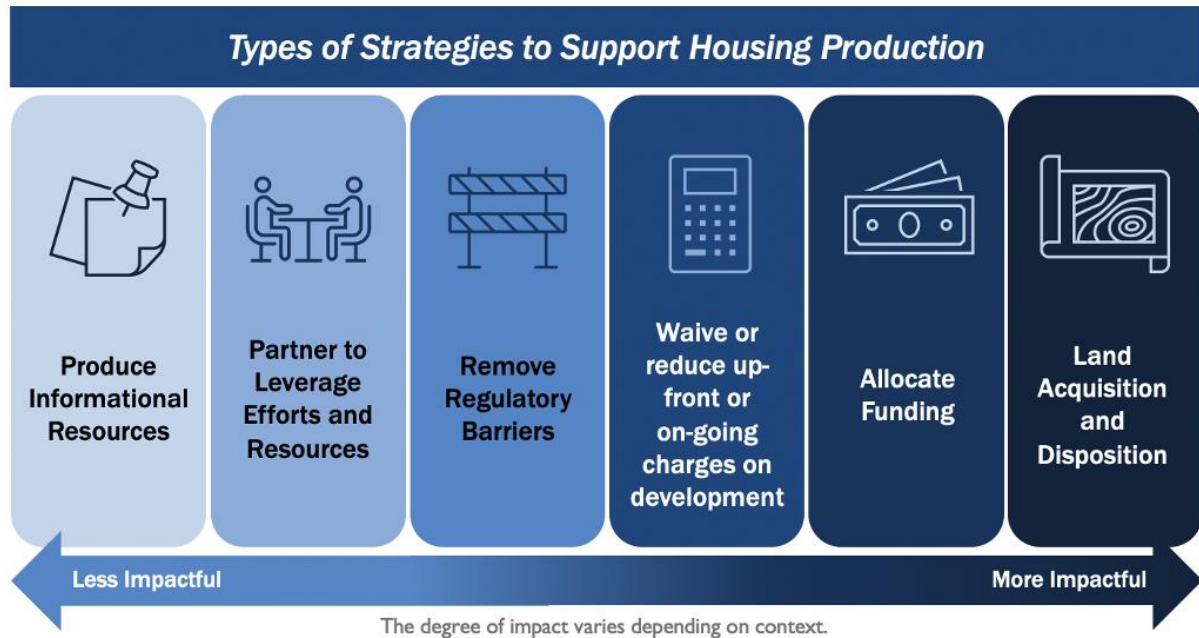


These factors all suggest that Tualatin should consider a wide range of strategic actions. Exhibit 5 shows the range of strategies, characterizing some strategies as more impactful and some as less impactful. More impactful strategies are those that provide funding or direct resources to support housing development (like land acquisition and disposition). These strategies are more impactful because funding and resources are the greatest constraint on development of income-restricted affordable housing (such as housing affordable to households with incomes below 80% of MFI).

While removing regulatory barriers and forming partnerships are shown as less impactful strategies, they are often necessary (but not sufficient on their own) to support housing development. For example, Tualatin’s HPS includes a strategic action (10.a) about redevelopment opportunities for creation of mixed-use development districts that supports development of affordable and workforce housing. This strategic action assumes that development densities will allow buildings that are four to six stories tall, with at least 80 dwelling units per acre. However, Tualatin’s Development Code does not allow for development of buildings that tall or at those densities. Strategic Action 11.a proposes to remove that regulatory barrier and allow taller and denser residential and mixed-use development.

This example also underscores the fact that many of the strategic actions presented in this chapter build on each other. While a partnership on its own may not be sufficient to support development of housing, it may be key when combined with other strategic actions.

Exhibit 5. Types of Strategies to Support Housing Production
Source: ECONorthwest



As part of development of the strategic actions in this report, ECONorthwest conducted interviews with the following developers, to assess potential use of key strategies: Alma Flores with REACH CDC, Community Development Partners, and Community Partners for Affordable Housing. In addition, ECONorthwest staff frequently discuss the types of strategies discussed in this document with developers in the Portland Region, as well as other developers across Oregon. What we learned from these interviews, as well as other work done for similar projects, is reflected in the goals and strategic actions in this report.

Goals and Strategic Actions

This section presents the goals and proposed strategies for inclusion in the HPS. The goals are intended to clearly describe the intended outcome(s) of the strategic actions, as they relate to Tualatin's Comprehensive Plan. For each strategic action, we include the following information, most of which is required by OAR 660-008-0050:

- A description of the strategic action
- The type of action
- A rationale for inclusion of the strategic action
- The anticipated impact of each strategic action, including:
 - Populations served by the strategic action
 - Income level addressed by the strategic action
 - Housing tenure, either owner or renter
 - Potential Impacts
 - Estimate of production of new units as a result of implementing the strategic action
 - Potential negative impact of the strategic action if it is successfully implemented
 - Magnitude of the action for producing new housing
 - A **low** magnitude is anticipated production of 1% or less of the needed new units (1,014 units) or about 10 dwelling units over the six-year period. A low magnitude does not mean a strategic action is unimportant. Some strategic actions are necessary but not sufficient to produce new housing.
 - A **moderate** magnitude is anticipated production of 1% to 5% of the needed new units (1,014 units) or about 10 to 50 dwelling units over the six-year period.
 - A **high** magnitude is anticipated production of 5% or more of the needed new units (1,014 units) or 50 or more dwelling units over the six-year period.
- Timeline for adoption and implementation of the strategic action, including:
 - A timeline for adoption of the strategic action, which is when the city would adopt the strategic action or otherwise officially decide to implement the strategic action.
 - A timeline for implementation of the strategic action, which is when the city would begin to use or allow use of the strategic action.
 - Time frame of the impact, which is the time period when the impact occurs.
- Implementation steps summarize the steps for implementing the strategic action at a high level.
- Lead agency and potential partners provide information about who will be responsible for implementing the strategic action.

-
- Funding or revenue implications provide high-level implications of the strategic action.

Implementation Schedule for Strategic Actions

Exhibit 6 presents a draft schedule for implementation of the Housing Production Strategy. The table shows each of the 12 goals with the strategic actions below. Each strategic action will go through a period of evaluation, then potentially adoption and implementation. The activities for each of these are described below.

- **Evaluation:** All strategic actions will require some level of evaluation prior to implementation, which may range from simple logistics (including information on a website) to complicated coordination between multiple internal and external stakeholders (adoption of a construction excise tax). The evaluation period will occur during the time in the tables shown in a teal color, before adoption.
- **Adoption:** This occurs when the City takes official action to adopt (or uses another official acknowledgement that the City is going to execute on the strategic action). The table shows the expected time of adoption in the time period represented by a teal color and “A” in the table.
- **Implementation:** This occurs when the City officially allows the strategic action to be used, represented by a brown color and “I” in the table.

Exhibit 6. Schedule for Evaluating, Adopting, and Implementing the Strategic Actions

Goal and Strategic Actions	On-Going 2021	2022	2023	2024	2025	2026	2027	Beyond 2027
1. Affordable Housing: Strongly prioritize, encourage, and support affordable rental housing development to increase affordable housing for households earning 0-60% Median Family Income.								
1.a Evaluate a Low-Income Housing Property Tax Exemption Program for Affordable Rental Housing			A	I				
1.b Evaluate Changes to Systems Development Charges						A	I	
1.c Evaluate Implementation of a Construction Excise Tax (CET)					A	I		
1.d Evaluate Support for Affordable and Workforce Rental Housing as part of Urban Renewal		A	I					
1.e Evaluate Financial Resources for Local Contributions to Affordable Housing Development						A	I	
1.f Evaluate Buildable or Redevelopable Public and Institutional Land Potentially Suitable for Affordable Housing				A	I			
1.g Evaluate Development Code Changes to Allow and Support Other Affordable Rental Housing Types in Tualatin					A, I			
1.h Evaluate Municipal Code, Development Code, Public Works Construction Code, and Building Code Processes to Make Building Affordable Housing Easier					A, I			
2. Affordable Homeownership: Encourage and support affordable homeownership to create opportunities for wealth creation.								
2.a Evaluate Impediments to Homeownership and their Removal					A	I		
2.b Partner to Encourage Education about Homeownership Opportunities		A	I					
2.c Partner with Organizations that Develop Affordable Ownership Housing				A	I			
2.d Evaluate Development Code to Encourage Diverse Housing Types for Affordable Homeownership					A, I			
3. Preservation of Regulated Affordable Housing: Preserve affordable housing to prevent the loss of existing affordable housing units and to prevent resident displacement.								

Goal and Strategic Actions	On-Going 2021	2022	2023	2024	2025	2026	2027	Beyond 2027
3.a Evaluate How to Support Preservation of Regulated Affordable Rental Housing					A	I		
3.b Evaluate Developing a Healthy Housing Initiative for Multifamily Housing				A	I			
4. Preservation of Naturally Occurring Affordable Housing (NOAH): Preserve naturally occurring affordable housing, where possible, to prevent loss of affordable units and to mitigate resident displacement.								
4.a Evaluate Development of Incentives to Preserve Low-Cost Rentals for Below-Market-Rate Privately Owned Rental Housing						A	I	
4.b Evaluate Using the Multi-Unit Property Tax Exemption to Slow Rental Cost Increases						A	I	
5. Housing for Underserved Communities: Implement housing policies, projects, programs, and partnerships to further support racial and social equity.								
5.a Consider Development of a Funding Action Plan to Implement the HPS with Attention to Equity			A	I		U ²⁵		
5.b Evaluate Impediments to Fair Housing to Create an Analysis of Impediments				A	I			
5.c Evaluated Ways to Best Ensure Opportunities for Education about Fair Housing Are Provided			I					
5.d Evaluated Strategies to Encourage Diverse Housing Types in High-Opportunity Neighborhoods					A, I			
6. Workforce Housing: Encourage, plan for, and support the development of workforce housing for households earning 61-80% Median Family Income, for both owner and renter, in order to increase the jobs-housing balance, reduce commute time and provide attainable housing for workers in Tualatin.								
6.a Evaluate Ways to Incentivize Inclusion of Workforce Housing Units within New Multifamily Rental Development						A	I	

²⁵ The Funding Action Plan will likely need to be updated by about 2026.

Goal and Strategic Actions	On-Going 2021	2022	2023	2024	2025	2026	2027	Beyond 2027
6.b Evaluate Potential Partnerships with Employers on Employer-Assisted Housing						I		
6.c Evaluate City Partnership to Participate in a Land Bank				A	I			
7. Housing Stabilization: Prevent and address homelessness to provide for safe living conditions for everyone living in Tualatin.								
7.a Evaluate Opportunities to Partner on a Local Rental and Utility Assistance Program	P ²⁶	I						
7.b Evaluate Ways to Develop Housing Options and Services to Address and Prevent Houselessness						A	I	
8. Housing Rehabilitation: Plan for and support housing programs and initiatives that are responsive to the safety and health needs of households earning 0-80% of Median Family Income.								
8.a Evaluate Establishing Local Housing Rehabilitation Program						A	I	
8.b Evaluate the Implementation of a Healthy Housing Initiative for Single-Family Housing					A	I		
9. Accessible Design and Other Specialized Design: Encourage and support Universal Design, Lifelong Housing Certification, and other similar standards.								
9.a Evaluate the Development of Specialized Design Standards and Incentives to Accommodate Special Needs					A	I		
10. Mixed-Use Housing and Redevelopment: Encourage and support development of mixed-use, mixed-income, and multifamily housing in commercial zones and urban renewal areas for households earning 0-80% of Median Family Income.								
10.a Evaluate Redevelopment Opportunities for the Creation of Mixed-Use Development Districts to Support Development of Affordable Housing and Workforce Housing			A	I				
10.b Evaluate Opportunities for Conversion of Commercial Buildings to Residential Uses			A	I				

²⁶ The City is piloting a test for this Strategic Action through December 2021, with potential extension of the partnership into 2022 and beyond.

Goal and Strategic Actions	On-Going 2021	2022	2023	2024	2025	2026	2027	Beyond 2027
10.c Evaluate Opportunities to Rezone Land for Mixed-Use		A	I					
10.d Evaluate Establishing Incentives to Support Mixed-Use Development, such as the Vertical Housing Tax Abatement			A	I				
11. Regulatory and Zoning Changes: Increase housing development opportunities through regulatory and zoning changes to accommodate a diverse range of housing types and price points to meet the housing needs in Tualatin.								
11.a Evaluate Updating Density Standards for Multifamily Housing in Medium-Density, High-Density, and Mixed-Use Zones	A	I						
11.b Evaluate Opportunities to Rezone Lower-Density Residential Land to Higher Density	A	I						
11.c Evaluate the Feasibility of Targeted Reductions to Off-Street Parking Requirements		A	I					
11.d Evaluate Updating Code to Allow Small Dwelling Unit Developments					A, I			
11.e Evaluate Adopting an Expedited Permitting Process for Affordable Rental Housing and Affordable Homeownership			A	I				
11.f Evaluate Providing Additional Engagement and Information to Developers of Affordable Housing	A	I						
12. Transportation and Public Infrastructure: Plan for and develop transportation and public infrastructure to support affordable housing, workforce housing, mixed-use housing, and mixed-income housing.								
12.a Evaluate Ways to Prioritize Capital Improvements Programming for Affordable and Workforce Housing				A	I			

Goals and Strategic Actions

This section presents Goals 1 to 12 and the strategic actions associated with each goal.

Goal 1. Affordable Housing: Strongly prioritize, encourage, and support affordable rental housing development to increase affordable housing for households earning 0-60% Median Family Income.

We recommend that the City pursue the following goal, which supports Goals 3.2 and 3.3 in the Comprehensive Plan:

- Strongly prioritize, encourage, support, and promote the development of affordable rental housing for households earning 0-60% Median Family Income.

Implementing this goal would require developing an affordable rental housing program to encourage and support affordable housing development for households earning 0-60% Median Family Income. The strategic actions to evaluate and potentially implement this goal are described below. The City may choose to adopt this goal or the results of the strategic actions into the Comprehensive Plan in the future.

1.a Evaluate a Low-Income Housing Property Tax Exemption Program for Affordable Rental Housing	
Description	Type of Action
<p>Evaluate a property tax exemption program for affordable rental housing.</p> <p>Two tax exemptions programs could be used to support affordable housing:</p> <ul style="list-style-type: none"> Low-Income Rental Housing Exemption: Would provide a 20-year, renewable property tax exemption for rental housing for low-income households (60% of area median income and below). Housing need not be owned or operated by a nonprofit entity; if it is not, only housing built after the program is adopted is eligible. The exemption could also apply to land held for future affordable housing development. Only the City's taxes would be exempted unless there is sufficient support from overlapping taxing districts. Requires that savings be passed on to tenants through rent reductions. Nonprofit Low-Income Rental Housing Exemption: Would provide a full property tax exemption for new and existing 	<p>Adopt a Tax Exemption to Reduce Ongoing Charges on Development</p>

affordable housing owned and operated by a nonprofit organization for as long as the property meets eligibility criteria. Tenants must initially qualify at 60% of area median income or below, but once qualified, existing tenant incomes may rise to as much as 80% of area median income over time. The exemption could also apply to land held by a nonprofit for future affordable housing development. Only the City's taxes would be exempted unless there is sufficient support from overlapping taxing districts.

The evaluation would include a conclusion as to which of the two available options under state statute is better suited to the needs of housing providers in Tualatin.

<p>Rationale</p>	<p>With very thin margins for rents in affordable housing developments to be able to cover operating costs (even with subsidies), eliminating the cost of property taxes is an important way to improve the viability of affordable housing. Affordable housing providers sometimes use alternative means to secure tax exemptions (e.g., partnership with the local Housing Authority), but the alternatives add complexity to an already complex process. A locally enabled tax exemption also demonstrates local support for affordable housing development, which can help with securing state and federal funds.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, and low-income renter households ▪ Income: 0-60% of Median Family Income ▪ Housing tenure: Rental ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units). If this incentive were used for one to two apartment buildings at 50 to 150 units each, this strategy could contribute to development of 50 to 300 affordable units. - Equitable Outcomes: This is an opportunity to provide equitable housing for low-income households by serving, for example, underserved communities, people with disabilities, and people with special needs, increasing diversity in neighborhoods. ▪ Potential Financial Impact: The City will forgo some property tax income for these properties for the duration of the exemption. This reduces some revenue for city services and some revenue for participating taxing districts. ▪ Magnitude: Moderate

Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: June 30, 2023 ▪ Implementation to commence: 2023 ▪ Time frame of impact: The property tax exemption can be used after adoption for as long as the City offers the tax exemption.
Implementation Steps	<ul style="list-style-type: none"> ▪ Evaluate viability of adoption, including an analysis of the pros and cons of the two tax exemptions. ▪ Seek input from overlapping taxing districts on their willingness to support the exemption. ▪ Discuss topic with City Council at work sessions and in public hearings. City Council may choose to adopt exemption by resolution or ordinance following a public hearing. ▪ Follow up with overlapping taxing districts to request that they pass resolutions to support the exemption. ▪ If supported, select one of the tax exemptions for adoption.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division and City of Tualatin Finance Department ▪ Partners: Overlapping Taxing Districts
Funding or Revenue Implications	Tax exemptions reduce general fund revenues for all overlapping taxing districts, including the City.

1.b Evaluate Changes to Systems Development Charges

Description	Type of Action
<p>Evaluate options for potential changes to System Development Charges (SDCs) and Transportation Development Tax (TDT) to support development of affordable housing.</p> <ul style="list-style-type: none"> ▪ SDCs are fees collected when new development and some redevelopment occurs within the City. Revenues are used to fund growth-related capital improvements. ▪ TDT is a voter-approved charge imposed on new development and redevelopment within Washington County (including its cities) to help pay for the impact development has on the transportation system. <p>The City of Tualatin has limited control over SDCs because most are collected on behalf of other service districts and providers, who determine the rates and rate structures. The parks and water SDCs are set by the City. The primary opportunity for changes to SDC is with the parks SDC, which recently went through a review and update process. The water SDC is based on meter size, which makes meaningful changes in SDCs challenging, especially for multiunit projects. Tualatin does not have control over the rate or rate structure for Washington County’s TDT, though the City does receive a share of the revenue.</p> <p>The City of Tualatin could evaluate changes to its parks and water SDCs by reducing, deferring, and/or financing SDCs at a low interest rate for regulated affordable housing or other needed housing types.</p>	<p>Evaluate Change to Fee Schedules to Reduce Charges on Development</p>
<p>Rationale</p>	<p>Changes to the City’s parks or water SDC rates or methodology could reduce up-front costs for developers of regulated affordable housing and/or encourage specific types of housing development (e.g., smaller units).</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, and low-income renter households ▪ Extremely low, very low, and low-income owner households ▪ Income: 0-80% of Median Family Income ▪ Housing tenure: Owner and Renter ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): Tualatin can have an impact on its parks and water SDCs and can backfill the costs to

	<p>County TDTs.</p> <ul style="list-style-type: none"> - While reducing parks or water SDCs could provide some support for affordable housing development, on its own this action is unlikely to directly result in development of new affordable housing, but it may serve to attract affordable housing developers to Tualatin with this cost reduction. - Equitable Outcomes: Providing incentives like SDC reductions supports the development of equitable housing. ▪ Potential Financial Impact: The City will likely need to make up revenue forgone through the changes to SDCs, such as by backfilling with TDTs. ▪ Magnitude: Low
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2026 ▪ Implementation to commence: 2027 ▪ Time frame of impact: Changes to SDCs will impact development of needed housing if changes are adopted and in use by 2027.
Implementation Steps	<ul style="list-style-type: none"> ▪ Evaluate options for deferral or financing of parks or water SDCs for affordable housing under the existing methodology, working with current planning and finance divisions. ▪ At the next update to the parks or water SDC methodology, evaluate options to offer full or partial exemptions for affordable housing and/or to adjust the residential rate structure to offer lower rates for smaller units.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency City of Tualatin Parks and Recreation Department, City of Tualatin Finance Department, and City of Tualatin Planning Division.
Funding or Revenue Implications	<p>Changes may reduce or delay SDC revenue to the City.</p>

1.c Evaluate Implementation of a Construction Excise Tax

Description	Type of Action
<p>Evaluate a Construction Excise Tax (CET), a tax assessed on new development and expansions as a percent of the permit value.</p> <p>State statute defines the allowed uses of CET funds and the allowed maximum tax rate. The City of Tualatin could levy a CET on commercial, industrial, and/or residential development. Tualatin has limited land for new residential development within City limits at present; however, revenues from a CET levied on commercial or industrial development could be used for housing programs. At least half of the revenue from a CET on commercial and industrial development would need to be used for local housing programs (capital or programmatic services), but the other half is unrestricted (capital or programmatic services); revenue from a CET on housing would need to go toward housing, with certain percentages toward various specific categories of expenditures.</p> <p>At least eight jurisdictions in Oregon have adopted a CET to fund affordable housing. Most are using or plan to use the revenues to offer grants and/or loans as flexible gap financing for affordable housing development. While it can be used to pay for services, capacity building, etc., the variable nature of the revenues makes it challenging to fund ongoing commitments.</p>	<p>Establish a CET to Allocate Funding</p>
<p>Rationale</p>	<p>CET is one of few options to generate locally controlled funding for affordable housing and could be implemented without a public vote. Industrial development has been strong in Tualatin in recent years. If this continues, a CET on commercial and industrial development could potentially generate enough revenue to allow the City to fund some of its other equitable housing and related strategies.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Depends on how revenue is used, but would be for extremely low, very low, and low-income and underserved communities. ▪ Income: Depends on how revenue is used, but most likely directed toward 0-60% of Median Family Income, however, could be used to meet other income groups, such as contribution to homeownership for households at 61-80% of Median Family Income. ▪ Housing tenure: Renter or owner

	<ul style="list-style-type: none"> ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): Based on analysis by ECONorthwest, a 0.5-1% CET on commercial and industrial development could generate roughly \$200,000-400,000 per year. While this would cover the full cost of only a few units of affordable housing per year, it could pay for SDCs and TDT on roughly 100 units per year. If used as gap financing, it could potentially contribute to funding one or two affordable housing developments per year. - Equitable Outcomes: Developing funding sources like CET can support equitable housing programs and development, such as affordable housing and workforce housing. ▪ Potential Financial Impact: Homebuyers and businesses that pay the CET will have slightly higher costs for their homes and for commercial or industrial development. The increase in home prices will not exceed 1% as a result of the CET and may be smaller if the City establishes a CET below 1%. ▪ Magnitude: Moderate
<p>Timeline</p>	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2025 ▪ Implementation to commence: 2026 ▪ Time frame of impact: If a CET is implemented in 2026, it may take several years for funds to accumulate to an amount that could be used to support development of housing.
<p>Implementation Steps</p>	<ul style="list-style-type: none"> ▪ Evaluate potential approach. Include projections on potential revenue and what programmatic goals could be accomplished with revenue. Include SWOT analysis for both residential and commercial/industrial. ▪ Engage with developers, major employers, and the business community in Tualatin to evaluate tolerance for a CET on commercial and industrial development and where there are shared interests in supporting local housing production. ▪ Seek direction on whether to proceed with adoption from City Council at work sessions. ▪ Tualatin City Council could impose the CET by adoption of an ordinance or resolution that conforms to the requirements of ORS 320.192–ORS 320.195. ▪ If directed, create a plan for the use of CET funds.
<p>Lead Agency and Potential Partners</p>	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division and City of Tualatin Finance Department ▪ Partners: Local developers, Chamber of Commerce, major

	employers, and the Tualatin business community
Funding or Revenue Implications	<p>Adopting a CET would provide funding for other strategies. ECONorthwest conducted a preliminary estimate of CET revenue via a backward-looking analysis using the City of Tualatin’s permit database for new residential and commercial/industrial construction from the last five years. The results of this analysis are summarized in Appendix B.</p> <p>Because a percentage (4%) of the revenue can be applied to the City’s costs for administering the program, there should be minimal additional cost for the City.</p>

1.d Evaluate Support for Affordable and Workforce Rental Housing as Part of Urban Renewal

Description	Type of Action
<p>Evaluate the potential to specifically identify affordable housing (for instance, housing affordable at 0-60% of MFI and workforce affordable housing at 61-80% of MFI) as a goal of existing or future Urban Renewal Plans. As applicable, identify specific affordable housing programs, projects, and/or supportive infrastructure to be included with urban renewal plan(s).</p> <p>TIF funding for affordable housing or other equitable housing would need to gain approval through the City’s Urban Renewal process and be consistent with the State Oregon Revised Statute (ORS) 457.</p> <p>TIF (for urban renewal districts) is used as a way to make strategic public investments that spur development in areas where it might not otherwise occur. When successful, the new development leads to an increase in property value and property tax revenue. The increment of new tax revenue from within the district (from the time the district is established) is captured and used to pay off bonds (or directly pay) for the public investments in the area. When the bonds are paid off, the entire valuation of the district is returned to the general property tax rolls. While regulated affordable housing is often tax exempt and does not generate additional tax revenue, some jurisdictions allocate a portion of TIF revenues to fund affordable housing to support equitable development within the TIF district. TIF can be invested in the form of low interest loans and/or grants for housing projects or a variety of capital investments.</p> <p>Additional Context: The City of Tualatin is in the process of evaluating two potential new TIF districts: (District 1) the Basalt Creek and Southwest Industrial Area and (District 2) the North Study Area, Bridgeport Village, Town Commons, I-5 Corridor and Tualatin-Sherwood Road. The City also recently modified plans for an existing district (Leveton). While much of the land included in these areas is planned for industrial and commercial use, portions of the potential new districts are planned for residential or mixed-use development. These could be appropriate locations for new affordable housing rehabilitation or mixed-income housing.</p> <p>District 1 potential total TIF revenue over 30 years is estimated to be between \$28.4 million and \$55.5 million, depending on future growth in assessed value in the area.</p>	<p>Evaluate Affordable Housing Support as Part of Urban Renewal</p>

District 2 potential total TIF revenue over 30 years is estimated to be between \$248.2 million and \$362.7 million, depending on future growth in assessed value in the area.

District 1 is slated to be established in fall of 2021 and District 2 in approximately two years. In determining the resources for affordable housing from TIF, the City would want to consider the specific housing needs of each district. TIF funding for District 1 may be focused more on infrastructure funding to pay for infrastructure needed to support new development. For District 2, the amount of TIF used for housing could be a larger share of TIF funding, as this district may be focused on housing redevelopment.

<p>Rationale</p>	<p>TIF is one of few available locally controlled sources of funding to build or improve housing. In addition, investing a share of TIF revenues into affordable or mixed-income housing within an area that is a focus for local investment helps support inclusive and equitable housing development in that area.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, low-income, and moderate-income households ▪ Income: 0-80% of Median Family Income ▪ Housing tenure: Renter or Owner ▪ Potential Benefits: <ul style="list-style-type: none"> - Housing Production (new units): Urban renewal TIF is the largest source of funding over time that could be made available for affordable housing development. The amount of housing production depends on the funds raised and allotted through urban renewal. TIF can only be spent on capital projects, not operations. - Equitable Outcomes: Establishing TIF funding for equitable housing may have the greatest impact over time of any single funding sources on equitable housing development in the city to be used to develop affordable housing, workforce housing, mixed-use housing, and mixed-income housing and related infrastructure. ▪ Potential Financial Impact: The financial impacts of a URA are borne by overlapping taxing districts, not by individual taxpayers. The financial capacity of two potential new districts on the horizon in Tualatin would not be available immediately but would build slowly over time. In pursuing this strategic action in Tualatin, it will be important to get an early start on setting goals and priorities for TIF funding for affordable housing and other

	<p>equitable housing before the URA districts are established.</p> <ul style="list-style-type: none"> ▪ Magnitude: Moderate to Large
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 32, 2022 ▪ Implementation to commence: 2022 ▪ Time frame of impact: It would likely be at least 5 to 10 years before there is sufficient revenue in the Urban Renewal District to have enough funds to make significant investment in housing.
Implementation Steps	<ul style="list-style-type: none"> ▪ As part of urban renewal planning for the two potential new districts, evaluate inclusion of affordable housing as a policy. Additionally, identify affordable housing programs, projects, and/or supportive infrastructure. ▪ Proceed with the planning and adoption processes already underway for the two potential new districts, including establishing priorities for the areas, identifying project lists, confirming financial feasibility, preparing required plan documents, and holding adoption hearings.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division and City of Tualatin Finance Department ▪ Partners: Tualatin Development Commission; Overlapping taxing districts
Funding or Revenue Implications	<p>TIF results in foregone tax revenue for the City and other overlapping taxing districts for several decades for a variety of types of development investment, though it can (and should) grow the tax base in the long term by supporting development that would not otherwise have occurred.</p>

1.e Evaluate Financial Resources for Local Contributions to Affordable Housing Development

Description	Type of Action
<p>Evaluate, develop, and promote financial resources for local contribution to affordable housing development. Funds from this effort could be contributed to a Housing Trust Fund Initiative.</p> <p>The City of Tualatin could consider funding sources including foundation grants, private gifts, or other sources to assist with funding contributions to support affordable housing development. The City may consider other sources of funding, such as money from the City’s General Fund, Local Option Levy, Cannabis Tax revenues, and other funding sources.</p> <p>Local contributions to affordable housing development are often critical in helping to fill the funding gap for these projects and to compete successfully for other government funding and foundation grants.</p>	<p>Collect Revenue to Allocate Funding to Housing Programs</p>
Rationale	<p>These funds can be used to support incentives and support for affordable housing development, such as tax exemptions.</p>
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, and low-income households ▪ Income: 0-60% of Median Family Income ▪ Housing tenure: Renter ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): The amount of housing production depends on the funds raised and contributed through these resources. - Equitable Outcomes: Local contributions to affordable housing development could help underserved communities and demonstrate the City’s commitment to equity. ▪ Potential Financial Impact: Funds spent on affordable housing will be unavailable for other city services, however, these funds may not have been able to be successfully raised otherwise. ▪ Magnitude: Moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2026 ▪ Implementation to commence: 2027 ▪ Time frame of impact: If this strategic action is implemented in

	<p>2026, it may take several years for funds to accumulate to an amount that could be used to support development of housing.</p>
<p>Implementation Steps</p>	<ul style="list-style-type: none"> ▪ Identify financial sources that the City could use to support affordable housing development. ▪ Develop a Housing Trust Fund as a place to collect funds. ▪ Continue to raise funds over time.
<p>Lead Agency and Potential Partners</p>	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division and Finance Department ▪ Partners: State/Federal Agencies, State and National Foundations
<p>Funding or Revenue Implications</p>	<p>Evaluating, developing, and promoting financial resources for local contribution is a comparatively low-cost strategy, primarily relying on the use of staff time.</p> <p>If the City uses General Fund revenue or revenue from other taxes, such as Cannabis Tax revenues, the money from these sources would not be available of use for other purposes in Tualatin.</p>

1.f

Evaluate Buildable or Redevelopable Public and Institutional Land Potentially Suitable for Affordable Housing

Description	Type of Action
<p>Periodically evaluate and maintain an inventory of potentially buildable or redevelopable surplus or excess land owned by public agencies and/or institutions to determine its suitability to support development of income-restricted, publicly subsidized, affordable housing.</p> <p>As the facilities needs of public agencies or institutions change over time, properties may not be needed for their originally intended purpose. Also, sometimes sites that are still serving their intended purpose are larger than needed, and the unused portion could be converted to other uses. When these opportunities come up, the City can capitalize on them to support development of affordable housing, but this requires forethought, an intentional approach, and aligning policies and procedures around surplus and excess land and facilities management. Other public agencies and institutions (including religious institutions) may also have land that they no longer need and are willing to make available for affordable housing. Some may be legally required to sell surplus and excess property at fair market value, but others may have flexibility for how they dispose of this land and may be willing to partner with the City to consider opportunities to use this land for affordable housing.</p>	<p>Adopt a Policy or Program to Support Land Acquisition and Disposition</p>
<p>Rationale</p>	<p>Four primary factors influence housing development: (1) ability to secure suitable land, including acquisition costs; (2) access to capital, including equity and bank loans; (3) public policy, such as zoning, density, and design requirements; and (4) market conditions, including depth of demand and rents/sales prices. This strategy allows the City of Tualatin to directly influence the ability to secure land for affordable housing, by offering particular properties only to affordable housing developers. It can also influence the cost of land, by buying down prices to support affordable housing.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Extremely and very low-income households ▪ Income: 0-60% of Median Family Income ▪ Housing tenure: Renter ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): The amount of housing production depends on the size and number of properties that

	<p>can be converted to affordable housing as a result of this strategy. If this strategy identified 0.5 to 3 acres of surplus or excess land over the eight-year planning horizon, at 30 to 60 units per acre, this strategy could produce between 15 and 180 units of affordable housing.</p> <ul style="list-style-type: none"> - Equitable Outcomes: Land acquisition and land donation for affordable housing development could result in project feasibility by buying down the cost of the overall project; this could contribute to much needed housing for low-income households. ▪ Potential Risk: If certain public land is used for affordable housing, it may not be able to be used for other city functions. However, if the land is deemed surplus or excess land, it may not be needed for other city functions. If the land is owned by an institution, such as a church, it may be able to be used, purchased, or donated for affordable housing. ▪ Magnitude: Moderate
<p>Timeline</p>	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2023 ▪ Implementation to commence: 2024 ▪ Time frame of impact: Land may be available to support affordable housing development immediately after adoption of this strategic action (or possibly before it is completed). It is also possible that no land will be available by adoption and that land will become available in the future through implementing this strategic action, especially with potential future conversations with land owned by institutions.
<p>Implementation Steps</p>	<ul style="list-style-type: none"> ▪ Inventory City-owned land within Tualatin that may be suitable for affordable housing development and determine what land is currently surplus or excess or may be deemed so in the next few years. ▪ Reach out to other public agencies and institutions, including faith-based organizations, that own land within Tualatin to determine if these entities are willing to include their lands in the inventory. ▪ Review policies and procedures related to surplus and excess lands to determine whether changes or refinements are needed to enable or encourage them to be made available for affordable housing and to establish protocols for how affordable housing developers would be selected when land is available.

Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: Public agencies and/or institutions, including faith-based organizations, in Tualatin; affordable housing developers; City of Tualatin Finance Department; other divisions at the City of Tualatin (as needed)
Funding or Revenue Implications	<p>Leveraging currently owned surplus and excess lands does not require direct funding, other than staff time to manage the process. Coordination with other partners primarily requires staff time; however, if the City were to acquire land from partners to control the disposition process, this would require funding.</p> <p>Disposing of surplus and excess land could relieve the City’s existing upkeep costs on those lands, but the City may forego revenue by selling the property at below-market value.</p> <p>Depending on whether the affordable housing development is tax exempt (e.g., Housing Authority) or subject to a City-controlled tax exemption, it is possible that after development, the City of Tualatin could experience an increase in their tax base.</p>

1.g Evaluate Development Code Changes to Allow and Support Other Affordable Rental Housing Types in Tualatin

Description	Type of Action
<p>Evaluate Development Code Changes to allow and support development of other affordable rental housing types in Tualatin that provide affordable housing, beyond the required housing types in House Bill 2001.</p> <p>Other housing options may include dwelling units designed for multiple unrelated individuals living in the same dwelling with shared kitchen and bathrooms such as “adult dorms”; small-scale homes (dwelling units between 100 and 500 square feet); and other innovative, small housing types (such as cargo containers). Allowing and clarifying standards for a diverse array of housing types would require development of clear and objective standards for these housing types.²⁷</p> <p>In addition, Tualatin’s Development Code does not currently allow small-scale dwellings, such as those at 100 to 500 square feet in size, at densities that would support development of this housing type as affordable housing.</p>	<p>Evaluate Change to Zoning Code</p>
<p>Rationale</p>	<p>Further diversifying Tualatin’ housing stock gives residents and prospective residents a wider range of housing options to meet their financial needs and housing preferences.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Extremely low and very low-income, low-income, and moderate-income households ▪ Income: 0-80% of Median Family Income ▪ Housing tenure: Renter ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This action would not directly result in production of new affordable housing units. However, it is a crucial step in the process necessary to open up more opportunities for production of potentially more affordable types of housing in Tualatin.

²⁷ Tualatin’s Development Code defines household living as “the residential occupancy of a dwelling unit by a family or household, where the dwelling unit is self-contained with cooking, sleeping, and bathroom facilities.” In addition, Tualatin’s Development Code defines a household as “one or more persons related by blood, marriage, domestic partnership, legal adoption or guardianship, plus not more than five additional persons, who live together in one dwelling unit.” These definitions limit options for living situations with separate living quarters but with shared kitchen and bathrooms (such as “adult dorms”), in situations that do not qualify as group living (as defined by Tualatin’s Development Code).

	<ul style="list-style-type: none"> - Equitable Outcomes: This is an opportunity to provide more options for lower-cost housing, which may help underserved communities, people with disabilities, and people with special needs, increasing diversity in neighborhoods. ▪ Potential Risk: Allowing smaller units may increase density in existing neighborhoods, with the potential to cause concern for some of the existing residents, while others may welcome it. ▪ Magnitude: Indirect, small
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2024 ▪ Implementation to commence: 2024 or early 2025 ▪ Time frame of impact: Impact is small. Impact may be greater if changing the Development Code would allow market-rate and regional affordable housing providers to utilize the new wider range of housing types in Tualatin.
Implementation Steps	<ul style="list-style-type: none"> ▪ Review Development Code to identify and clarify innovative and diverse housing types in the Development Code. Consider housing definitions, types of units permitted, lot dimensions, height standards, and other related standards. ▪ Revise Development Code as needed.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: Development community
Funding or Revenue Implications	<p>Evaluating zoning code changes for allowed uses is a comparatively low-cost strategy, primarily relying on the use of staff time.</p>

1.h Evaluate Municipal Code, Development Code, Public Works Construction Code, and Building Code Processes to Make Building Affordable Housing Easier

Description	Type of Action
<p>Evaluate the City’s Municipal, Development, Public Works Construction, and Building Codes processes to identify opportunities to make it easier to develop and build affordable housing. This could include updating the modifications or variance process and requirements, including making allowing modification or variance processes for affordable housing to have a simpler review process than typical, such as not requiring hearings. It could also include prioritizing review of regulated affordable housing development proposals to the maximum extent possible, while also meeting state-required timelines for review of other development proposals.</p> <p>The City has varying administrative roles in land use and building permitting processes. The City could look for opportunities to reduce or expedite these processes, resulting in improved customer service and reduced development timelines. This strategy could include updating the modifications/variance processes and requirements, which would result in making modification/variance processes for affordable housing simpler and quicker (e.g., not requiring hearings).</p>	<p>Evaluate Change to Zoning Code and Other Development Processes</p>

Rationale	Enable easier development of regulated affordable housing in Tualatin. Enable quicker development time frames by demonstrating responsiveness to affordable housing developer needs.
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Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Extremely and very low-income households ▪ Income: 0-60% of Median Family Income ▪ Housing tenure: Renter ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): In and of itself, this strategic action is not likely to result in development of more housing. It may make affordable housing more feasible to develop by decreasing the permitting time and may be helpful by attracting affordable housing developers to develop in Tualatin. - Equitable Outcomes: This is an opportunity to provide more options for lower-cost housing, which may help underserved communities, people with disabilities, and people with special needs, increasing diversity in neighborhoods.
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	<ul style="list-style-type: none"> ▪ Potential Risk: This strategic action may result in faster review of affordable housing development, possibly decreasing opportunities for public input. Expediting permitting processes for affordable housing may result in minor increases in the time needed for the permitting processes of other development. ▪ Magnitude: Low
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2024 ▪ Implementation to commence: 2024 or early 2025 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented in the Municipal Code.
Implementation Steps	<ul style="list-style-type: none"> ▪ Work with City Council to develop goals for the length of time the permitting process may take. ▪ Identify inefficiencies in the permitting process and make the necessary changes to streamline procedures. ▪ Develop a system to measure and monitor the time it takes for affordable housing proposals to get through the City’s development processes. ▪ Survey applicants periodically to assess services and areas for improvement.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: City of Tualatin Engineering and Building Divisions and Legal Services Department
Funding or Revenue Implications	<p>Evaluating Development Code and process changes is a comparatively low-cost strategy, primarily relying on the use of staff time. If additional staff time were needed to support faster review/permitting times, that may require additional funding for the applicable division.</p>

Goal 2. Affordable Homeownership: Encourage and support affordable homeownership to create opportunities for wealth creation.

We recommend that the City pursue the following goal, which supports the existing Goal 3.2, Policy 3.2.1, and Goal 3.3 in the Comprehensive Plan:

- Encourage and support affordable homeownership education and development to increase equitable opportunities for homeownership and generational wealth creation.

The strategic actions to evaluate and potentially implement this goal are described below. The City may choose to adopt this goal or the results of the strategic actions into the Comprehensive Plan in the future.

2.a Evaluate Impediments to Homeownership and Their Removal	
Description	Type of Action
<p>Work with development stakeholder to develop a comprehensive review of the impediments to homeownership opportunities and evaluate actionable steps to remove those impediments.</p> <p>Barriers to homeownership and impediments may include saving for a down payment, access to down payment assistance, poor credit scores restricting households’ ability to obtain a mortgage, underproduction of homes for sale relative to demand, and lack of affordable homeownership opportunities (particularly in markets with rising home sales prices).</p> <p>The City may form partnerships with organizations that remove barriers by providing financial assistance, such as down payment assistance or paying down interest rates.</p>	<p>Remove Impediments</p>
Rationale	<p>Homeownership is one of the most effective (and primary ways) for households and individuals to build wealth. Further, renter households are more likely to be at risk of displacement than homeowners.</p>
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Extremely low and very low–income, low-income, and moderate-income households ▪ Income: 0-120% of Median Family Income ▪ Housing tenure: Owner ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This strategic action does not directly result in production of new housing but is intended to

	<p>make it easier for residents to afford homeownership.</p> <ul style="list-style-type: none"> - Equitable Outcomes: Removing barriers to homeownership opportunities can increase equitable outcomes by making it easier for households with lower incomes to become homeowners. ▪ Potential Risk: Impacts are likely to have no negative impact. ▪ Magnitude: Indirect, small
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2024 ▪ Implementation to commence: 2025 ▪ Time frame of impact: The strategic action can begin to take effect when it is adopted and implemented, once the impediments to homeownership are removed.
Implementation Steps	<ul style="list-style-type: none"> ▪ Work with partners to better understand impediments to homeownership in Tualatin. ▪ Develop programs or partnerships to lower or remove barriers to homeownership ▪ Provide outreach to eligible, prospective program participants to connect them with homeownership programs.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division Department ▪ Partners: Oregon Housing and Community Services; Portland Housing Center or other nonprofits (e.g., Oregon Housing Alliance, Housing Oregon, etc.)
Funding or Revenue Implications	<p>Establishing partnerships and identifying impediments to homeownership are comparatively low-cost strategies, primarily relying on the use of staff time.</p>

2.b Partner to Encourage Education about Homeownership Opportunities

Description	Type of Action
<p>Partner with a nonprofit homeownership education program.</p> <p>Consider partnering with the Portland Housing Center (or other nonprofit) to promote homeownership educational opportunities and to help refer interested people to the program. The Portland Housing Center may be a suitable partner as they currently provide guidance, financial services, and home buyer education to Portland-area residents.</p> <p>Tualatin may provide support to renters in their pursuit of becoming homeowners. The City may also provide support to residents in manufactured housing parks (who own their home but not the lot) to form a cooperative (a group of people organized for the purpose of owning and operating a housing park for the benefit of its members on a not-for-profit basis).</p>	<p>Establish Partnerships</p>
<p>Rationale</p>	<p>Responsible homeownership is one of the most effective (and primary ways) for households and individuals to build wealth. Further, in Oregon, renter households are more likely to be at risk of displacement than homeowners.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, low-income, and moderate-income households ▪ Income: 0-120% of Median Family Income ▪ Housing tenure: Owner ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This strategic action does not directly result in production of new housing but is intended to make it easier for residents to afford homeownership. - Equitable Outcomes: The City partnering with a homeownership education organization could result in new households actively planning with support for first-time homeownership and potentially attaining it. This could open up new opportunities for underserved communities as well as low-income and moderate-income households and others who are interested yet may never have had access to homeownership education and the possibility of wealth creation. ▪ Potential Risk: There are likely to be no or minor negative

	<p>impacts.</p> <ul style="list-style-type: none"> ▪ Magnitude: Low to moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: June 30, 2022 ▪ Implementation to commence: 2022 ▪ Time frame of impact: The strategic action can begin to have impacts when the partnerships are formed and the strategic action has begun to be implemented.
Implementation Steps	<ul style="list-style-type: none"> ▪ Review state homeownership resources. ▪ Establish a partnership with a nonprofit focused on encouraging and supporting homeownership opportunities in the Portland Region. ▪ Identify opportunities to help Tualatin residents achieve homeownership. ▪ Provide outreach to residents who rent in Tualatin to support their efforts in achieving homeownership. ▪ Consider offering a workshop or series of workshops on homeownership in coordination with partner organizations.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division Department ▪ Partners: Portland Housing Center or other nonprofits (e.g., Oregon Housing Alliance, Housing Oregon, etc.); Oregon Housing and Community Services.
Funding or Revenue Implications	<p>Encouraging residents to pursue homeownership education is a comparatively low-cost strategy, primarily relying on the use of staff time and/or community partners with support from staff to reach out to prospective/interested residents.</p>

2.c Partner with Organizations that Develop Affordable Ownership Housing

Description	Type of Action
<p>Explore partnership opportunities with a homeownership development organization, such as Habitat for Humanity or a land trust like Proud Ground, that develops and constructs affordable homes to own for households earning 0-80% Median Family Income.</p> <p>Habitat for Humanity (Portland Region) builds homes purposed for affordable homeownership for qualified, low-income families. Proud Ground is a community land trust that provides permanently affordable housing opportunities through funding that creates affordable home buying opportunities and management of real estate to ensure it remains permanently affordable. Tualatin could partner with these or other affordable housing development organizations, for example, by offering surplus or excess land (see Action 1.f), helping to identify suitable land, assisting with the assemblage of land, and providing support on funding applications for homeownership development in Tualatin or local gap funding contribution if funds are available such as through a Housing Trust Fund.</p>	<p>Establish Partnerships</p>
<p>Rationale</p>	<p>Increase the supply of housing available for homeownership for households with income below 80% of MFI.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, low-income, and moderate-income households ▪ Income: 0-80% of Median Family Income ▪ Housing tenure: Owner ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): The amount of housing to be produced over a six-year period as a result of this is likely to be on the order of 10 to 30 units, depending on the land or funds the City has to contribute to this effort. - Equitable Outcomes: The City partnering with a homeownership development organization could result in increased opportunities for homeownership for households that cannot generally afford homeownership. This could open up new opportunities for underserved communities as well as low-income and moderate-income households and others who are interested in homeownership and the possibility of wealth creation. ▪ Potential Risk: There are likely to be no or minor negative

	<p>impacts.</p> <ul style="list-style-type: none"> ▪ Magnitude: Low to moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2023 ▪ Implementation to commence: 2024 ▪ Time frame of impact: The strategic action can begin to have impacts when the partnerships are formed and the strategic action has begun to be implemented.
Implementation Steps	<ul style="list-style-type: none"> ▪ Establish a partnership with a homeownership development organization to support development of affordable homeownership opportunities. ▪ Identify funds (or land in Strategic Action 1.f) available to support affordable homeownership development
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: Habitat for Humanity, Proud Ground, or other homeownership development organizations
Funding or Revenue Implications	<p>Revenue implications vary depending on the amount of monetary support the City of Tualatin is willing to provide. Monetary support would reduce division budgets or general fund dollars unless a new funding source (tax or fee) is established/enacted.</p>

2.d

Evaluate Development Code to Encourage Diverse Housing Types for Affordable Homeownership

Description	Type of Action
<p>Evaluate Development Code changes to allow and support development of other affordable ownership housing types in Tualatin that provide affordable housing, beyond the required housing types in House Bill 2001.</p> <p>Other housing options may include dwelling units designed for multiple unrelated individuals living in the same dwelling with shared kitchen and bathrooms such as cohousing; small-scale homes (dwelling units between 100 and 500 square feet); and other innovative, small housing types (such as cargo containers). Allowing and clarifying standards for a diverse array of housing types would require development of clear and objective standards for these housing types.²⁸</p> <p>In addition, Tualatin’s Development Code does not currently allow small-scale dwellings, such as those at 100 to 500 square feet in size, at densities that would support development of this housing type as affordable housing.</p>	<p>Making Zoning Code Changes</p>
<p>Rationale</p>	<p>Comparatively small dwelling units can help meet identified housing needs for Tualatin’s workforce, particularly affordable homeownership opportunities.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, low-income, and moderate-income households ▪ Income: 0-120% of Median Family Income ▪ Housing tenure: Owner ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This action would not directly result in production of new units. But it is necessary to remove barriers to production of more types of housing in Tualatin. - Equitable Outcomes: This is an opportunity to provide more

²⁸ Tualatin’s Development Code defines household living as “the residential occupancy of a dwelling unit by a family or household, where the dwelling unit is self-contained with cooking, sleeping, and bathroom facilities.” In addition, Tualatin’s Development Code defines a household as “one or more persons related by blood, marriage, domestic partnership, legal adoption or guardianship, plus not more than five additional persons, who live together in one dwelling unit.” These definitions limits options for living situations with separate living quarters but with shared kitchen and bathrooms (such as “adult dorms”), in situations that do not qualify as group living (as defined by Tualatin’s Development Code).

	<p>lower-cost homeownership opportunities, which may help underserved communities and lower-income households, increasing diversity in neighborhoods.</p> <ul style="list-style-type: none"> ▪ Potential Risk: Allowing smaller units may increase density in existing neighborhoods, with the potential to cause concern for some of the existing residents but may be welcomed by other residents. ▪ Magnitude: Indirect, small
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2024 ▪ Implementation to commence: 2024 or early 2025 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented in the Development Code.
Implementation Steps	<ul style="list-style-type: none"> ▪ Review Development Code to identify and clarify innovative and diverse housing types in the Development Code. Consider housing definitions, types of units permitted, lot dimensions, height standards, and other related standards. ▪ Revise Development Code as needed.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: Development community
Funding or Revenue Implications	<p>Evaluating zoning code changes for allowed uses is a comparatively low-cost strategy, primarily relying on the use of staff time.</p>

Goal 3. Preservation of Regulated Affordable Housing: Preserve affordable housing to prevent the loss of existing affordable housing units and to prevent resident displacement.

We recommend that the City pursue the following goal, which supports the existing Goals 3.2 and 3.3 in the Comprehensive Plan:

- Preserve affordable housing to prevent the loss of existing affordable housing units and to prevent resident displacement.
- Ensure and support no net loss for affordable housing in the City through preservation of one-for-one unit replacement that will retain at least the current number of housing units affordable to households at or below 60% of area Median Family Income (MFI). The City would track and report on the no net loss of affordable housing annually and ensure there are affordability agreements to maintain long-term affordability.

The strategic actions to evaluate and potentially implement this goal are described below. The City may choose to adopt this goal or the results of the strategic actions into the Comprehensive Plan in the future.

3.a Evaluate How to Support Preservation of Regulated Affordable Rental Housing	
Description	Type of Action
<p>Encourage and support preservation of affordable rental housing for households earning 0-60% Median Family Income, working with the State and affordable housing partners to ensure no net loss of regulated affordable housing units.</p> <p>Two of Tualatin's three regulated housing properties have Low-Income Housing Tax Credit (LIHTC) projects that are privately owned and expire in 7 and 10 years, respectively. With nothing in place to protect from loss of these units upon expiration of the LIHTC, especially with the expansion of urban renewal districts and planning for redevelopment, these units could be lost.</p> <p>The City could, at a minimum, track the expiration of the tax credits for these properties. Recent state legislation established a regulatory framework for multifamily rental housing developments with expiring affordability restrictions across a range of state funding programs. Owners must give notice to local government and the state when affordability restrictions will expire, and owners must provide the</p>	<p>Adopt a Program</p>

opportunity for the state, local government, or designee to make an offer to purchase the property and to match a competing offer.²⁹

The City could also develop a program to enforce a policy about no net loss of regulated affordable housing, in addition to tracking expiration of the tax credits. If the City develops a policy to avoid losing regulated affordable housing, it will need to identify how to support and enforce that policy, as discussed below.

Two of Tualatin's three regulated housing properties have Low-Income Housing Tax Credit (LIHTC) projects that are privately owned and expire in 7 and 10 years, respectively. Preserving affordability of these properties is a priority for the City. The legislation mentioned above can make it easier for Tualatin to track these properties. The City may also want to have outreach to these property owners to establish relationships with them and better understand their intentions when the tax credits are near to expiration.

For these or other properties in a similar situation, the City could work to identify organizations (e.g., nonprofit affordable housing providers) that might be willing and able to acquire the properties if the owners seek to sell or convert them to market rate. The City could also reach out to the property owner before the end of the affordability period to offer technical assistance with preservation options and make them aware of any City programs or incentives available at that time to support maintaining affordability (e.g., tax exemptions).

Rationale	Preservation of existing and expiring regulated affordable housing is a more cost-effective strategy to maintain the supply than building new affordable housing.
Anticipated Impact	<ul style="list-style-type: none">▪ Populations served: Extremely low and very low-income residents and households▪ Income: 0-60% of Median Family Income▪ Housing tenure: Renter▪ Potential Benefit:<ul style="list-style-type: none">- Housing Production (new units): Tualatin has three regulated affordable housing units with a total of 604 income-restricted units. One of these developments (with 100 units made affordable through the LIHTC) is set to expire in January 2028. Preserving this development, for example, could maintain 100

²⁹ Oregon Housing and Community Services (OHCS), "Preservation Compliance (for Owners)," <https://www.oregon.gov/ohcs/compliance-monitoring/Pages/push.aspx>. Accessed 3/18/21.

	<p>units of affordable housing in the city, resulting in no net loss of regulated affordable housing units, which is a significantly positive impact. However, this strategy would not directly result in the production of new units.</p> <ul style="list-style-type: none"> - Equitable Outcomes: Residents living in affordable housing with tax credits coming up for expiration may be particularly vulnerable to displacement. Preservation and no net loss policies for regulated affordable housing may offer a level of protection from displacement for low-income and vulnerable residents living in affordable housing. - Potential Risk: There are likely to be no or minor negative impacts. <ul style="list-style-type: none"> ▪ Magnitude: Moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2025 ▪ Implementation to commence: 2026 ▪ Time frame of impact: This strategic action will begin to take effect in 2026. The impact will really be felt as the existing tax exemptions begin to expire on a property-by-property basis, which will begin to occur after this strategic action is implemented.
Implementation Steps	<ul style="list-style-type: none"> ▪ Reach out to the GSL Properties (property owners of Terrace View, Tualatin Meadows, and Woodridge) to learn their plans for these properties once affordability restrictions expire. If ownership has changed, then reach out to current property owner. ▪ The City may offer assistance or connect the property owner to other supportive options should any of these properties be at risk for converting back to market rate.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: GSL Properties and other property owners of affordable housing in Tualatin.
Funding or Revenue Implications	<p>Outreach to a single property owner is a low-cost strategy, primarily relying on the use of staff time. Depending on the program, a no net loss policy may involve a funding source to carry it out, such as CET.</p>

3.b Evaluate Developing a Healthy Housing Initiative for Multifamily Housing

Description	Type of Action
<p>Evaluate developing a Healthy Housing Initiative to address life safety, mold, lead, and ventilation issues for multifamily housing.</p> <p>A Healthy Housing Initiative could involve proactive inspection of renter-occupied multifamily properties to identify issues similar to those mentioned above. In addition, this initiative could include an educational component to provide information on how to prevent these issues from developing and funding plan to address the issues identified through inspections.</p> <p>This strategic action would be connected with Action 8.b, a Healthy Housing Initiative for Single-Family Housing</p>	<p>Implement a Program to Provide Financial Resources</p>

<p>Rationale</p>	<p>To improve older multifamily properties in Tualatin that are lower cost, unregulated, and deteriorating. The City needs this housing stock, and it is important that housing stays affordable while ensuring habitable and healthy conditions for residents.</p>
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<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Extremely low and very low-income, and low-income ▪ Income: 0-80% Median Family Income ▪ Housing tenure: Rental ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This action focuses on addressing safety problems in existing housing, not producing new housing. If this action is used to assist 10 to 25 households per year, it may help 60 to 150 households over the 6-year period for the HPS. - Equitable Outcomes: Residents living in rental housing in poor condition are more likely to have lower incomes and fewer housing choices. Supporting a Healthy Housing Initiative can improve the conditions of rental housing, which may help protect vulnerable residents. ▪ Potential Risk: Most negative impacts would be borne by the property owner to address identified deficiencies, though there likely would be positive impacts for the property owner too, such as property value increases and longer-term renters, resulting in increased revenue. If the property owner makes substantial changes to the housing and must bear the entire cost, that may
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	<p>result in increased rents without some form of rent control agreement.</p> <ul style="list-style-type: none"> ▪ Magnitude: Moderate to large, depending on the outreach of the program
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2024 ▪ Implementation to commence: 2025 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented.
Implementation Steps	<ul style="list-style-type: none"> ▪ Evaluate the benefit of establishing a Healthy Housing Initiative with interested stakeholders and the public. Conduct outreach to housing consumers and property owners/managers of older, multifamily rental properties to gauge interest in resources and to identify questions/concerns about a potential inspection program. ▪ If the initiative is deemed important, draft code language that covers mold, lead, ventilation, and other healthy/safety issues. ▪ Develop an educational component of the program in coordination with the Community Development Department with representation between Planning, Building, and Engineering. ▪ Establish program parameters: How can residents file complaints? How are inspections administered? How are alleged issues communicated to property owners? How are mitigation requests enforced? ▪ Establish source of funds to administer the program. ▪ Discuss topic with City Council at work sessions and in a public hearing if desired. Tualatin City Council may adopt the program and code language via ordinance.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: Washington County Public Housing Authority, Community Alliance of Tenants (CAT)
Funding or Revenue Implications	<p>A source of funds to administer the program may be needed, such as CET funds. Alternatively, some additional staff time may be needed if the program is primarily informational.</p>

Goal 4. Preservation of Naturally Occurring Affordable Housing (NOAH): Preserve naturally occurring affordable housing, where possible, to prevent loss of affordable units and to mitigate resident displacement.

We recommend that the City pursue the following goal, which supports the existing Goals 3.2 and 3.3 in the Comprehensive Plan:

- Preserve naturally occurring affordable housing to prevent loss of affordable units and to prevent and mitigate resident displacement.

Implementing this goal will require developing a program to preserve “naturally occurring affordable housing” through acquisition, low interest loans/revolving loan fund for preservation, code enforcement, or other approaches. The strategic actions to evaluate and potentially implement this goal are described below. The City may choose to adopt this goal or the results of the strategic actions into the Comprehensive Plan in the future.

4.a Evaluate Development of Incentives to Preserve Low-Cost Rentals for Below-Market-Rate Privately Owned Rental Housing	
Description	Type of Action
<p>Evaluate options to assist with needed improvements to existing low-cost rental housing where the housing is in poor condition. The options may include a tax abatement (such as the Multi-Unit Property Tax Exemption), low interest loan program, or other financial incentives for low-cost market-rate apartments that agree to make needed improvements (e.g., to address code violations or health/safety issues) without displacing existing residents or agree to stabilize or reduce rents.</p> <p>Needed improvements may include addressing code violations or health/safety issues. The City would need to ensure they only grant financial incentives to property owners who agree to stabilize/reduce rents or not displace existing residents.</p> <p>Much of the rental housing in Tualatin that is affordable to low and moderate-income households is older, privately owned rental housing that is not subject to affordability restrictions. This housing may have deferred maintenance issues as a result of a lack of resources to make improvements and pay for repairs (or, in some cases, owner neglect). The City could work with property owners of low-cost unregulated rental housing to support needed repairs without displacing tenants. This could include:</p> <ul style="list-style-type: none"> ▪ Offer low interest loans and/or grants to property owners for 	<p>Establish Financial Incentives</p>

	<p>repairs and major rehabilitation, providing they do not displace residents.</p> <ul style="list-style-type: none"> ▪ Evaluate reducing regulatory requirements and permitting challenges for owners seeking to improve older rental housing. ▪ Provide information/technical assistance to smaller property owners regarding state and local resources to support weatherization and healthy housing. ▪ Use the Multi-Unit Property Tax Exemption (Action 4.b) to support rehabilitation of multifamily housing, as described in Action 4.b. <p>The City may want to begin implementing this strategic action with a limited scope pilot program to test and fine tune this program.</p>
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Rationale	This action focuses on improvement of the condition of existing housing. Keeping low-cost unregulated housing both habitable and affordable reduces the need for subsidized new construction.
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, and low-income ▪ Income: 0-80% of Median Family Income ▪ Housing tenure: Renter ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This strategy is not anticipated to produce new units, but it could improve the quality of the city’s existing supply of low-cost, regulated rental units. - Equitable Outcomes: Preservation mechanisms would protect these vulnerable populations from housing displacement. ▪ Potential Risk: If there are not effective mechanisms in place to ensure that housing will be affordable for the populations served, the rents may increase, making the housing less affordable and potentially displacing tenants. ▪ Magnitude: Moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2026 ▪ Implementation to commence: 2027 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented, as the incentives start to be used.
Implementation Steps	<ul style="list-style-type: none"> ▪ Define eligibility for this program based on income. Eligibility requirements should tell whether all units in the multifamily building serve households with incomes 80% of MFI or less or whether a minimum percentage of units should be rented to

	<p>households with incomes below 80% of MFI. In addition, the City should determine whether assistance goes to the property owner or another entity</p> <ul style="list-style-type: none"> ▪ Develop a list of lower-cost, unregulated rental housing, including property locations, number of units per development, and property owner contact information. ▪ Evaluate programs, technical assistance opportunities, regulatory changes, and other options to support property improvements. This step can include multiple approaches, as noted in the description of this action. ▪ Reach out to property owners (identified in Step 1). Gauge their interest in improving the safety, health, and stability of their property. Determine what kinds of improvements their properties might need and what resources would be most useful to them. ▪ Refine and implement programs, technical assistance opportunities, regulatory changes, and other options (identified in Step 2) based on feedback from property owners. ▪ Connect interested property owners to established programs and opportunities. ▪ Seek additional federal funding through the US Department of Housing and Urban Development’s (HUD’s) Lead Hazard Control and Healthy Homes program
<p>Lead Agency and Potential Partners</p>	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: Property owners of low-cost, unregulated rental housing
<p>Funding or Revenue Implications</p>	<p>Amending permitting and regulatory requirements or providing technical assistance and information are comparatively low-cost strategies, primarily relying on the use of staff time. Providing low interest loans, grants, or implementing the MUPTE tax exemption would require a funding source to backfill program dollars awarded/loaned. Implementing a new program such as the HUD Lead Hazard Control and Healthy Homes program would take extensive administrative and partner resources to meet federal regulatory requirements, including performance measures.</p>

4.b Evaluate Using the Multiple Unit Property Tax Exemption to Slow Rental Cost Increases

Description	Type of Action
<p>Evaluate the Multi-Unit Property Tax Exemption (MUPTE) as a tool to incentivize rehabilitation of existing low-cost unregulated affordable multifamily without displacing or increasing rents for existing tenants. The savings from the tax exemption could help the property owner pay for the costs of rehabilitation over time.</p> <p>To qualify, owners of multifamily rental properties who are applying for MUPTE would need to enter into a contract with a public agency (such as the City of Tualatin) that would set affordability restrictions; the terms of the affordability restrictions can be set by the City, and there are no specific income/affordability requirements in the state statute that enable the program. The City must also show that the exemption is necessary to preserve or establish low-income units.³⁰ The exemption applies to the improvement value of the property (not the land value). The exemption is initially for 10 years (per statute), but it could be extended for as long as the housing is subject to the affordability contract.</p> <p>The exemption would apply only to the City’s portion of property taxes unless taxing districts representing 51% or more of the combined levying authority (including the City’s tax rate) agree to support the exemption.</p>	<p>Adopt a Tax Exemption to Reduce Ongoing Charges on Development</p>
<p>Rationale</p>	<p>The MUPTE program is flexible and eligibility criteria can be set locally, allowing the City to target solutions to meet its needs. It can offer an incentive for mixed-income housing, providing a way to leverage private, market-rate development to expand affordable housing.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, and low-income households ▪ Income: 0-80% of Median Family Income ▪ Housing tenure: Rental ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): If this incentive was used for one to two existing apartment buildings at about 150 units

³⁰ The statute does not specify how to show that the exemption is necessary.

	<p>each, if 10-20% of units were affordable, this strategy could result in 30 to 60 units below market rate.</p> <ul style="list-style-type: none"> - Equitable Outcomes: This strategic action would preserve naturally occurring affordable housing for tenants, such as those vulnerable to displacement or housing instability if rents increased or rent discounts were not offered. ▪ Potential Risk: The City and participating taxing districts would forgo property tax income for the properties that qualify for MUPTE. This would reduce some revenue for city services and for participating taxing districts. ▪ Magnitude: Moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2026 ▪ Implementation to commence: 2027 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented, when property owners begin to apply for the tax exemption.
Implementation Steps	<ul style="list-style-type: none"> ▪ Determine desired eligibility criteria (e.g., affordability requirements and any other public benefit requirements). ▪ Seek input from overlapping taxing districts on their willingness to support the exemption. ▪ Discuss topic with City Council at work sessions and in public hearings. City Council may choose to adopt MUPTE by resolution or ordinance following a public hearing. ▪ Follow up with overlapping taxing districts to request that they pass resolutions to support the exemption.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division and City of Tualatin Finance Department ▪ Partners: Overlapping Taxing Districts
Funding or Revenue Implications	<p>MUPTE reduces general fund revenues for all overlapping taxing districts. The City of Tualatin must weigh the loss of tax revenue against value of the rent discounts offered by qualifying development.</p>

Goal 5. Housing for Underserved Communities: Implement housing policies, projects, programs, and partnerships to further support racial and social equity.

We recommend that the City pursue the following goal, which supports the existing Goal 3.2 and Goal 3.3 in the Comprehensive Plan:

- Implement all City housing policies with consideration for racial and social equity, which recognizes historical inequities in housing to underserved communities and aims to rectify inequities going forward by establishing an equitable housing program and a measurable action plan toward equitable housing.
- City of Tualatin affirmatively furthers access to decent, affordable housing in locations near the services and destinations to thrive, ensuring equal access for underserved communities.
- Promote access to opportunity by encouraging and supporting affordable housing, workforce housing, mixed-use housing, and mixed-income housing that meets the cultural needs of diverse populations by providing multiple unit sizes, types, and tenure options in high-opportunity areas.

The strategic actions to evaluate and potentially implement this goal are described below. The City may choose to adopt this goal or the results of the strategic actions into the Comprehensive Plan in the future.

5.a

Consider Development of a Funding Action Plan to Implement the HPS with Attention to Equity

Description	Type of Action
<p>Consider development of a funding action plan that would include how best to implement the strategic actions in the Housing Production Strategy (HPS) through considerations of equity.</p> <p>Implementing housing policies in an equitable way goes beyond affordability – it aims to ensure all people have housing choices that are diverse, high quality, physically accessible, and reasonably priced with access to opportunities, services, and amenities (e.g., transit, schools, childcare, food, and parks). These issues are addressed throughout the 12 goals and the strategic actions in the HPS.</p> <p>A key to implementing the HPS with consideration of equity is identifying and securing resources to implement the HPS. The City could develop an action plan that refines the schedule described in the HPS and develop a confirmed budget with identified funding sources for the implementation of the HPS. This action plan could be adopted by City Council.</p> <p>Part of implementation of the HPS could be ongoing outreach to underserved communities to get feedback on prioritization of action and resources called for in the HPS. This outreach could build on the Equity Resolution adopted by the City Council on February 22, 2021, that confirms the City of Tualatin’s commitment to local actions that promote equity and other equity planning the City has recently been engaged in.</p> <p>A part of implementing the HPS will be assessing, aligning, and updating the strategic questions, perhaps at the three-year point of the HPS. Key questions that the City could consider at this point include:</p> <ul style="list-style-type: none"> • Is there a need to reprioritize the strategic actions based on changing conditions or feedback from stakeholders, including underserved communities? • Are additional actions needed to address new or changing conditions? • How will the City fund implementation of the HPS? • Is staff capacity sufficient to meaningfully advance the strategic actions? 	<p>Develop a Funding Action Plan</p>

- What benefits has the City seen from its efforts to date? Are the City’s residents, especially its lower-income residents and communities of color, seeing a return on the investments that the City has made?

These and other questions could be addressed as part of developing the funding action plan.

Rationale	The purpose of a HPS is to increase access to housing with an emphasis on low and moderate-income households but also to further racial and social equity.
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Low-income and moderate-income households, underserved communities, communities of color, other state and federal protected classes ▪ Income: Emphasis on households with incomes below 120% of Median Family Income ▪ Housing tenure: Renter or Owner ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This strategy alone would not result in additional units, but it may result in better housing outcomes for more people. - Equitable Outcomes: This strategic action is aimed at developing an equitable action plan to support the HPS work. This may need to be done in two phases (as noted in Exhibit 6) as the evaluation of funding resources and incentives are planned to occur over the course of the six-year HPS. This process may raise community awareness and increase participation from underserved communities. ▪ Potential Risk: The strategy will require explicit consideration of funding sources, which may raise issues and considerable dialogue regarding specific funding strategies. This is not necessarily negative, but it could be challenging. ▪ Magnitude: Indirect, large
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: June 30, 2023 ▪ Implementation to commence: 2023 ▪ Time frame of impact: This strategic action will begin to have impact when adopted. However, the funding plan resulting from this strategic action is central to the implementation of other parts of HPS.

<p>Implementation Steps</p>	<ul style="list-style-type: none"> ▪ Identify City’s overarching policy objectives for equity and understand how housing equity fits into those objectives. ▪ Develop a public engagement plan that can guide conversations with the community, stakeholders, housing producers, and service providers. Focus conversations on opportunities and constraints related to equitable development and the priorities of the strategic actions in the HPS to build equity. ▪ Through these conversations, identify and document recommendations for prioritization of resources and strategic actions to achieve more equitable housing outcomes. ▪ Identify specific sources of funding for implementing the HPS and establish a budget for implementing each action. ▪ Report on the findings of engagement and implementation progress of the HPS, with recommendations for consideration by the Tualatin City Council. ▪ Tualatin City Council should revisit prioritization of the strategic actions in the HPS based on these findings.
<p>Lead Agency and Potential Partners</p>	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: Underserved communities in Tualatin, Tualatin TuaLatinos (previously the Diversity Task Force), all residents of Tualatin, Tigard-Tualatin School District, Washington County Housing Authority, Metro, area developers, service providers, nonprofits, and residents of Tualatin.
<p>Funding or Revenue Implications</p>	<p>Research and development of an analysis to impediments is a time-intensive analysis, primarily relying on the use of staff time. The City may consider approaching Metro about funding this type of outreach, as it is closely connected with the equitable housing planning grants that Metro has made since 2016. The next grant funding cycle will start in fall 2021.</p>

5.b Evaluate Impediments to Fair Housing to Create an Analysis of Impediments

Description	Type of Action
<p>Evaluate impediments to Fair Housing and create an Analysis of Impediments, starting with Washington County’s Analysis of Impediments completed in May 2020.³¹</p> <p>Fair housing is the right to choose housing free from unlawful discrimination. An analysis of impediments to fair housing is a process that recipients of grant funds from the US Department of Housing and Urban Development (HUD) must go through to receive funds. Jurisdictions can choose to conduct this analysis to affirmatively further fair housing on their own.</p> <p>An analysis of impediments would identify fair housing issues in Tualatin (in the context of Washington County), the factors that contribute to those issues, and strategies to address those issues. Among other topics, the analysis would consider patterns of segregation, racial/ethnic concentrations of poverty, and disproportionate access to opportunity and housing needs.</p> <p>The analysis concludes with a set of recommendations to inform future policies that will promote fair housing choice and inclusivity.</p>	<p>Conduct Research and Develop Policy Recommendations</p>
Rationale	<p>Improving fair housing is foundational to family success and helps to achieve broader equity goals.</p>
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Low-income, moderate-income, and high-income residents and households, communities of color, and all state and federal protected classes ▪ Income: All income groups ▪ Housing tenure: Renter or Owner ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This strategy alone would not result in additional units, but it may result in better housing outcomes for more people. - Equitable Outcomes: Likely to increase community awareness regarding fair and equitable housing and inform future policies. ▪ Potential Risk: This strategic action may raise challenging issues

³¹ <https://www.co.washington.or.us/CommunityDevelopment/Planning/upload/FinalAI.pdf>

	<p>and considerable community dialogue, but it is also likely to result in increased community awareness and a useful set of recommendations.</p> <ul style="list-style-type: none"> ▪ Magnitude: Moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2024 ▪ Implementation to commence: 2025 ▪ Time frame of impact: The strategic action will begin to have impact once the analysis is completed and the impediments begin to be removed.
Implementation Steps	<ul style="list-style-type: none"> ▪ Establish a planning process to develop an analysis of impediments, following HUD guidelines. Establish recommendations to resolve impediments. ▪ Conduct public and stakeholder outreach to gather feedback on the recommendations. ▪ Pursue action with City Council, should the plan’s recommendations lead to a desire to revise or adopt new policies.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: City Council, Tigard-Tualatin School District, Washington County, Metro, Oregon Housing and Community Services, area developers, service providers, nonprofits, and regional foundations.
Funding or Revenue Implications	<p>Research and development of an analysis to impediments is a time-intensive analysis, primarily relying on the use of staff time. If the City hires a consultant to complete the analysis, the amount of staff time required to complete the analysis will decrease and the City will need to fund the cost of the consultant’s analysis. The City should consider hiring a consultant to complete this analysis and assist community engagement. The consultant should have considerable expertise in fair housing and fair housing analysis.</p>

5.c

Evaluate Ways to Best Ensure Opportunities for Education about Fair Housing Are Provided

Description	Type of Action
<p>Ensure there are opportunities for education about Fair Housing for residents, property owners, property managers, those involved in real estate transactions, Tualatin City staff, Tualatin Planning Commission, and Tualatin City Council. The City could contract with the Fair Housing Council of Oregon to conduct these trainings.</p>	<p>Provide Education</p>
Rationale	<p>Education about Fair Housing is important to preventing and addressing housing discrimination.</p>
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Low-income, moderate-income, and high-income residents and households, communities of color, and all state and federal protected classes. ▪ Income: All income levels ▪ Housing tenure: Renter or Owner ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This strategy alone would not result in additional units, but it may result in better housing outcomes for more people. - Equitable Outcomes: This strategic action is likely to raise community awareness about this topic and help to prevent discrimination. ▪ Potential Risk: There are likely to be no or minor negative impacts. ▪ Magnitude: Moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: No need for adoption or official action, as this strategic action is about forming a partnership. ▪ Implementation to commence: 2023 ▪ Time frame of impact: The strategic action can begin to have impacts when the partnerships are formed and the strategic action has begun to be implemented.
Implementation Steps	<ul style="list-style-type: none"> ▪ Partner with the Fair Housing Council of Oregon to identify educational needs and conduct trainings. These trainings should occur on a regular basis, such as every few years. ▪ Tualatin could provide written Fair Housing information for residents, property managers, property owners, and those involved with real estate transactions.

Lead Agency and Potential Partners	<ul style="list-style-type: none">▪ Lead Agency: City of Tualatin Planning Division▪ Partners: Fair Housing Council of Oregon
Funding or Revenue Implications	By partnering with the Fair Housing Council of Oregon, this is likely to be a lower-cost strategy, primarily relying on the use of staff time to coordinate education opportunities and funding to pay for the trainings.

5.d Evaluate Strategies to Encourage Diverse Housing Types in High-Opportunity Neighborhoods

Description	Type of Action
<p>Encourage development of diverse housing types in high-opportunity neighborhoods, such as neighborhoods with high environmental quality and access to transit, jobs, good schools, parks, and open spaces.</p> <p>Enable developments that support multiple unit sizes, types, and tenure options to promote diverse housing options in high-opportunity neighborhoods. Use an analysis of “access to opportunity” to decide which zones or locations (via zoning overlay) where this is appropriate. The purpose of this strategy is to promote access to opportunity to households with a range of backgrounds and incomes. This strategy may work well with the incentives for development of affordable and workforce housing.</p>	<p>Provide Education</p>
Rationale	<p>Reverse historical patterns of racial, ethnic, cultural, and socioeconomic exclusion.</p>
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, low-income, and moderate-income households, communities of color, and all state and federal protected classes ▪ Income: 0-80% of Median Family Income ▪ Housing Tenure: Renter ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This strategy may result in a modest increase in development of new diverse housing types that are smaller in size across the city, especially on small infill lots. - Equitable Outcomes: By locating a diverse range of smaller housing types in high-opportunity areas, it may increase access to amenities for households at 80% MFI and below to better schools, parks, modes of transportation, health-care facilities, shopping, and other neighborhood amenities they might not otherwise have had access to. ▪ Potential Risk: Allowing more diverse housing types may increase density in existing neighborhoods, with the potential to cause concern by some of the existing residents. ▪ Magnitude: Moderate

Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2024 ▪ Implementation to commence: 2024 or early 2025 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented. It may take some years after implementation for development resulting from this strategic action to begin to occur.
Implementation Steps	<ul style="list-style-type: none"> ▪ Identify high-opportunity areas and capacity in these areas to accommodate a range of housing types. ▪ Evaluate incentives and regulatory changes that would support diverse housing in opportunity areas, such as MUPTE or a property tax exemption for regulated affordable housing. ▪ Talk with developers about the incentives most likely to incent them to develop a wider variety of housing types in identified opportunity areas.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: Tualatin Planning Division ▪ Partners: Developers of affordable housing, workforce housing, and market-rate housing.
Funding or Revenue Implications	<p>This is a comparatively low-cost strategy, primarily relying on the use of staff time.</p>

Goal 6. Workforce Housing: Encourage, plan for, and support the development of workforce housing for households earning 61%-80% Median Family Income, for both owner and renter, in order to increase the jobs-housing balance, reduce commute time, and provide attainable housing for workers in Tualatin.

We recommend that the City pursue the following goal, which supports the existing Goal 3.2 in the Comprehensive Plan:

- Encourage, plan for, and support the development of workforce owner and rental housing, 61-80% Median Family Income to increase the jobs-housing balance, reduce commute time, and provide attainable housing for workers in Tualatin.

The strategic actions to evaluate and potentially implement this goal are described below. The City may choose to adopt this goal or the results of the strategic actions into the Comprehensive Plan in the future.

6.a Evaluate Ways to Incentivize Inclusion of Workforce Housing Units within New Multifamily Rental Development	
Description	Type of Action
<p>Evaluate the feasibility of establishing a tax abatement for new multifamily development that includes a portion of units affordable between 61 and 80% of Median Family Income under the Multi-Unit Property Tax Exemption program (MUPTE).</p> <p>The state-authorized, locally implemented MUPTE program would allow Tualatin to offer a partial property tax exemption (limited to the value of the housing, not the land) for multifamily development that meets specific, established criteria by the City, such as having an affordability agreement with the City of Tualatin or another public agency.³² The terms of the affordability agreement could be set by the City – there are no specific income/affordability requirements in the state statute that enables the program. The exemption would apply only to the City’s portion of property taxes, unless taxing districts representing 51% or more of the combined levying authority (including the City’s tax rate) agree to support the exemption. It would last for 10 years or longer if the affordability agreement remains in place. The City would need to seek support from overlapping taxing districts to offer the exemption for all property taxes (not just the City’s portion).</p>	<p>Adopt a Tax Exemption</p>

³² If the abatement were being applied to a project that does not have state or federal affordability requirements, the City could enter into the contract directly with the property owner or seek to partner with Washington County, which would administer the affordability agreement.

The City could explore using MUPTE in two possible ways:

- To incentivize mixed-income development through inclusion of below-market units in otherwise market-rate developments.
- To incentivize owners of existing low-cost unregulated affordable housing to rehabilitate properties without displacing existing tenants or escalating rents (Strategic Action 4.b).

Rationale	The MUPTE program is flexible and eligibility criteria can be set locally, allowing the City to target the housing to meet its needs. It can offer an incentive for mixed-income housing, providing a way to leverage private, market-rate development to expand affordable housing.
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Low-income residents and households ▪ Income: 61-80% of Median Family Income ▪ Housing tenure: Renters ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): If this incentive was used for one to two apartment buildings at about 150 units each and 10-20% of units were affordable to low-income households,³³ this strategy could result in 30 to 60 workforce-affordable units. - Equitable Outcomes: Provides the opportunity for mixed income in multifamily housing, with a portion of units affordable to low-income residents. ▪ Potential Risk: The City and participating taxing districts would forgo some property tax income for the duration of the exemption, reducing some revenue for city services and revenue for participating taxing districts. ▪ Magnitude: Moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2026 ▪ Implementation to commence: 2027 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented, when property owners begin to apply for the tax exemption.

³³ Where jurisdictions are trying to incentivize or require mixed-income housing, it is typically structured so that a certain percentage of units in the building (e.g., 10% to 25%) meet a certain affordability level (e.g., 61% to 80% of MFI).

<p>Implementation Steps</p>	<ul style="list-style-type: none"> ▪ Determine desired eligibility criteria (e.g., affordability requirements and any other public benefit requirements). ▪ Seek input from overlapping taxing districts on their willingness to support the exemption. ▪ Discuss topic with City Council at work sessions and in public hearings. City Council may choose to adopt MUPTE by resolution or ordinance following a public hearing. ▪ Follow up with overlapping taxing districts to request that they pass resolutions to support the exemption.
<p>Lead Agency and Potential Partners</p>	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: Tualatin Finance Department and Overlapping Taxing Districts
<p>Funding or Revenue Implications</p>	<p>MUPTE reduces general fund revenues for all overlapping taxing districts. The City of Tualatin must weigh the loss of tax revenue against value of the rent discounts offered by qualifying development.</p>

6.b

Evaluate Potential Partnerships with Employers on Employer-Assisted Housing

Description	Type of Action
<p>Evaluate the potential for the City to partner with one or more area employers to develop an Employer Assisted Housing program.</p> <p>Employer Assisted Housing can take many forms, such as: short-term relocation assistance, medium-term rental assistance, and homeownership assistance (such as down payment assistance).</p> <p>The City could talk with major employers to identify opportunities to partner with or support employers who are interested in developing an employer-assisted housing program. The City's role in development of an Employer Assisted Housing program could be to provide support and information to employers and help them connect with partners who can assist them in developing a program.</p>	<p>Establish Partnerships</p>
<p>Rationale</p>	<p>Brings local businesses into the discussion of housing needs and efforts to encourage housing development.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Employees working in Tualatin who also desires to live in Tualatin ▪ Income: Generally less than 120% of MFI ▪ Housing tenure: Renter or owner ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): Depends on interest and employer’s funding potential. An employer may provide rental assistance or down payment assistance for a few employees. Alternatively, a single employer developing a moderate-size apartment complex could produce 20 to 40 units of housing. - Equitable Outcomes: There is a significant need for workforce housing in Tualatin, so that workers employed here— particularly in the industrial and commercial sectors— can also afford to live here. This strategic action may help to meet that need. ▪ Potential Risk: There are likely to be no or minor negative impacts. ▪ Magnitude: Low to moderate depending on interest from employers

<p>Timeline</p>	<ul style="list-style-type: none"> ▪ Timeline for adoption: No need for adoption or official action, as this strategic action is about forming a partnership. ▪ Implementation to commence: 2025 ▪ Time frame of impact: The strategic action can begin to have impacts when the partnerships are formed and the strategic action has begun to be implemented.
<p>Implementation Steps</p>	<ul style="list-style-type: none"> ▪ Evaluate the potential to periodically host an employer roundtable or focus group to educate, discuss, and work through Tualatin’s housing issues. ▪ Inquire if employer-supported housing programs would be of interest to larger employers in Tualatin. What questions do they have about how such a program would function? ▪ Identify ways the City could help interested employers establish an employer-assisted housing program.
<p>Lead Agency and Potential Partners</p>	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: Larger employers in Tualatin; Chamber of Commerce
<p>Funding or Revenue Implications</p>	<p>Unless the City wishes to financially support an employer-assisted housing program, this strategy could be a comparatively low-cost option, primarily relying on the use of staff time.</p>

6.c Evaluate City Partnership to Participate in a Land Bank

Description	Type of Action
<p>Evaluate potential partnerships with organization(s) to establish or support a land bank for affordable housing, workforce housing, mixed-use housing, or combination of these types.</p> <p>Land banks can take several forms. Many are administered by a nonprofit or nongovernmental entity with a mission of managing a portfolio of properties to support affordable housing development over many years or decades. A land bank could be set up to manage financial and administrative resources, including strategic property disposal, for the explicit purpose of supporting affordable housing development. Cities can partner with nonprofits or manage their own land banks. Cities may also donate, sell, or lease publicly owned land for the development of affordable housing, even without a formal “land bank” organization. Another source of land for a land bank is religious institutions.</p> <p>If Tualatin determines it is able to contribute publicly owned land or work with partners on land contributions (such as religious institutions), then this action will connect to Strategic Action 1.f.</p>	<p>Establish Partnerships</p>
<p>Rationale</p>	<p>Land banks support affordable housing development by reducing or eliminating land cost from development.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, low-income, and moderate-income households ▪ Income: 0-80% of Median Family Income ▪ Housing tenure: Renter or Owner ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): If this incentive were used for one to two apartment buildings at about 75 units each, and if all of these units were affordable at 80% of MFI or less, this strategy could result in a mix of units affordable to households below 60% of MFI as well as units affordable to households between 61% and 80% of MFI. <p>Alternatively, potential lands could be evaluated for their use to develop affordable owner-occupied housing, likely in housing types such as single-family detached units, town houses, cottage housing, duplexes, triplexes, or quadplexes. If</p>

	<p>Tualatin had about two to five acres of land for land banking for these types of units, that may result in 20 to 45 units, assuming densities of 10 to 15 dwelling units per acre.</p> <ul style="list-style-type: none"> - Equitable Outcomes: Land banking is proposed for the purpose of efficiently developing affordable housing and/or workforce housing. ▪ Potential Risk: If public land is used for affordable housing, typically it cannot be used for other city functions. However, if the land were identified as surplus or excess, it would likely not be needed for city functions. If institutional land (such as church land) were land banked, this would not impact city functions. ▪ Magnitude: Low to moderate as Tualatin has a highly limited land supply
<p>Timeline</p>	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2024 ▪ Implementation to commence: 2025 ▪ Time frame of impact: The strategic action can begin to have impacts when the partnerships are formed and the strategic action has begun to be implemented.
<p>Implementation Steps</p>	<ul style="list-style-type: none"> ▪ Evaluate use of existing GIS tools to inventory publicly and privately owned properties (including properties owned by faith-based organizations) in areas well suited for a land bank purpose. ▪ Partner with and contribute funds or land to an existing nonprofit land bank or participate in the formation of a new nonprofit land bank if one does not exist with sufficient capacity to serve Tualatin. ▪ Incorporate publicly owned land into a bank or acquire new land to incorporate.
<p>Lead Agency and Potential Partners</p>	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: Nonprofit Land Bank; public agencies and/or institutions, including faith-based organizations in Tualatin; affordable housing developers; City of Tualatin Finance Department; and other divisions at the City of Tualatin (as needed)
<p>Funding or Revenue Implications</p>	<p>Partnering is the most administratively efficient and cost-efficient approach to implementing this strategy. If the City is contributing land to the land bank at low or no cost, then the City is forgoing realizing the value of the land if it were sold on the open market.</p>

Goal 7. Housing Stabilization: Prevent and address homelessness to provide safe living conditions for everyone living in Tualatin.

We recommend that the City pursue the following goal, which supports the existing Goals 3.2 and 3.3 in the Comprehensive Plan:

- Prevent and address homelessness to provide safe living conditions for everyone living in Tualatin.

The strategic actions to evaluate and potentially implement this goal are described below. The City may choose to adopt this goal or the results of the strategic actions into the Comprehensive Plan in the future.

7.a Evaluate Opportunities to Partner on a Local Rental and Utility Assistance Program	
Description	Type of Action
<p>Evaluate opportunities to partner with an agency that provides rental and utility assistance partnership to stabilize households and prevent people from losing their homes.</p> <p>The City is currently exploring a partnership or collaboration with the Community Action Agency, including targeted outreach to underserved communities. For rental assistance, the household must be under 80% of Area Median Income. For utility assistance, the household must be under 60% of Oregon’s median income. They are two separate programs. The City is in a trial period of this partnership with the Community Action Agency, which lasts through December 2021. The partnership may be extended beyond that date.</p>	<p>Establish Partnerships</p>
Rationale	<p>Rental and utility assistance can provide stability to households at risk of homelessness or loss of utility services.</p>
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, and low-income households ▪ Income: Under 80% of Area Median Income for rental assistance and under 60% of Oregon Median Income for utility assistance. ▪ Housing tenure: Renter ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This strategy will not directly result in the production of more units. - Equitable Outcomes: The rental and utility assistance partnership in the planning stages includes targeted outreach

	<p>to historically underserved communities and households in low-income census tracts.</p> <ul style="list-style-type: none"> ▪ Potential Risk: There are likely to be no or minor negative impacts. ▪ Magnitude: Moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: This action may not be adopted, as it is a partnership. ▪ Implementation to commence: 2021, with potential extension of the partnership into 2022 and beyond ▪ Time frame of impact: The strategic action can begin to have impacts when the partnerships are formed and the strategic action has begun to be implemented.
Implementation Steps	<ul style="list-style-type: none"> ▪ Work with the Community Action Agency to develop a memorandum of understanding for a rent and utility assistance partnership to support lower-income households in Tualatin.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division; Tualatin Finance Department ▪ Partners: Community Action of Washington County, nonprofit agency
Funding or Revenue Implications	<p>Unless the City financially supports the rental and utility assistance program, this strategy is a comparatively low-cost option, primarily relying on the use of staff time, possibly using City phones for volunteers to carry out the targeted outreach.</p>

7.b

Evaluate Ways to Develop Housing Options and Services to Address and Prevent Houselessness

Description	Type of Action
<p>Evaluate partnering with agencies and nonprofit organizations that provide housing and services to people experiencing houselessness to address and prevent homelessness.</p> <p>Explore establishing partnerships, programs, or opportunities to rapidly rehouse people experiencing homelessness.</p>	<p>Establish Partnerships</p>
Rationale	<p>To improve livelihoods by reducing the number of people experiencing homelessness in Tualatin and Washington County.</p>
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income residents and people currently experiencing houselessness ▪ Income: 0-30% of Median Family Income ▪ Housing tenure: Renter ▪ Potential Impacts: <ul style="list-style-type: none"> - Housing Production (new units): This strategy may not result in production of new units in itself, but it may lead to partnerships that will support production of new units. - Equitable Outcomes: This strategic action may result in partnering with another jurisdiction or organization to serve people experiencing houselessness. ▪ Potential Risk: There are likely to be no or minor negative impacts. ▪ Magnitude: Moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2026 ▪ Implementation to commence: 2027 ▪ Time frame of impact: The strategic action can begin to have impacts when the partnerships are formed and the strategic action has begun to be implemented.
Implementation Steps	<ul style="list-style-type: none"> ▪ Contact staff with City of Tigard to understand what Tigard plans to do around providing services to address and prevent houselessness. Evaluate whether there are opportunities to partner with Tigard. ▪ Contact Washington County to explore options for a partnership with the County to provide services to address and prevent houselessness.

Lead Agency and Potential Partners	<ul style="list-style-type: none">▪ Lead Agency: City of Tualatin Planning Division▪ Partners: City of Tigard; Washington County
Funding or Revenue Implications	This strategy will depend primarily on staff outreach to Tigard and Washington County to explore options for partnerships. It could result in development of programs that have financial implications for the City, but none are proposed in this strategic action at this point.

Goal 8. Housing Rehabilitation: Plan for and support housing programs and initiatives that are responsive to the safety and health needs of households earning 0-80% of Median Family Income.

We recommend that the City pursue the following goal, which supports the existing Goal 3.2, Policy 3.2.1, and Goal 3.3 in the Comprehensive Plan:

- Plan for and support housing programs and initiatives that are responsive to the safety and health needs of households earning 0-80% of Median Family Income.

Implementing this policy will require researching, evaluating, and developing a housing rehabilitation program, for both ownership and rental housing, suitable for Tualatin. The strategic actions to evaluate and potentially implement this goal are described below. The City may choose to adopt this goal or the results of the strategic actions into the Comprehensive Plan in the future.

8.a Evaluate Establishing Local Housing Rehabilitation Program

Description	Type of Action
<p>Evaluate the feasibility of establishing a local housing rehabilitation program to improve housing safety and health conditions for households earning 80% or less of the Median Family Income.</p> <p>Much of the rental housing in Tualatin that is affordable to low and moderate-income households is older, privately owned housing that is not subject to affordability restrictions. This housing may have deferred maintenance issues as a result of a lack of resources to make improvements and pay for repairs (or, in some cases, owner neglect). The City can work with property owners of low-cost unregulated rental housing to support needed repairs without displacing tenants. This could include:</p> <ul style="list-style-type: none"> Offer low interest loans and/or grants to property owners for repairs and major rehabilitation, providing they do not displace residents. Explore reducing regulatory and permitting requirements in the Development Code to identify and reduce challenges for owners seeking to improve older rental housing. Provide information/technical assistance to smaller property owners regarding state and local resources to support weatherization and healthy housing. Use the Multi-Unit Property Tax Exemption (Action 4.b) to support rehabilitation, as described in Action 4.b. 	<p>Develop a Program</p>

Rationale	Keeping low-cost unregulated housing both habitable and affordable reduces the need for subsidized new construction.
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, and low-income households ▪ Income: 0-80% of Median Family Income ▪ Housing tenure: Renter ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This strategy is not anticipated to produce new units, but it is intended to preserve and may improve the quality of the City’s existing supply of low-cost, regulated rental units. It may also result in improved health and safety for the residents in the existing units. - Equitable Outcomes: Improves housing safety and health conditions for households earning 80% or less of the Median Family Income. ▪ Potential Risk Most negative impacts would be borne by the property owner to address identified deficiencies. However, property may also have positive impacts, such as an increase in property value and longer-term renters. If the property owner makes substantial changes to the housing, that may increase rents (making it less affordable) or encourage conversion to owner-occupied housing. ▪ Magnitude: Low to moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2026 ▪ Implementation to commence: 2027 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented, as the incentives start to be used.
Implementation Steps	<ul style="list-style-type: none"> ▪ Maintain and enhance the existing list of lower-cost, unregulated rental housing, including property locations, number of units per development, and property owner contact information. ▪ Evaluate programs, technical assistance opportunities, regulatory changes, and other options to support property improvements. This step can include multiple approaches, as noted in the description of this action. ▪ Reach out to property owners (identified in Step 1). Gauge their interest in improving the safety, health, and stability of their property. Determine what kinds of improvements their properties might need and what resources would be most useful to them. ▪ Refine and implement programs, technical assistance

	<p>opportunities, regulatory changes, and other options (identified in Step 2) based on feedback from property owners.</p> <ul style="list-style-type: none"> ▪ Connect interested property owners to established programs and opportunities. ▪ Seek additional federal funding through the US Department of Housing and Urban Development’s (HUD’s) Lead Hazard Control and Healthy Homes program.
<p>Lead Agency and Potential Partners</p>	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Community Development Department, City of Tualatin Finance Department, and City of Tualatin Building Division and Engineering Division. ▪ Partners: Overlapping taxing districts (if using MUPTE), Washington County Public Housing Authority, and Community Alliance of Tenants (CAT)
<p>Funding or Revenue Implications</p>	<p>Providing low interest loans, grants, or implementing the MUPTE tax exemption will require a funding source to backfill program dollars awarded/loaned. Implementing a new program such as the HUD Lead Hazard Control and Healthy Homes program would take extensive administrative and partner resources to meet federal regulatory requirements, including performance measures.</p>

8.b Evaluate the Implementation of a Healthy Housing Initiative for Single-Family Housing

Description	Type of Action
<p>Evaluate the development of a Healthy Housing Initiative to address life safety, mold, lead and ventilation issues for single-family housing.</p> <p>A Healthy Housing Initiative could involve proactive inspection of single-family properties to identify issues similar to those mentioned above. In addition, this initiative could include an educational component to provide information on how to prevent these issues from developing and funding to address the issues identified in the inspections.</p> <p>This strategic action could be connected with Strategic Action 3.b, a Healthy Housing Initiative for Multifamily housing.</p>	<p>Implement a Program to Provide Financial Resources</p>
<p>Rationale</p>	<p>To improve older single-family properties in Tualatin that are lower cost, unregulated, and deteriorating. The City needs this housing stock, and it is important that housing stays affordable while ensuring habitable and healthy conditions for residents.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, low-income, and moderate-income households ▪ Income: 0-80% of Median Family Income ▪ Housing tenure: Rental or owner ▪ Potential Benefits: <ul style="list-style-type: none"> - Housing Production (new units): This action focuses on addressing safety problems in existing housing, not producing new housing. If this action is used to assist 10 to 25 households per year, it may help 60 to 150 households over the 6-year period for the HPS. - Equitable Outcomes: Improves health and safety conditions in housing for qualifying households at 80% MFI or below. ▪ Potential Risk: Most negative impacts would be borne by the property owner to address identified deficiencies. However, the property owner may experience positive impacts too, such as increased property value and longer-term renters. If the property owner makes substantial changes to the housing, that may increase rents (making it less affordable) or encourage conversion to owner-occupied housing. ▪ Magnitude: Moderate to large, depending on the outreach of the program

Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2024 ▪ Implementation to commence: 2025 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented.
Implementation Steps	<ul style="list-style-type: none"> ▪ Evaluate the benefit of establishing a Healthy Housing Initiative with interested stakeholders and the public. Conduct outreach to housing consumers and property owners/managers of older, single-family rental to gauge interest in resources and to identify questions/concerns about a potential inspection program. Consider initial grant research funding source, such as the Robert Wood Johnson Foundation. https://www.rwjf.org/en/how-we-work/grants-and-grant-programs.html ▪ If the initiative is deemed important, draft code language that covers mold, lead, ventilation, and other healthy/safety issues. ▪ Develop an educational component of the program in coordination with the Community Development Department with representation between Planning, Building, and Engineering. ▪ Establish program parameters: How can residents file complaints? How are inspections administered? How are alleged issues communicated to property owners? How are mitigation requests enforced? ▪ Establish source of funds to administer the program. ▪ Discuss topic with City Council at work sessions and in a public hearing if desired. Tualatin City Council may adopt the program and code language via ordinance.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Community Development Department ▪ Partners: Washington County Public Housing Authority, Community Alliance of Tenants (CAT), AARP
Funding or Revenue Implications	<p>A source of funds to administer the program may be needed, such as CET funds. Alternatively, some additional staff time may be needed if the program is primarily informational.</p>

Goal 9. Accessible Design and Other Specialized Design: Encourage and support Universal Design, Lifelong Housing Certification, and other similar standards.

We recommend that the City pursue the following goal, which supports the existing Goal 3.2 and Policy 3.2.1 and Goal 3.3 in the Comprehensive Plan:

- Encourage and support Universal Design, Lifelong Housing Certification, and other similar standards.

The strategic actions to evaluate and potentially implement this goal are described below. The City may choose to adopt this goal or the results of the strategic actions into the Comprehensive Plan in the future.

9.a Evaluate the Development of Specialized Design Standards and Incentives to Accommodate Special Needs	
Description	Type of Action
<p>Research and evaluate development of standards in the City’s development, building, and municipal codes to increase development of housing accessible for people with disabilities and other populations that need housing with specialized design.</p> <p>Disabilities include those that are visible, such as ambulatory or vision disabilities, and those that are not readily apparent, such as self-care, independent living, or cognitive disabilities. Other conditions may require special accommodations, such as disabling diseases or mental health conditions.</p> <p>Standards to accommodate special needs may include universal design components (e.g., basic accessibility features; security or communication systems; easily traversed floors; remote control features; accessible lavatories, sinks, and counters; accessible bathtubs and showers; variable height counters and accessible work surfaces; and hearing and visual impairment aids).</p> <p>Provide incentives in the Development Code to increase the number of units designed to meet Universal Design, Lifelong Housing Certification, and other similar standards. This strategy could include preapproved plan sets (e.g., single-family detached and attached homes with barrier-free universal design),³⁴ within the context of the</p>	<p>Develop Code Standards and Develop Incentives</p>

³⁴ It may be that these types of plan sets become commonly used among different cities in Oregon, not necessarily developed from the ground up for each city.

American with Disabilities Act (ADA) and Federal Housing Administration (FHA) rules.

One option could be to use the Oregon Lifelong Housing Certification program,³⁵ which lists accessibility at different levels of accessible design elements, such as “visitor accessible” (which is basic accessibility for visitors) and “enhanced accessible” (which is accessible for a person in a wheel chair for the central living floor). Consider offering path-of-travel improvements like curb ramps on the adjoining street/sidewalk.

In consultation with the Building Department, the City may decrease charges (plan check fee) by 50% for preapproved plans and that the review to approve time would be three days, rather than potentially several weeks.

Rationale	Provide more options for people to live independently or in a housing setting of their choice.
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Seniors and people with disabilities ▪ Income: Standards may apply to All Income Groups; Use of incentives may apply only to income qualifying households ▪ Housing tenure: Renter and Owner ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This strategy will not directly result in the production of new units, but it may increase the number of new units that have accessibility features incorporated into the design—or it may increase the number of units remodeled with accessibility features. - Equitable Outcomes: Serves people with disabilities, people with special needs, and seniors to provide housing accessibility, many of whom may also be low income. ▪ Potential Risk: There should be minimal negative impact if the strategic action is implemented as described above. If the City requires special design standards for all new housing (which is not recommended), that may increase housing development costs and decrease housing affordability. ▪ Magnitude: Low

³⁵ The Rogue Valley Council of Government’s Lifelong Housing Certification Project is a “voluntary certification process for evaluating the accessibility and/or adaptability of homes. Developed in partnership with AARP Oregon, the project is designed to help meet the growing market demand for accessible housing in our region and to enable older adults and people with disabilities to age in place safely and independently.” Information about this certification program can be found at: <https://rvcog.org/home/sds-2/lifelong-housing-program/#:~:text=The%20Lifelong%20Housing%20Certification%20Project,call%20541%2D423%2D1383>.

<p>Timeline</p>	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2024 ▪ Implementation to commence: 2025 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented in the Development Code.
<p>Implementation Steps</p>	<ul style="list-style-type: none"> ▪ Develop an incentive program and source of funding to increase the number of dwelling units designed accessibly. ▪ Work with developers to gather feedback on program parameters and interest. ▪ Implement program (and potentially a new funding source) through council action.
<p>Lead Agency and Potential Partners</p>	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Community Development Department ▪ Partners: Home Builders Association of Metropolitan Portland; Fair Housing Council of Oregon; AARP
<p>Funding or Revenue Implications</p>	<p>Developing preapproved plans may require hiring consultants to develop the plans. Lowering the fee to review the preapproved plans should be commensurate with the lower staff effort to review the plans.</p>

Goal 10. Mixed-Use Housing and Redevelopment: Encourage and support development of mixed-use, mixed-income, and multifamily housing in commercial zones and urban renewal areas for households earning 0-80% of Median Family Income.

We recommend that the City pursue the following goal, which supports the existing Goal 3.2, Goal 3.3, Goal 3.4, and Policy 3.4.1 and Policy 3.4.2 in the Comprehensive Plan:

- Encourage and support development of mixed-use, mixed-income, and multifamily housing in commercial zones and urban renewal areas for households earning 0-80% of Median Family Income.

This goal includes affordable housing (0-60% of Median Family Income) and may include workforce housing (61-80% of Median Family Income). Development of mixed-use housing will likely also result in development of housing affordable above 80% of Median Family Income. The strategic actions to evaluate and potentially implement this goal are described below. The City may choose to adopt this goal or the results of the strategic actions into the Comprehensive Plan in the future.

10.a Evaluate Redevelopment Opportunities for the Creation of Mixed-Use Development Districts to Support Development of Affordable Housing and Workforce Housing

Description	Type of Action
<p>Identify and evaluate redevelopment opportunities to create mixed-use districts, which could include an area master planning process to guide development.</p> <p>A key finding of the Housing Needs Analysis is that Tualatin has limited land for development of multifamily housing and projects deficits of land to accommodate new housing in the Medium High Density and High Density / High Rise plan designations. The Economic Opportunities Analysis finds that Tualatin has limited land for commercial development. The COVID 19 pandemic has resulted in closure of businesses, which will leave existing buildings with vacant spaces and lessen the pressure for development of new commercial space, at least in the next two to five years.</p> <p>To address the need for more land for multifamily housing development and commercial uses, the City could identify several areas within Tualatin for redevelopment into mixed-use areas, with a mixture of higher-density housing and employment uses such as retail, office, and commercial services. These may be underutilized commercial or industrial areas ripe for mixed-use or mixed-income redevelopment. Two of these areas may already be identified through</p>	<p>Develop a Planning Process and Redevelopment Plans for Mixed-Use Districts</p>

planning for Urban Renewal Districts: District 1 is the Basalt Creek and Southwest Industrial Area and District 2 is the North Study Area, Bridgeport Village, Town Commons, I-5 Corridor, and Tualatin-Sherwood Road. The City has yet to have discussions about funding for affordable housing in these areas.

The City could engage the community in developing a vision for redeveloping the selected areas. The planning to implement this vision could be developed through redevelopment plans that show how the property will be redeveloped into a vibrant area with a mixture of uses, connections with Tualatin’s automotive and pedestrian/bicycle transportation networks, and a variety of housing types. The redevelopment plans would typically include working with landowners to ensure they are supportive of the plans, as well as incorporating stakeholder and citizen input into the vision for the district and the formation of the redevelopment plans.

A key aim would be to ensure equitable funding for affordable housing development to serve households earning 0-60% of Median Family Income and to consider opportunities for workforce housing at 61-80% of Median Family Income in mixed-use districts and urban renewal areas through redevelopment. To ensure that the districts provide opportunities for development of income-restricted affordable housing and consider workforce housing (housing affordable for rent between 61% and 80% of MFI), the City could evaluate opportunities to implement strategic actions such as 1.a (property tax exemption for income-restricted housing), 1.d (planning for Urban Renewal), 1.f (public and other land for affordable housing), 6.a (inclusion of workforce housing in multifamily development), and regulatory actions in Policy 11.

Rationale	Creating mixed-use districts would provide opportunity for development of new multifamily housing in areas with commercial services and access to some types of jobs.
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Low-income, moderate-income, and high-income residents ▪ Income: Inclusive of income-restricted housing development that will serve 0-60% of Median Family Income and workforce housing at 61-80% of Median Family Income. ▪ Housing tenure: Renter or Owner ▪ Potential Impacts: <ul style="list-style-type: none"> - Housing Production (new units): The amount of housing

	<p>production depends on the size and number of properties that are redeveloped. If this strategy identified 5 acres of land for residential redevelopment over the six-year planning horizon, at 80 units per acre (assuming 4 to 6 story buildings), this strategy could produce between 400 units of housing. Achieving this density will require changes to the Tualatin Development Code to allow this level of density.</p> <ul style="list-style-type: none"> - Equitable Outcomes: Equitable funding for housing development for affordable housing and workforce housing in mixed-use districts and urban renewal areas through redevelopment. ▪ Potential Risk: Redevelopment could displace existing residents. Lower-income residents may be most vulnerable to redevelopment and urban renewal, unless housing preservation actions are taken and affordable housing investments are made to offset displacement. ▪ Magnitude: Large
<p>Timeline</p>	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2022 ▪ Implementation to commence: 2023 ▪ Time frame of impact: It would likely be at least 5 to 10 years before there is sufficient revenue in the Urban Renewal District to have enough funds to make significant investment in housing. The strategic action may have impact sooner for redevelopment that does not depend on Urban Renewal.
<p>Implementation Steps</p>	<ul style="list-style-type: none"> ▪ Identify and evaluate areas within Tualatin for redevelopment into mixed-use areas, which may be Urban Renewal District 1 and District 2 and additional areas. ▪ Engage the community in developing a vision for redeveloping the selected areas. ▪ Use available tools, such as Urban Renewal, to support redevelopment of these areas. ▪ Identify opportunities for supporting development of income-restricted affordable housing. Also consider opportunities for workforce housing. Funding for housing affordable in the 61-80% MFI is limited and may be difficult to find. ▪ Identify land to rezone for mixed-use (see Strategic Action 10.b), as part of the redevelopment planning. ▪ Identify infrastructure improvements necessary to support development of the mixed-use district. Incorporate these improvements and costs into the City’s capital improvements plan.

	<ul style="list-style-type: none"> ▪ Develop the policies and development standards necessary to support development of a mixed-use district. ▪ Work with the Planning Commission and City Council to adopt the redevelopment plans and begin implementing them.
<p>Lead Agency and Potential Partners</p>	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: City of Tualatin Finance Department, City of Tualatin Engineering and Building Division, and Developers
<p>Funding or Revenue Implications</p>	<p>Developing and implementing plans for mixed-use districts will take substantial staff time and may require hiring consultants. Developing mixed-use district plans will have broader funding implications, especially for infrastructure development.</p>

10.b Evaluate Opportunities for Conversion of Commercial Buildings to Residential Uses

Description	Type of Action
<p>Identify and evaluate opportunities for housing above ground-floor retail, which would require an update to the Development Code to allow more housing above ground-floor retail in commercial areas.</p> <p>Tualatin has several underutilized commercial buildings, such as stores that have closed, that could be appropriate for redevelopment. The City could work with landowners to evaluate opportunities for redeveloping vacant buildings for new housing.</p> <p>The City could consider opportunities to support redevelopment of underutilized commercial buildings as part of developing a mixed-use district and redevelopment in Strategic Action 10.a. Implementing this action may depend, in part, on use of tools such as urban renewal (Strategic Action 1.d) to address infrastructure deficiencies or support development of affordable housing</p> <p>The City could also consider opportunities for conversion of some ground-floor retail to allow housing on the ground floor. This strategic action would be connected closely to Strategic Action 10.a, as a part of developing a mixed-use district and supporting development of income-restricted affordable housing and potentially workforce affordable housing.</p>	<p>Implement a Program</p>

Rationale	Reusing vacant commercial buildings provides additional opportunities for housing, as well as making better use of an unused site.
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Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, and low-income households ▪ Income: 0-80% of Median Family Income ▪ Housing tenure: Predominantly renter housing with some opportunities for owner-occupied housing ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): One existing building is about 60,500 square feet. Assuming that 75% of the building is used for housing (and the remainder used for shared spaces, like hallways), they may reasonably be converted into 56 units approximately 800 square feet in size or 37 units approximately 1,200 square feet in size. Two other older existing buildings
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	<p>that could be converted to housing are in the town center area and just west of town center and include: one at 15,000 square feet and the other 10,000 square feet. Under the same assumptions as above, these buildings together may result in 16 to 24 dwelling units.</p> <ul style="list-style-type: none"> - Equitable Outcomes: Potential to provide housing for all income ranges. ▪ Potential Risk: There are likely to be no or minor negative impacts. ▪ Magnitude: Low to moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: June 30, 2023 ▪ Implementation to commence: 2023 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented, but redevelopment will depend on when the building owners move forward.
Implementation Steps	<ul style="list-style-type: none"> ▪ Identify one or more vacant buildings that could be converted to residential uses. ▪ Discuss interest in converting vacant buildings to residential uses with the owners or assess the owners’ interest in selling the buildings. ▪ Act as a convener between the owners and potential developers. ▪ Assist with the development process to make it easier for redevelopment to occur. This development may require a rezone from a commercial zone into a mixed-use zone where housing is allowed. ▪ Pursue the appropriate process for permitting the reuse of the building(s)
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: Property owners of buildings considered for redevelopment and possibly adjacent/nearby property owners
Funding or Revenue Implications	<p>Developing and implementing plans for conversion of vacant buildings for residential use will require staff time and may require City support for rezoning.</p>

10.c Evaluate Opportunities to Rezone Land for Mixed-Use

Description	Type of Action
<p>Identify and evaluate opportunities to rezone commercial or industrial land for mixed-use that includes employment and residential uses.</p> <p>In development of the mixed-use districts (Strategic Action 10.a), the City could identify opportunities to rezone underutilized land to a mixed-use zone. In addition, the City may identify other opportunities to rezone underutilized land to support mixed-use development in areas not included in the new mixed-use districts.</p>	<p>Make Change to Zoning Map</p>
Rationale	<p>This would help to address Tualatin’s limited residential land base and to increase the supply of land that can accommodate residential uses outright.</p>
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Low-income, moderate-income, and high-income residents and households ▪ Income: All income levels ▪ Housing tenure: Predominantly renter housing with some opportunities for owner-occupied housing ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): The amount of housing production depends on the size and number of properties that are redeveloped. If this strategy identified 2 to 5 acres of land for residential redevelopment over the six-year planning horizon, at 80 units per acre (assuming 4 to 6 story buildings), this strategy could produce between 40 and 160 units of housing. Achieving this density will require changes to the Tualatin Development Code to allow this level of density. - Equitable Outcomes: Potential to provide mixed-use housing that is inclusive of affordable and workforce housing. ▪ Potential Risk: If successfully implemented, rezoning land could displace existing residents. Lower-income residents may be most vulnerable to rezoning, unless housing preservation actions are taken in conjunction with rezoning. ▪ Magnitude: Large
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2022 ▪ Implementation to commence: 2022 ▪ Time frame of impact: The strategic action can begin to take effect once land is rezoned.

Implementation Steps	<ul style="list-style-type: none"> ▪ Establish criteria to identify land to rezone for mixed-use (employment and residential) purposes. ▪ Pursue a public process (with public hearings) to implement the zone change.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: Property owners of land considered for rezoning as well as adjacent/nearby property owners
Funding or Revenue Implications	<p>This strategy would rely on use of staff time but may also require funds to hire a consultant to comply with the Transportation Planning Rule.</p>

10.d Evaluate Establishing Incentives to Support Mixed-Use Development, such as the Vertical Housing Tax Abatement

Description	Type of Action
<p>Identify, evaluate, and promote potential financial incentives for developers of mixed-use housing. Evaluate feasibility of adopting the Vertical Housing Tax Abatement within urban renewal districts or mixed-use zones.</p> <p>This program would provide a partial exemption of property taxes for multistory, mixed-use developments (residential over commercial space) for 10 years, which reduces operating costs and improves development feasibility.</p> <p>Using this program, a jurisdiction could subsidize mixed-use projects to encourage dense development or redevelopment by providing a partial property tax exemption on the building value for qualified developments. The exemption varies in accordance with the number of residential floors on a mixed-use project with a maximum property tax exemption of 80% of improvement value over 10 years. An additional property tax exemption on the land may be given if some or all of the residential housing is for low-income persons (80% of area median income or below), but this is uncommon. The Vertical Housing Tax Abatement helps to support affordable housing by providing retail opportunities nearer to income-restricted building. There is no tax exemption on the nonresidential component.</p> <p>The exemption is only available within areas designated by the City as a vertical housing development zone. The City must consider the potential for displacement of households within a proposed vertical housing development zone before designating the zone.</p> <p>Once the zone is established, a developer may apply for the Vertical Housing Tax Abatement program for eligible projects.</p>	<p>Adopt a Tax Exemption</p>
<p>Rationale</p>	<p>This tax abatement offers incentives for market-rate, mixed-income, and affordable housing, with greater incentives for affordable/mixed-income housing. It incents higher-density development, as well as mixed-income and mixed-use development.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: All populations potentially ▪ Income: Typically over 80% of Median Family Income unless applied to affordable housing (which is unusual)

	<ul style="list-style-type: none"> ▪ Housing tenure: Renter ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): If this incentive were used for one to two mixed-use apartment buildings at 50 to 150 units each with 25% of units affordable at less than 80% of Median Family Income, this strategy could contribute to development of 50 to 300 units. - Equitable Outcomes: Supports mixed-use housing, which may include workforce housing with retail or other uses. ▪ Potential Risk: The City and participating taxing districts would forgo property tax income for the duration of the exemption for the buildings where the exemption is granted, reducing revenue for city services and revenue for participating taxing districts. This tax abatement may disproportionately benefit moderate and high-income households, who can afford the rents in mixed-use housing unless affordable housing units are part of the mix. ▪ Magnitude: Moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2023 ▪ Implementation to commence: 2024 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented, when property owners begin to apply for the tax exemption.
Implementation Steps	<ul style="list-style-type: none"> ▪ Evaluate the feasibility of and potential locations for establishing a Vertical Housing Tax Abatement Zone. ▪ If considering designating areas within existing or proposed urban renewal districts, consider potential impacts of the tax abatement on urban renewal financial forecasts. ▪ Evaluate likely impacts of the tax exemption on feasibility of desired mixed-use development. ▪ Evaluate impacts of the exemption and the potential resulting development on displacement for vulnerable populations. ▪ Discuss topic with City Council at work sessions and in public hearings. ▪ Notify overlapping taxing districts and offer the opportunity to opt out of having their rate included in the exemption.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: City of Tualatin Finance Department, developers

Funding or Revenue Implications

The Vertical Housing Tax Abatement results in foregone general fund revenues for all overlapping taxing districts (unless they opt out). However, it can still increase tax revenue if new development occurs that would not otherwise, because the commercial portion is taxable immediately and the residential portion is added to the tax rolls when the abatement expires. If applied within an urban renewal district, the tax abatement instead affects the tax increment revenue to the district and does not necessarily directly affect the overlapping taxing districts.

Goal 11. Regulatory and Zoning Changes: Increase housing development opportunities through regulatory and zoning changes to accommodate a diverse range of housing types and price points to meet the housing needs in Tualatin.

We recommend that the City pursue the following goal, which supports the existing Policy 3.1.2, Goal 3.2, Policy 3.2.1, and Goal 3.3 in the Comprehensive Plan:

- Increase housing development opportunities through regulatory and zoning changes to accommodate a diverse range of housing types and price points to meet Tualatin's housing needs as identified in the current adopted Housing Needs Analysis.

The strategic actions to evaluate and potentially implement this goal are described below. The City may choose to adopt this goal or the results of the strategic actions into the Comprehensive Plan in the future.

11.a Evaluate Updating Density Standards for Multifamily Housing in Medium-Density, High-Density, and Mixed-Use Zones	
Description	Type of Action
<p>Evaluate the feasibility of increasing maximum densities—which would require corresponding revisions to other standards, including maximum lot coverage and minimum front setbacks—to create the opportunity for more efficient multifamily development in zones that allow it outright (High Density, High Density High-Rise, Medium Density High, Medium Density Low, and MUCOD (mixed-use zone)).</p> <p>Initial feasibility analysis indicates that existing densities for multifamily are too low to allow for efficient development or redevelopment of the type of housing the zones are intended to allow. At least one of the High Density and/or High Density High-Rise zones, as well as MUCOD, should allow for efficient 4 to 6 story buildings, and at least one zone (e.g. High Density and/or Medium Density High) should allow for efficient 2-3 story apartment buildings. Updates in the Medium Density High and Medium Density Low zones should be informed by changes to comply with HB 2001.</p> <p>One consideration in increasing density could be proximity to transit service and transit stations. Areas closer to transit, particularly high-capacity/high-frequency transit stations, may provide opportunities for increases of density in the Medium-Density, High-Density, and mixed-use zones. Areas near transit or transit stations may be places where density could be increased and parking requirements (in Strategic Action 11.c) could be decreased somewhat.</p>	<p>Adopt Zoning Code Changes</p>

<p>Rationale</p>	<p>Increasing densities and revising zoning standards allows more efficient use of buildable land, which may be particularly effective in areas with access to transit or near to transit stations. Given Tualatin’s shortage of buildable land, allowing taller multifamily buildings will provide important opportunities for housing development.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, low-income, moderate-income, and high-income households ▪ Income: All income levels ▪ Housing tenure: Predominantly renter, possibly some owner units ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): Tualatin has 16 acres of High Density and no acres of High Density High-Rise land, according to the Tualatin Housing Needs Analysis. If the City increased densities in these zones (from the current maximum density of 25 units per acre in High Density and 30 dwelling units per acre High Density High-Rise) to at least 80 units per acre (assuming 4 to 6 story buildings), that would allow for an additional 1,280 dwelling units to be built in High Density. If land is re-zoned to High Density High-Rise, that would allow for additional development at these higher densities. - Equitable Outcomes: May open up opportunity for development of affordable rental multifamily housing or workforce housing. ▪ Potential Risk: Allowing higher-density development may cause concern for some existing residents. ▪ Magnitude: Large
<p>Timeline</p>	<ul style="list-style-type: none"> ▪ Timeline for adoption: June 30, 2022 ▪ Implementation to commence: 2022 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented in the Development Code.
<p>Implementation Steps</p>	<ul style="list-style-type: none"> ▪ Evaluate conceptual feasibility with stakeholders and the public, identifying opportunities to alleviate resident concerns about traffic and parking as well as those associated with allowing taller buildings and denser development. ▪ Evaluate potential transportation and other public utility system impacts of potential changes. ▪ Draft revised zoning standard amendments, providing opportunities for public comment and discussions with planning

	<p>commissioners and city councilors.</p> <ul style="list-style-type: none"> ▪ Work with Tualatin’s Planning Commission and City Council to adopt the revised standards into the Development Code.
<p>Lead Agency and Potential Partners</p>	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Community Development Department ▪ Partners: City of Tualatin Public Works Department, area developers, property owners, and adjacent/nearby property owners and residents.
<p>Funding or Revenue Implications</p>	<p>Revising zoning standards would rely on staff time and hiring a consultant to analyze the impacts of density increases on transportation and other public utility systems.</p> <p>For areas near transit or transit stations, Tualatin could apply for one of Metro’s Transit-Oriented Development (TOD) grants to implement this strategic action.</p>

11.b Evaluate Opportunities to Rezone Lower-Density Residential Land to Higher Density

Description	Type of Action
<p>Evaluate and identify opportunities to re-zone Residential Low Density and Residential Medium Low-Density residential land for higher-density housing in selected areas.</p> <p>The Tualatin Housing Needs Analysis report showed that Tualatin has very little buildable land in the following zones: Medium High Density, High Density, and High Density High-Rise zones. The report identified a seven acre deficit of land in the Medium High Density zone and a four acre deficit in the High Density High-Rise zone for development through 2040.</p>	<p>Adopt Zoning Code Changes</p>
<p>Rationale</p>	<p>This could help to address Tualatin’s limited residential land base and to increase the supply of land that can accommodate residential uses at higher densities.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Low-income, moderate-income, and high-income residents and households ▪ Income: All income levels ▪ Housing tenure: Predominantly renter housing with some opportunities for owner-occupied housing ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): The amount of housing production depends on the size and number of properties that are rezoned. If this strategy identified 2 to 5 acres of land for residential redevelopment over the six-year planning horizon, at 70 to 150 units per acre (assuming 4 to 6-story buildings), this strategy could produce between 140 and 750 units of housing from land zoned Low Density. - Equitable Outcomes: May open up opportunity for development of affordable rental multifamily housing or workforce housing. ▪ Potential Risk: Rezoning land could displace existing residents. Lower-income residents may be most vulnerable to rezoning, unless affordable housing preservation actions are taken in conjunction with rezoning. ▪ Magnitude: Moderate to large, depending on the amount of land rezoned

Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: June 30, 2022 ▪ Implementation to commence: 2022 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented in the Development Code.
Implementation Steps	<ul style="list-style-type: none"> ▪ Establish criteria to identify land to rezone for higher-density residential uses. ▪ Pursue a public process (with public hearings) to implement the zone changes.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: Property owners of land considered for rezoning as well as adjacent/nearby property owners
Funding or Revenue Implications	Revising density standards is a comparatively low-cost strategy, primarily relying on the use of staff time.

11.c Evaluate the Feasibility of Targeted Reductions to Off-Street Parking Requirements

Description	Type of Action
<p>Evaluate the feasibility of providing off-street parking reductions targeted for multifamily and/or affordable housing, particularly in conjunction with nearby transit availability.</p> <p>Current parking ratios for multifamily create an additional potential obstacle to higher-density/efficient development, particularly for affordable housing and zones that are intended for higher-density housing (four or more stories in height). High parking ratios for retail and restaurants may also present an obstacle to mixed-use development.</p> <p>Tualatin could consider allowing reduction of parking requirements near transit and affordable housing with tenants who generally own fewer cars, like seniors. In addition, the City should consider allowing public on-street parking in rights-of-way within a certain radius to count toward off-street parking requirements.</p> <p>This strategic action should be implemented in conjunction with the increases to density in High Density and High Density High-Rise zones, in Strategic Action 11a, because the strategic actions work together to achieve higher densities.</p>	<p>Adopt Zoning Code Changes</p>
Rationale	<p>Reducing parking requirements reduces costs and can allow a development to fit more units on a site, making public resources go further.</p>
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Low-income, moderate-income, and high-income households ▪ Income: All income levels ▪ Housing tenure: Renter ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This strategy may not produce units in itself. But it may support development of more affordable units, especially in conjunction with Strategic Action 11.a. - Equitable Outcomes: Allowing parking reductions may benefit affordable housing developments that will serve a percentage of tenants that do not own cars, such as seniors in some cases. ▪ Potential Risk: Reducing off-street parking requirements may

	<p>cause concern for existing residents. For lower-income residents to benefit, this action should be taken in conjunction with development of affordable housing.</p> <ul style="list-style-type: none"> ▪ Magnitude: Moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2022 ▪ Implementation to commence: 2023 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented in the Development Code.
Implementation Steps	<ul style="list-style-type: none"> ▪ Evaluate off-street parking requirements for multifamily housing to identify opportunities for reduction in parking requirements. ▪ Evaluate how potential amendments would affect the type and amount of multifamily housing that would be feasible to build in Tualatin. ▪ Adopt revised parking standards by amending the Development Code.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: Development Community
Funding or Revenue Implications	<p>Amending the City’s Development Code is a comparatively low-cost strategy, primarily relying on the use of staff time.</p>

11.d Evaluate Updating Code to Allow Small Dwelling Unit Developments

Description	Type of Action
<p>Tualatin should evaluate the potential to update its development, municipal, and building codes to allow small-scale units with affordable housing income limits that are not part of HB 2001. This could be accomplished by allowing land division where small lots or parcels are created below the standard lot/parcel size for dwelling units that are limited in size.</p> <p>Tualatin could consider this in the context of new cottage cluster regulations because of the similar development type. This would involve calculating density differently for the dwelling units due to their limited size.</p> <p>For example:</p> <ul style="list-style-type: none"> ▪ Dwelling units 600 square feet or smaller: 0.25 of a dwelling unit. ▪ Dwelling units 601 to 1,200 square feet: 0.50 of a dwelling unit. <p>This strategy may result in housing opportunity for households at 60% of MFI or lower. But this strategic action is not expected to result in income-restricted housing on its own. It is more likely to produce housing affordable at 61% to 100% of MFI.</p>	<p>Adopt Zoning Code Changes</p>

Rationale	Provides greater opportunity for development of housing affordable to low and moderate-income households.
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Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, low-income, and moderate-income households ▪ Income: 100% of MFI or less. ▪ Housing tenure: Renter and owner ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): If this strategy resulted in development of one acre for small dwelling units over the six-year planning horizon, at 10 to 15 units per acre, this strategy could produce between 10 and 15 units of housing. This may represent a pilot of this policy. - Equitable Outcomes: May produce small number of units of housing that could serve lower-income households. ▪ Potential Risk: Allowing smaller units may increase density in existing neighborhoods, with the potential to cause concern for some existing residents.
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	<ul style="list-style-type: none"> ▪ Magnitude: Low
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2024 ▪ Implementation to commence: 2024 or early 2025 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented in the Development Code.
Implementation Steps	<ul style="list-style-type: none"> ▪ Revise Tualatin’s Development Code to allow these smaller units, including revising the density standards. ▪ Pursue a public process (with public hearings) to implement the zone changes.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: Small-scale housing developers and builders, lenders
Funding or Revenue Implications	Amending the City’s Development Code is a comparatively low-cost strategy, primarily relying on the use of staff time.

11.e Evaluate Adopting an Expedited Permitting Process for Affordable Rental Housing and Affordable Homeownership

Description	Type of Action
<p>Evaluate adopting an expedited and/or priority review process for review of development proposed for affordable rental housing at 0-60% of Median Family Income and affordable homeownership at 80% of Median Family Income and below.</p> <p>Such a process could consider projects with direct or indirect funding from local, state, or federal government as essential and projects with long-term affordability covenants through tax abatement or inclusionary requirements as high priority. Assigning a designated staff person to shepherd these projects through the development and construction process in order to expedite them is likely to be essential.</p>	<p>Make Development Process Changes</p>
Rationale	<p>Expedited permitting of both land use applications and building permits would help to reduce costs and financial vulnerabilities of development and construction of affordable housing.</p>
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, low-income, and moderate-income households ▪ Income: 0-80% of Median Family Income ▪ Housing tenure: Renter or Owner ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This action will not directly result in development of more units but may make it easier to develop affordable housing. - Equitable Outcomes: Beneficial to affordable housing development, as it can save on costs and construction time. ▪ Potential Risk: This strategic action may allow less time for comment on affordable housing development. Expediting permitting processes for affordable housing may result in minor increases in the time needed for the permitting processes of other development. ▪ Magnitude: Low to moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: June 30, 2023 ▪ Implementation to commence: 2023 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented in the Development Code

Implementation Steps	<ul style="list-style-type: none"> ▪ Plan and carry out public engagement to get input on changes in the permitting system. ▪ Pursue public decision-making process to make the changes to the permitting system.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Community Development Department ▪ Partners: Local and Regional Development Community
Funding or Revenue Implications	<p>Amending the City’s permitting process is a comparatively low-cost strategy, primarily relying on the use of staff time.</p>

11.f Evaluate Providing Additional Engagement and Information to Developers of Affordable Housing

Description	Type of Action
<p>The City could evaluate the establishment of a formalized information source (i.e., an FAQ) or additional engagement opportunities specific to developers of affordable housing. The City informally provides information to small, local developers to help them understand land use permitting processes and to give developers a sense of clarity and certainty about the requirements so they can better provide smaller-scale housing at an affordable level.</p> <p>The City could create a formal process to provide this information to include all housing developers, especially aimed at those that can produce housing affordable at 80% of Median Family Income and below. The City could promote development of this housing through a City program with a variety of venues such as a developers' roundtable hosted by the Mayor, informational sessions with developers, promotion of incentives and funding resources, and more. These activities are intended to engage, inform, and build relationships with developers to attract them to do business in Tualatin.</p>	<p>Develop Processes and Materials</p>
<p>Rationale</p>	<p>Building relationships with developers, providing quality information to them, and offering incentives and networking opportunities to developers and those in the development community are effective ways to support development in Tualatin.</p>
<p>Anticipated Impact</p>	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income and very low-income households ▪ Income: 0-60% of Median Family Income ▪ Housing tenure: Renter or Owner ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This action is aimed at attracting more affordable and workforce housing developers to Tualatin and may generate a fair amount of interest in housing for households at 0-80% of MFI, resulting in more development that would otherwise not have come here. - Equitable Outcomes: Cultivating relationships with affordable housing and workforce housing developers to develop equitable housing. ▪ Potential Risk: There are likely to be no or minor negative

	<p>impacts.</p> <ul style="list-style-type: none"> ▪ Magnitude: Low to moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: June 30, 2022 ▪ Implementation to commence: 2022 ▪ Time frame of impact: The strategic action can begin to take effect once it is adopted and implemented in the Development Code.
Implementation Steps	<ul style="list-style-type: none"> ▪ Prepare materials and presentations intended to engage, inform, and educate developers about housing development in Tualatin and share what we have to offer in Tualatin. ▪ Meet with developers in a series of lively roundtable events to inform and interest them in Tualatin development opportunities and offer new incentives where possible. Gather feedback from the developers and development community. ▪ Continue to develop relationships with the development community and to update materials and presentations as needed.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: Tualatin Planning Division ▪ Partners: Local and Regional Development Community
Funding or Revenue Implications	<p>Developing materials and presentations for roundtable events about Tualatin’s housing development opportunities and process may be labor intensive for staff.</p>

Goal 12. Transportation and Public Infrastructure: Plan for and develop transportation and public infrastructure to support affordable housing, workforce housing, mixed-use housing, and mixed-income housing.

We recommend that the City pursue the following goal, which supports the existing Policy 3.1.5, Policy 3.1.6, Policy 3.1.7, and Goal 3.5 in the Comprehensive Plan:

- Plan for and develop transportation and public infrastructure to support affordable housing, workforce housing, and mixed-use housing.

The strategic action to evaluate and potentially implement this goal is described below. The City may choose to adopt this goal or the results of the strategic actions into the Comprehensive Plan in the future.

12.a Evaluate Ways to Prioritize Capital Improvements Programming for Affordable and Workforce Housing	
Description	Type of Action
<p>Evaluate ways to prioritize capital improvements programming (CIP) for affordable housing, workforce housing, and mixed-use housing with a component that includes a specified percentage of units for each of these types of housing.</p> <p>The City could coordinate housing planning, CIP planning, and public facilities planning to ensure projects that support development of needed housing types are prioritized. For example, implementing new sewer master plans or new stormwater plans in areas targeted for future housing expansions. This type of coordinated planning could make it easier to understand infrastructure costs. It would also enable the City and developers to plan for more development capacity in areas ripe for higher-density housing.</p>	<p>Improve CIP Planning Processes</p>
Rationale	<p>The City could prioritize work in a CIP and public facilities planning so that projects that support development of needed housing can be constructed sooner.</p>
Anticipated Impact	<ul style="list-style-type: none"> ▪ Populations served: Extremely low income, very low-income, and low-income households ▪ Income: 0-80% of Median Family Income ▪ Housing tenure: Renter or Owner ▪ Potential Benefit: <ul style="list-style-type: none"> - Housing Production (new units): This strategy alone will not result in additional units, but it will improve coordination and

	<p>commitment to production of housing.</p> <ul style="list-style-type: none"> - Equitable Outcomes: Prioritizing capital improvements programming (CIP) for affordable housing, workforce housing, and mixed-use housing supports equitable housing development. ▪ Potential Risk: Funds spent on needed affordable, workforce, and mixed-used housing will be unavailable for other city infrastructure priorities. However, coordinated planning could result in a more integrated and efficient approach to planning for needed housing and infrastructure. ▪ Magnitude: Moderate
Timeline	<ul style="list-style-type: none"> ▪ Timeline for adoption: December 31, 2023 ▪ Implementation to commence: 2024 ▪ Time frame of impact: The strategic action will begin to have impact with changes to funding of infrastructure to support affordable housing.
Implementation Steps	<ul style="list-style-type: none"> ▪ Identify priority areas for infrastructure investment. ▪ Determine the types of infrastructure funding needs (specific projects and costs) in priority areas. ▪ Update the City’s CIP and respective public facility plans by listing needed infrastructure projects in these documents and establishing an implementation schedule for these projects.
Lead Agency and Potential Partners	<ul style="list-style-type: none"> ▪ Lead Agency: City of Tualatin Planning Division ▪ Partners: City of Tualatin Public Works Department
Funding or Revenue Implications	<p>Coordinated infrastructure planning is a comparatively low-cost strategy, primarily relying on the use of staff time.</p>

4. Evaluation: Achieving Fair and Equitable Housing Outcomes

This chapter presents an evaluation of the goals and strategic actions for achieving fair and equitable housing outcomes. It also includes a discussion of monitoring the outcomes of Tualatin's HPS.

Evaluation of the Goals and Strategic Actions

OAR 660-008 requires an evaluation of all the HPS for achieving the following types of outcomes. The discussion below provides a brief evaluation of each of the expected outcomes for the goals and strategic actions of the HPS, with a focus on housing opportunities for federal and state protected classes.³⁶ This is not intended to be an exhaustive evaluation of how each strategic action addresses these outcomes but a high-level overview of the HPS as a whole.

- **Affordable Homeownership.** This criteria focuses on strategic actions that support production of housing affordable for homeownership and includes actions to support development of housing affordable at less than 120% of MFI. Many of the strategic actions in the HPS support development of affordable housing for homeownership through partnerships, fair housing, rehabilitation programs, removing regulatory barriers to development of affordable ownership housing, and capital improvements necessary to support affordable ownership housing. Some of the strategic actions within the HPS that support affordable homeownership include:
 - The strategic actions in Goal 2 are focused on production of affordable housing for homeownership. These strategic actions are intended to work together to identify and remove barriers to homeownership, provide education to residents of Tualatin about homeownership, make regulatory changes that make it easier to develop affordable housing for homeownership, and partner with organizations that build affordable ownership housing.
 - The strategic actions in Goal 5 focus on increasing equity in the City's housing policies. Strategic Action 5.a focuses on identifying funding sources to support the actions within the HPS, including those that support development of affordable ownership housing. Other strategic actions in Goal 5 support Fair Housing goals, which includes development of affordable ownership housing.
 - Strategic Action 8.b supports rehabilitation of single-family housing, which includes ownership housing for households with income below 80% of MFI. Rehabilitation

³⁶ Federal protected classes are: race, color, national origin, gender, familial status, and disability. Oregon's additional protected classes are: marital status, source of income, sexual orientation, and status as a domestic violence survivor. Under Fair Housing laws, it is illegal to deny access to housing in based on the characteristics of people within these protected classes.

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- may be necessary to improve housing conditions to allow people to continue to live in their housing.
- Goal 11 includes proposals for regulatory and zoning changes that support development of affordable ownership housing. These changes include allowing for development of small dwelling units, expediting permitting processes for affordable homeownership, and providing additional information to developers of affordable housing to make development in Tualatin easier.
 - Strategic Action 12.a is intended to prioritize capital improvements for affordable housing, including ownership housing. Without infrastructure (such as roads, sewer, or water), vacant land cannot be developed for affordable ownership housing at the densities envisioned in the *Tualatin Housing Needs Analysis*.
 - **Affordable Rental Housing.** Supporting affordable rental housing includes actions to support production of both income-restricted affordable housing (affordable to households with incomes below 60% of MFI) and privately developed affordable housing (affordable for households with incomes between 61% and 80% of MFI). Strategic actions within the HPS that support affordable rental housing development include:
 - The strategic actions in Goal 1 are focused on production of income-restricted affordable rental housing, with the exception of Strategic Action 1.d, which also includes workforce affordable housing. These strategic actions work together to support production of income-restricted affordable housing through proposal of actions that may reduce development or operational costs (property tax exemptions, changes to systems development charge changes, and identification of public or institutional land at low or no cost), increase funds available to support development of income-restricted affordable housing (a Construction Excise Tax, use of Urban Renewal, and identification of other sources of funding), and potential regulatory changes.
 - The strategic actions in Goals 3 and 4 are focused on preservation of existing affordable housing, both income-restricted and naturally occurring affordable housing.
 - The strategic actions in Goal 5 focus on increasing equity in the City's housing policies. Strategic Action 5.a focuses on identifying funding sources to support the actions within the HPS, including those that support development of affordable rental housing. Other strategic actions in Goal 5 support Fair Housing goals, which includes development of affordable rental housing.
 - The strategic actions in Goal 6 support development of workforce housing, which includes affordable rental housing.
 - Goal 7 supports housing stabilization, which includes strategic actions to provide rental and utility assistance.

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- Strategic actions within Goal 10 support mixed-use development and redevelopment, with a focus on development of affordable housing. Given the small amount of vacant land for multifamily development in Tualatin, developing rental housing will require development of mixed-use housing and redevelopment.
 - Goal 11 includes proposals for regulatory and zoning changes that support development of affordable rental housing. These changes include allowing for increases in the development of higher-density multifamily housing, upzoning of lower-density land to higher-density zones to increase the amount of land where multifamily housing can be built, potential targeted reductions of off-street parking requirements, expediting permitting processes for affordable rental housing, and providing additional information to developers of affordable housing to make development in Tualatin easier.
 - Strategic Action 12.a is intended to prioritize capital improvements for affordable housing, including ownership housing. Without infrastructure (such as roads, sewer, or water), vacant land cannot be developed for affordable rental housing at the densities envisioned in the *Tualatin Housing Needs Analysis*.
 - **Housing Stability.** Increasing housing stability includes actions that increase the stability of existing households and preventing displacement by mitigating gentrification resulting from public investments or redevelopment. Strategic actions within the HPS that address housing stability include:
 - Part of increasing housing stability will be preservation of existing housing, rehabilitation of housing, and development of more affordable ownership and rental housing. These items are discussed above.
 - Goal 7 supports housing stabilization, which includes strategic actions to provide rental and utility assistance and identifying housing options and services to address and prevent homelessness.
 - The descriptions of strategic actions under Goal 10 discuss the potential for displacement of existing residents through redevelopment. Through redevelopment planning, the City will need to be careful to avoid displacing existing residents through redevelopment. Urban Renewal District 2 has a mix of uses, including apartment buildings, commercial buildings, and public buildings. As the City plans for redevelopment here, the City will need to take care not to displace existing residents.
 - **Housing Options for People Experiencing Homelessness.** Increasing options for people experiencing homelessness includes working with partners and identifying ways to address homelessness and strategic actions that reduce the risk of households becoming homeless (especially for households with income below 30% of MFI). Strategic actions within the HPS that provide options for people experiencing homelessness include:

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- Part of providing options for people experiencing homelessness is development of income-restricted affordable housing, which is the focus of Goal 1 (as described above). The strategic actions in Goal 1 are also intended to provide affordable housing options for people at risk of becoming homeless, such as households with incomes below 30% of MFI.
 - Strategic Action 7.b is to evaluate development of options for provision of housing and services necessary to address and prevent homelessness.
 - **Housing Choice.** Increasing housing choice involves increasing access to housing for communities of color, low-income communities, people with disabilities, and other state and federal protected classes. Increasing housing choice also means increasing access to existing or new housing that is located in neighborhoods with healthy, safe environments and high-quality community amenities, schooling, and employment and business opportunities. Strategic actions within the HPS that increase housing choice include:
 - Increasing housing choice for state and federal protected classes involves preservation of existing housing, rehabilitation of housing, and development of more affordable ownership and rental housing. These items are discussed above.
 - The regulatory changes proposed in Goal 11 also support increases in housing choice for state and federal protected classes through supporting development of additional housing, which may be located in high-opportunity neighborhoods.
 - Strategic Action 5.d addresses housing choice directly through an evaluation of strategies to encourage development of diverse housing types in high-opportunity neighborhoods.
 - Strategic Actions 5.b and 5.c address Fair Housing issues, with the intention of increasing housing choice for state and federal protected classes.
 - **Location of Housing.** Diversifying the location of housing requires increasing options for residential development that is compact, in mixed-use neighborhoods, and available to people within state and federal protected classes. This measure is intended, in part, to meet statewide greenhouse gas emission reduction goals. Strategic actions within the HPS that support development of compact, mixed-use neighborhoods include:
 - Goal 10 proposes strategic actions that increase options for development of compact housing in mixed-use neighborhoods. The strategic actions include evaluating opportunities for redevelopment and creation of mixed-use districts, conversion of unused commercial buildings to residential uses, evaluating land to rezone for mixed-use development, and a tax exemption to support mixed-use development.
 - Strategic actions in Goal 11 support diversifying the location of housing through evaluation of actions that increase multifamily development densities, upzone lower-density land, target reductions of off-street parking requirements, and allow smaller dwelling unit development.

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- **Fair Housing.** Supporting Fair Housing is accomplished by increasing access to housing for people part of state and federal protected classes, affirmatively furthering fair housing, addressing disparities on access to housing opportunity for underserved communities, and decreasing patterns of segregations or concentrations of poverty. Strategic actions within the HPS that further Fair Housing goals include:
 - Production of affordable rental and homeownership housing, increasing housing stability, identifying housing options for people experiencing homelessness, and increasing housing choice are all part of supporting Fair Housing. These issues are addressed above.
 - The strategic actions in Goal 5 focus on increasing equity in the City’s housing policies and Fair Housing. Strategic Action 5.a focuses on identifying funding sources to support the actions within the HPS. Strategic Actions 5.b and 5.c address Fair Housing issues, with the intention of increasing housing choice for state and federal protected classes. Strategic Action 5.d addresses housing choice directly through an evaluation of strategies to encourage development of diverse housing types in high-opportunity neighborhoods.

Taken together, the goals and strategic actions included in Tualatin’s Housing Production Strategy are intended to work together to achieve equitable outcomes for all residents of Tualatin, with an emphasis on improving outcomes for historically underserved communities, households with lower income, and people in state and federal protected classes.

Monitoring Outcomes of the HPS

This is Tualatin’s first HPS. As a result, the City is required to describe how it will measure the implementation and progress of the HPS. This section focuses on these issues.

Tualatin is required to report progress on implementation of the HPS to DLCD every three years.³⁷ This report must include:

- **A summary of the actions taken to implement the HPS.** There may be strategic actions that the City has not implemented on the schedule for the first three years of the HPS (i.e., actions expected to be adopted by December 31, 2024). If so, the City needs to provide an explanation of the barriers to implementation and a plan for addressing the need that the strategic action was intended to address. That plan could include identification of other strategic actions in the HPS that will meet the identified need, or it could include development of a new strategic action to meet the need.
- **A reflection of the efficacy of the strategic actions the City has implemented.** This reflection should discuss the outcomes the City is observing from the strategic actions they have implemented to date and could include expectations for future outcomes.

³⁷ This report is due to DLCD no later than December 31 three years after Tualatin adopts its HPS.

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- **A reflection of the efficacy of the strategic actions in the context of the outcomes described above.** The section evaluates the goals and strategic actions in the HPS for expected outcomes such as increasing housing options for affordable homeownership, affordable rental housing, housing stability, housing options for people experiencing homelessness, housing choice, location of housing, and fair housing. The report should describe whether the goals and strategic actions implemented have resulted in the outcomes described above.

In addition, Tualatin is required to report about strategic actions that will not be adopted on the schedule presented in Exhibit 6. The City must notify DLCD that it will be unable to adopt the strategic action within 90 days of the end of the timeline to implement the strategic action. This notice must identify the actions or combinations of actions that the City will take to address the need that the strategic action was intended to address. This could include identification of other strategic actions in the HPS that will meet the identified need, or it could include development of a new strategic action to meet the need.

Tualatin proposes to monitor the impact of the HPS through the following measures. Tualatin staff will conduct a briefing to City Council every two years to discuss implementation of the HPS and the outcomes resulting from the strategic actions in the HPS.

- Number of new regulated affordable units built in Tualatin
- Loss of existing regulated affordable housing units
- Number of regulated affordable housing units that Tualatin contributed funding to, including the sources of funding or tax exemption
- Number of nonregulated affordable housing units that Tualatin contributed funding to, including the sources of funding or tax exemption
- Types of new units built
 - The types should at least include single-family detached, single-family attached, duplexes, triplexes, quadplexes, and multifamily with five or more units.
 - The types could be further disaggregated to include cottage housing, manufactured housing, accessory dwelling units, duplexes, triplexes, quadplexes, residential multifamily with five or more units, and mixed-use multifamily with five or more units.
- Densities of new units built by housing type and zone, considering the difference between the maximum allowed density and the built density
- Location of new units built
- Regulatory changes to allowable density by zone
- Code amendments that are made to remove barriers to development of housing

-
- Partnerships formed as a result of the HPS, including number of people served by the partnerships
 - Changes in the characteristics of Tualatin’s population, such as changes in:³⁸
 - Median household income
 - Percent of population in communities of color
 - Percent of renters
 - Percent of renter households cost burdened and severely cost burdened
 - Percent of owner households cost burdened and severely cost burdened
 - Changes in housing prices, such as:
 - Changes in median rent³⁹
 - Changes in median sales price⁴⁰

When Tualatin produces its next HPS in six years, the City will be required to summarize the efficacy of each strategic action included in this HPS. The information resulting from these measures will help Tualatin to summarize the outcomes and efficacy of the strategic actions in this HPS.

³⁸ The best source of data for these indicators is the US Census’ American Community Survey Five-Year Estimate. These estimates naturally have some variation year over year and that variation may not indicate an actual change. The City should look at the change in these indicators over a period of at least 3 years or longer.

³⁹ The best existing source of data for rent is the US Census’ American Community Survey Five-Year Estimate. The City should look at the change in these indicators over a period of at least 3 years or longer. The City may also want to discuss change in rents with knowledgeable stakeholders to get current information about rents.

⁴⁰ The US Census’ American Community Survey Five-Year Estimate provides data about home values, but that data is not as reliable as other data about home sales. The City may be able to collect data about home sales from a source like Redfin or Zillow. Alternatively, the City may be able to work with a real estate professional who is able to provide median sales price data periodically.

Appendix A: Contextualizing Tualatin’s Housing Needs

In 2019, Tualatin completed its Housing Needs Analysis for the 2020-2040 period.⁴¹ The analysis found that Tualatin could not accommodate all of its housing needs on lands designated for residential use. Tualatin had a deficit of land in the Medium High Density and High-Density High-Rise Plan Designations, of seven acres (or 109 dwelling units) and four acres (or 101 dwelling units), respectively. The analysis also found that Tualatin had an unmet need for housing for extremely low income, very low-income, low-income, and moderate-income households—indicating a need for a wider range of housing types for renters and homeowners.

To build on Tualatin’s recent planning efforts, including development of the Housing Needs Analysis, the City applied for a grant with the Department of Land Conservation and Development in 2020 to produce a prototype Housing Production Strategy. The Housing Production Strategy will craft policy measures and actions to address Tualatin’s housing needs, meet the City’s housing goals, and effect positive change in the community.

To contextualize Tualatin’s housing needs, this memorandum summarizes relevant data from Tualatin’s Housing Needs Analysis, Statewide Regional Housing Needs Analysis,⁴² the Washington County Consolidated Plan,⁴³ and other available sources to describe current and future housing needs in the context of population and market trends in Tualatin. Where appropriate, this memorandum also draws on information gathered through engagement with housing producers and consumers, including underrepresented communities, through recent outreach efforts conducted by the City of Tualatin.

As a part of providing context to better understand Tualatin’s housing needs, this memorandum presents information about housing in Tualatin for race, ethnicity, age, disability status, and other characteristics of the community to understand disproportionate housing impacts on different groups.

Data Used in This Analysis

Throughout this analysis, data from multiple well-recognized and reliable data sources were used. One of the key sources for housing and household data is the US Census. This report primarily uses data from two Census sources:⁴⁴

⁴¹ ECONorthwest. (December 2019). City of Tualatin Housing Needs Analysis, Final Report.

⁴² ECONorthwest. (August 2020). Implementing a Regional Housing Needs Analysis Methodology in Oregon: Approach, Results, and Initial Recommendations.

⁴³ Root Policy Research. (May 15, 2020). Washington County – Beaverton – Hillsboro 2020-2024 Consolidated Plan.

⁴⁴ It is worth commenting on the methods used for the American Community Survey. The American Community Survey (ACS) is a national survey that uses continuous measurement methods. It uses a sample of about 3.54 million

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- The **Decennial Census**, which is completed every ten years and is a survey of *all* households in the United States. The Decennial Census is considered the best available data for information such as demographics (e.g., number of people, age distribution, or ethnic or racial composition), household characteristics (e.g., household size and composition), and housing occupancy characteristics. As of 2010, the Decennial Census does not collect more detailed household information, such as income, housing costs, housing characteristics, and other important household information. Decennial Census data is available for 2000 and 2010.
 - The **American Community Survey (ACS)**, which is completed every year and is a *sample* of households in the United States. The ACS collects detailed information about households, including demographics (e.g., number of people, age distribution, ethnic or racial composition, country of origin, language spoken at home, and educational attainment), household characteristics (e.g., household size and composition), housing characteristics (e.g., type of housing unit, year unit built, or number of bedrooms), housing costs (e.g., rent, mortgage, utility, and insurance), housing value, income, and other characteristics.

This report uses data from the 2013-2017 ACS for Tualatin and comparison areas primarily. Where information is available and relevant, we report information from the 2000 and 2010 Decennial Census. Among other data points noted throughout this analysis, this report also includes data from Oregon’s Housing and Community Services Department, the United States Department of Housing and Urban Development, RLIS, Redfin, Costar, the City of Tualatin, and the Washington County Consortia 2020-2024 Consolidated Plan.

households to produce annually updated estimates for the same small areas (census tracts and block groups) formerly surveyed via the Decennial Census long-form sample. It is also important to keep in mind that all ACS data are estimates that are subject to sample variability. This variability is referred to as “sampling error” and is expressed as a band or “margin of error” (MOE) around the estimate.

This report uses Census and ACS data because, despite the inherent methodological limits, they represent the most thorough and accurate data available to assess housing needs. We consider these limitations in making interpretations of the data and have strived not to draw conclusions beyond the quality of the data.

Existing Measures, Policies, or Strategies that Address Tualatin's Housing Needs

This City of Tualatin has the following housing measures (or policies or strategies) currently in place to address Tualatin's housing needs. These measures include:

- Prohibited single-family detached housing in most high-density zones in Tualatin.
- Allowed one or more accessory dwelling units (ADUs) in residential zones per lot.⁴⁵
- Applied density standards uniformly across zones that allow dwelling units on fee simple lots and on multifamily sites.
- Ensured decisions about type and location of housing are data-driven and focused on equitable outcomes instead of the best outcomes for those with the most money and/or privilege.
- Removed open space/common amenity requirements for low-density residential.
- Provided information to small, local developers to help them understand land use permitting processes and to give developers a sense of clarity and certainty about the requirements so they can better provide smaller-scale housing.

Tualatin's existing measures generally focus on land use efficiency (such as allowing development of denser housing types) or measures to reduce development costs (such as removing open space requirements for some housing development). By and large, the types of policies that Tualatin has yet to adopt include policies to support:

- Development of affordable rental housing for households with incomes at or below 60% of Median Family Income (MFI).
- Preservation of affordable housing stock to prevent loss of affordable housing units and displacement of existing residents.
- Development and preservation of affordable housing for homeownership, including rehabilitation of existing housing.
- Expansion of workforce owner and rental housing to increase the jobs-housing balance.
- Increased racial and social equity for housing.
- Prevention and reduction of homelessness.
- Expansion of accessible housing and housing for people with special needs.
- Planning for mixed-use housing and redevelopment.
- Greater availability of diverse housing types through regulatory or zoning changes, including mixed-use housing and redevelopment in commercial areas.

⁴⁵ Tualatin's ADU provisions are not yet compliant in regard to HB 2001 off-street parking requirements.

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- Planning for and developing transportation and public infrastructure to support affordable housing, workforce housing, and mixed-use housing development.

Summary of Tualatin's Housing Needs

Tualatin's primary housing needs, as described in the remainder of this memorandum, are:

- **Greater housing affordability and availability for renters.** Based on a survey of currently available rental properties in Tualatin, the typical asking rent for a two-bedroom apartment ranged from \$1,125 for a one-bedroom unit to more than \$2,000 per month for a three-bedroom unit. These costs are affordable to households earning 55% to 98% of the region's MFI (about \$45,000 to \$80,000). Competition for affordable units is strong and many cannot afford these rents without cost burdening themselves. In the 2013-2017 period, about 56% of Tualatin's renters were cost burdened, with 26% severely cost burdened.⁴⁶ Renters, especially those with lower incomes, are at risk of being displaced through increases in rental costs.
- **Greater housing affordability and availability for renters.** Based on a survey of currently available rental properties in Tualatin, the typical asking rent for a two-bedroom apartment was about \$1,125 to more than \$2,000 per month. These costs are affordable to households earning 55% to 98% of the region's MFI (about \$45,000 to \$80,000). Competition for affordable units is strong and many cannot afford these rents without cost burdening themselves. In the 2013-2017 period, about 56% of Tualatin's renters were cost burdened or severely cost burdened.
- **Housing diversity.** Tualatin is a relatively young and ethnically diverse city. While Tualatin comprises many families with and without children, the senior population across the region is growing. Tualatin serves as an important employment hub in the Portland Metro area, drawing workers from across the region. These characteristics suggest a need for a wide variety of housing types to meet the needs of a growing and diverse pool of existing and future residents.
- **Government-subsidized, emergency, and supportive housing.** Tualatin has about 604 rent-restricted affordable housing units (accounting for about 5% of Tualatin's housing stock), despite having about 1,753 households experiencing severe housing cost burden in the city. Tualatin's Continuum of Care region has 111 emergency shelter beds, 10 safe haven beds, 119 transitional shelter beds, and 725 permanently supportive housing beds supporting persons experiencing homelessness in the region. However, in 2019, 44% of people experiencing homelessness in the region were unsheltered and about 211

⁴⁶ A household is said to be cost burdened if they spend 30% or more of their gross income on housing costs. A household is said to be severely cost burdened if they spend 50% or more of their gross income on housing costs.

students in the Tualatin/Tigard School District experienced homelessness in some form in the 2018-19 school year (many of them doubled-up⁴⁷).

Throughout this analysis, we discuss housing needs for specific populations, such as people of color. The reason for this discussion is that the housing needs of these populations are different from other groups in Tualatin. The Washington County Consolidated Plan describes the issue in the following way:

“Analyses persistently demonstrate that some population groups, including communities of color and people with disabilities, experience disproportionately high housing cost burdens, are less likely to be homeowners, are disproportionately represented in the criminal justice system, have a school achievement gap and experience other disparities relative to health, wellbeing, wealth, income and life outcomes. In deciding on priorities, the County sought opportunities to address persistent historic imbalances, consider systemic causes and advance a more equitable and fair housing system.”⁴⁸

This analysis finds disproportionate housing needs in Tualatin for seniors, people of color, people with one or more disabilities, and people experiencing homelessness.

- **Seniors.** People 65 years of age and older tend to be disproportionately cost burdened compared to the average household—many living on fixed incomes in a region with increasingly growing housing costs.⁴⁹ About 62% of people aged 65 years of age and older are rent burdened in the Portland Region. Over the next twenty years, people over 65 years are expected to be the fastest-growing age group. As this group grows, Tualatin will need more housing that is affordable, physically accessible, and has needed services. Seniors will also need improved access to housing without discrimination, especially seniors who are also people of color.
- **People of Color.** About 55% of renter households that identified as Latino and 52% of renter households that identified as a non-Asian person of color were cost burdened in the Portland Region.⁵⁰ Latino is the largest ethnic or racial group in Tualatin (16% of the population) and has the lowest median income (\$30,761) of any race or ethnicity in Tualatin. Broadly, the housing needs for many people of color in Tualatin include improved access to affordable units, access to housing in locations with “high

⁴⁷ “Doubled-up” refers to the sharing of other persons’ housing due to loss of housing or economic hardship.

⁴⁸ 2020-2024 Consolidated Plan for Washington County and the Cities of Beaverton and Hillsboro, Executive Summary, page 3.

⁴⁹ Some seniors have accumulated wealth, which is not accounted for in this analysis. Information about accumulated wealth is available at the national level but not at the state or city level.

⁵⁰ This information is not available on a city-by-city basis from the US Census ACS. This statistic is pulled from a statewide analysis from the report *Implementing a Regional Housing Needs Analysis Methodology in Oregon: Approach, Results, and Initial Recommendations* by ECONorthwest, August 2020.

opportunity” (such as areas near jobs, transit, services, or high-quality education), and access to housing without discrimination.

- **People with disabilities.** Across the Portland Region, people with one or more disabilities experience disproportionate cost burden. In particular, 53% of renters in the Portland Region with a hearing or vision disability and 65% of renters with a disability other than a hearing or vision-based disability are cost burdened, compared to the average rate of cost burden for all households in the region at 46%. Housing needs of people with disabilities vary by type of disability, but in general, housing needs include a need for improved access to an affordable unit, improved physical access to housing units, access to housing with needed services, and access to housing without discrimination, especially for people with disabilities who are also people of color.
- **People experiencing homelessness.** People experiencing homelessness are disproportionately affected by lack of affordable housing. Three hundred seven people were identified as homeless and unsheltered in Washington County and 44 people were identified in the Tigard/Tualatin area in 2020. Housing needs for people experiencing homelessness vary by reason for homelessness. In Washington County, the primary reason people cited for experiencing homelessness was inability to afford housing. The broad housing needs for this group include needs for emergency assistance (including rent support), permanent supportive housing (including with supportive housing with services), and improved access to an affordable unit.

In addition to these needs, findings from public and stakeholder outreach helped to identify the following specific housing needs, as described later in this memorandum:

- ADA-accessible housing units and housing units developed with universal design components such as basic accessibility features; security or communication systems; easily traversed floors; remote control features; accessible lavatories, sinks, and counters; accessible bathtubs and showers; variable height counters and accessible work surfaces; and hearing and visual impairment aids.
- Wider range of housing types, such as more town homes and row houses, mixed-use development, duplexes, triplexes, cottage clusters, multigenerational housing, accessory dwelling units, and high-rise apartments (structures that are six to eight stories in height).
- Housing in mixed-use neighborhoods with access to transit, jobs, green space, and entertainment.
- Support for seniors to age in place.
- Housing options for households earning \$50,000 or less.
- Higher-quality housing.

-
- Access to housing without discrimination.⁵¹

Discussions with stakeholders provided input on existing and expected barriers to development of needed housing, includes:

- High cost of land due to limited availability of sites (including larger sizes) that can accommodate new development.
- Increasingly high construction costs and competition for materials and labor.
- Zoning and development constraints, including lot size, height, density, and parking limitations/requirements.
- Competition for national or state grants and loans to subsidize affordable housing development.
- Developer willingness and financial ability to produce “needed” housing.

Overview of Housing Needs in Washington County

The Washington County Consolidated Plan for 2020 to 2024 presents additional information to provide context for Tualatin’s housing needs. The groups with special housing needs in Washington County are elderly households, households with disabilities, and households with mental illness and/or substance abuse disorders. The section below presents a summary of the housing need for people in these groups. More information is available in Appendix D of the Washington County Consolidated Plan report.

- **Elderly and frail elderly.** In Washington County, between 8,000 and 20,000 elderly and frail elderly have unaddressed housing needs out of 95,000 individuals in 56,960 households that have at least one person 62 or older. About 21,000 households (38%) have a housing and supportive service need, and 25,000 households earn less than 80% of MFI and are very low income (an increase from the last Consolidated Plan). About 6,000 households in this group are extremely low income, earning less than 30% MFI. The primary concern of seniors who own their own home or live in market-rate rental housing is managing rising costs on fixed incomes. Affordable housing wait lists for seniors may be longer than their life expectancy, especially if they need a ground-floor unit. Moderate income seniors have no options for help. Lack of access to transportation is also a significant challenge for most seniors.
- **Persons with disabilities.** In Washington County, there are 57,605 households that have an individual with a self-care limitation, independent living limitation, and/or physical disability, representing 26% of households in the entire County. Another 18,200

⁵¹ Issues around housing discrimination were additionally identified through the help of focus groups during production of the Washington County Consolidated Plan: Washington County, Beaverton, Hillsboro. (August 2020). *2020-2024 Consolidated Plan for Washington County and the Cities of Beaverton and Hillsboro*, Volume 1.

households have an individual with a cognitive limitation, representing 8% of households in the entire County.

- **Persons with mental illness and/or substance abuse disorders.** In Washington County, many as 40,000 have unaddressed substance abuse in need of treatment. According to the state data base on affordable housing, there are only three developments in Washington County that serve persons with substance abuse; these have a total of 84 beds.
- **Survivors of domestic violence.** In Washington County, there are an estimated 500 to 1000 housing units or supports needed.⁵²

Some of the housing priorities in the Washington County Consolidated Plan include:

- Priorities for housing, including:
 - Increase the inventory of deeply affordable rental housing in good condition
 - Increase the inventory of accessible and visitable housing to serve elderly persons and those with disabilities
 - Improve the quality of affordable ownership housing in good condition and with accessibility features
 - Improve access to ownership for low to moderate income households through home buyer assistance programs/products and by helping increase the affordable ownership inventory
- Special needs priorities for elderly and frail; persons with disabilities; persons with mental illness and substance abuse challenges (includes those who are justice involved); adults and youth at risk and experiencing homelessness (including youth leaving the foster system); large families; agricultural workers; extremely low and very low-income households
- Neighborhood and community development priorities to expand transit to better serve persons with disabilities, elderly persons, and those without a car; expand the inventory of facilities servicing people experiencing homelessness; support household stabilization and displacement mitigation; and invest in public infrastructure and facilities that stabilize communities and support a variety of community needs and cultures.
- Public service priorities to fund supportive services and community-serving nonprofits and support educational and outreach activities focused on landlord-tenant and fair housing activities.

⁵² 2020-2024 Consolidated Plan for Washington County and the Cities of Beaverton and Hillsboro, Appendix D.

Demographic and Socioeconomic Characteristics Affecting Tualatin’s Housing Needs

This section describes unmet housing needs in Tualatin by age, race and ethnicity, disability, household size and composition, and household income.

Age of People in Tualatin

Population growth is the primary driver of growth in housing. Between 2000 and 2020, Tualatin’s population grew by about 4,404 people, with most of the growth occurring in the early 2000s. Over that period, Tualatin grew at a slower rate than Washington County and Oregon.

Growth in Tualatin’s senior population, as well as other age cohorts, will continue to shape the city’s housing needs. Seniors account for 16% of Tualatin’s existing population, and Washington County expects to have more than 75,000 more people over 60 years old by 2040 than in 2020.

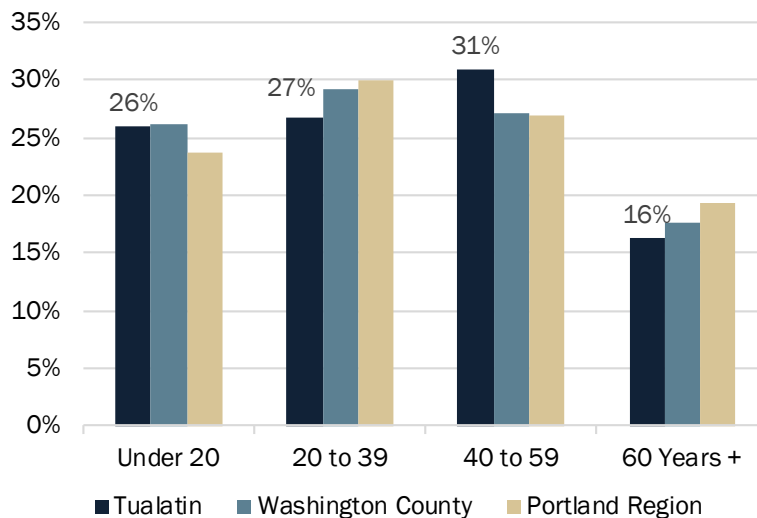
Growth in the number of seniors will result in demand for housing types specific to seniors, such as small and easy-to-maintain dwellings, assisted-living facilities, or age-restricted developments. Senior households will make a variety of housing choices, including remaining in their homes as long as they are able, downsizing to smaller single-family homes (detached and attached) or multifamily units, moving in with family, or moving into group housing (such as assisted-living facilities or nursing homes) as their health declines.

In the 2013-2017 period, about 16% of Tualatin’s residents were over 60 years old.

Tualatin had a slightly smaller share of people over the age of 60 than Washington County and Portland Region.

Exhibit 7. Population Distribution by Age, Tualatin, Washington County, and the Portland Region, 2013-2017

Source: US Census Bureau, 2013-2017 ACS, Table B01001.

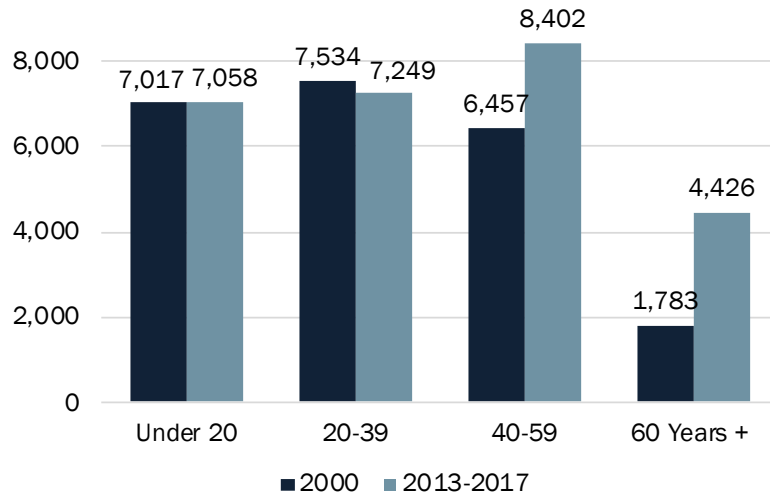


Between 2000 and 2013-2017, people over 60 years old had the largest increase, adding 2,643 people.

Over the next 20 years (2020 to 2040), the population aged 60 and older in Washington County is forecast to grow by 62% (75,217 people).

Exhibit 8. Population Distribution by Age, Tualatin, 2013-2017

Source: US Census Bureau, 2000 Decennial Census Table P012 and 2013-2017 ACS, Table B01001.



Race and Ethnicity

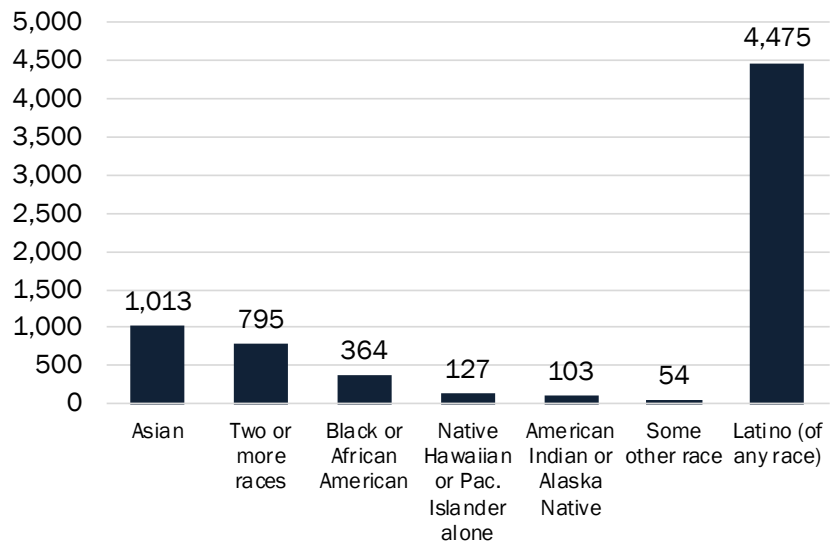
Understanding race and ethnicity characteristics⁵³ in Tualatin is important for understanding housing needs because people of color often face discrimination when looking for housing.

About 2,400 people identify as a race other than white in Tualatin. Nearly 4,500 people identify as Latino.

Not shown in the exhibit are the 23,694 people identifying as white in Tualatin.

Exhibit 9. Population by Race/Ethnicity, Tualatin, 2013-2017

Source: US Census Bureau, 2013-2017 ACS, Table B03002.



⁵³ The US Census Bureau considers race and ethnicity as two distinct concepts. Latino is an ethnicity and not a race, meaning individuals who identify as Latino may be of any race.

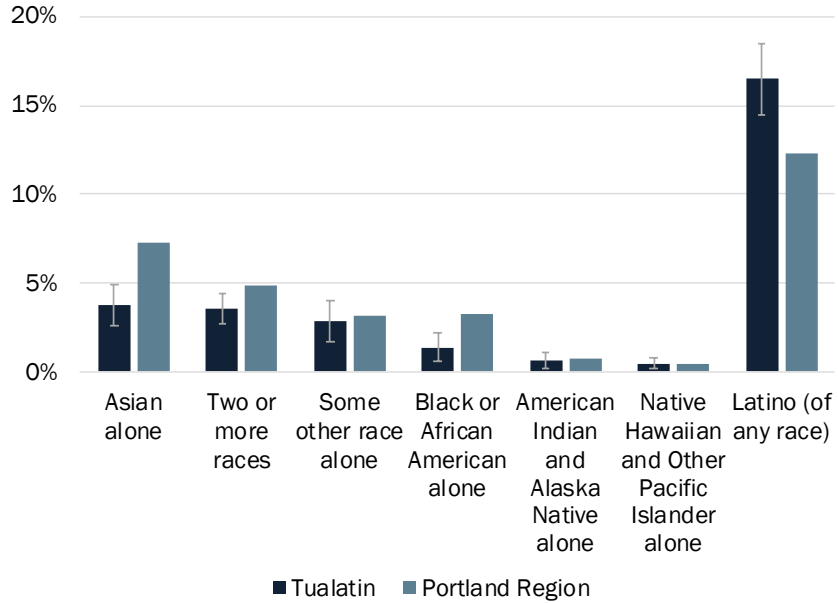
Residents who identify as Latino (of any race) account for 16% of Tualatin's population. The largest racial group in Tualatin is the Asian community, which accounts for 4% of Tualatin's population.

Not shown in this exhibit is about 74% of Tualatin's population and 72% of the Portland Region's population identifying as white.

Exhibit 10. Share of Population by Race and Ethnicity (Percent of Total Population), Tualatin, and the Portland Region, 2013-2017

Source: US Census Bureau, 2013-2017 ACS, Table B03002.

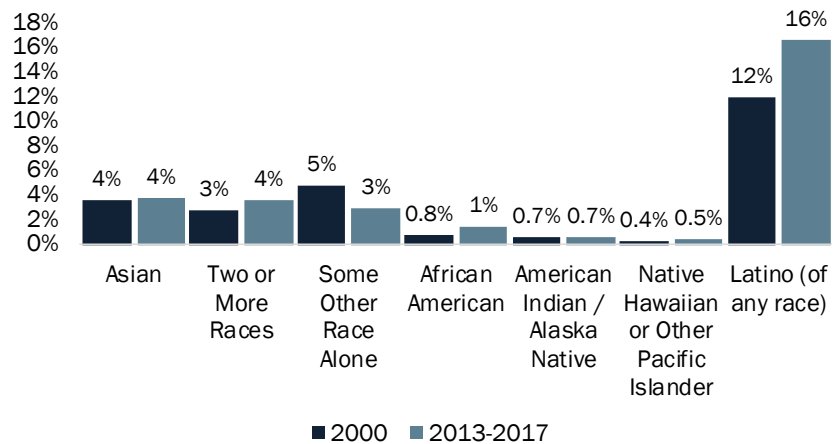
Note: Gray bars denote the potential upper and lower bound of the estimate using the margin of error reported by the Census.



The share of Tualatin's households that identified as Latino (of any race) increased from 2,701 people in 2000 to 4,475 people in 2017, consistent with regional trends.

Exhibit 11. Change in Population by Race/Ethnicity as a Percent of the Total Population, Tualatin, 2000 and 2013-2017

Source: US Census Bureau, 2013-2017 ACS, Table B01001.



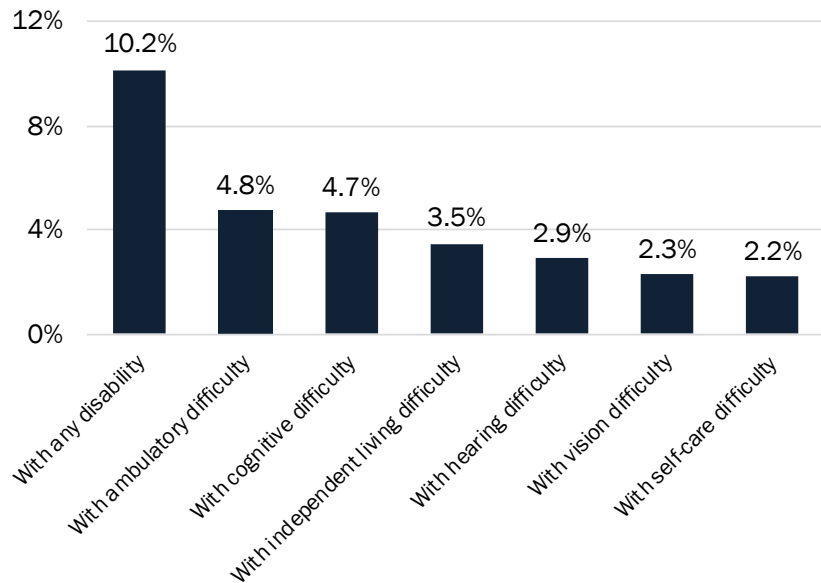
People with One or More Disabilities

People with one or more disabilities have special housing needs because they may need housing that is physically accessible, that meets the needs of people with a cognitive disability, or that has specialized services.

People with disabilities comprise about 10% of Tualatin's population, or 2,800 people.

Exhibit 12. Share of Population with a Disability by Type of Disability, Tualatin, 2013-2017

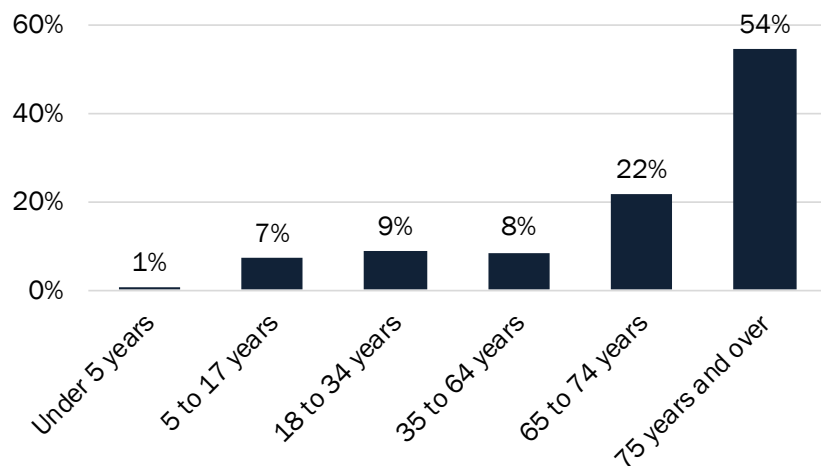
Source: US Census Bureau, 2013-2017 ACS 5-Year Estimate, Table S1810. Note that an individual can have more than one disability.



The likelihood of having a disability increases with age. In Tualatin, over half the population that was 75 years and older had one or more disabilities.

Exhibit 13. Share of Population with a Disability by Age Group, Tualatin, 2013-2017

Source: US Census Bureau, 2013-2017 ACS 5-Year Estimate, Table S1810



Household Size and Composition

Housing need varies by household size and composition. The housing needs of a single-person household are different than those of a multigenerational family. Tualatin's households are smaller than Washington County's households.

Tualatin's average household size was smaller than Washington County's and Clackamas County's, but larger than Multnomah County's.

Exhibit 14. Average Household Size, Tualatin, Washington County, Clackamas County, Multnomah County, 2013-2017

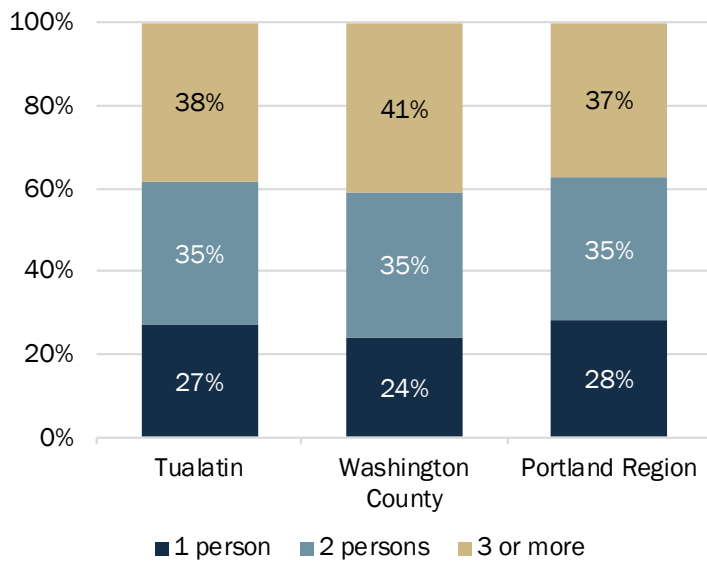
Source: US Census Bureau, 2013-2017 ACS 5-Year Estimate, Table B25010.



About 62% of Tualatin's households were 1 or 2-person households, compared to 59% of Washington County's and 63% of the Portland Region's households.

Exhibit 15. Household Size, Tualatin, Washington County, and Portland Region, 2013-2017

Source: US Census Bureau, 2013-2017 ACS 5-Year Estimate, Table B25010.

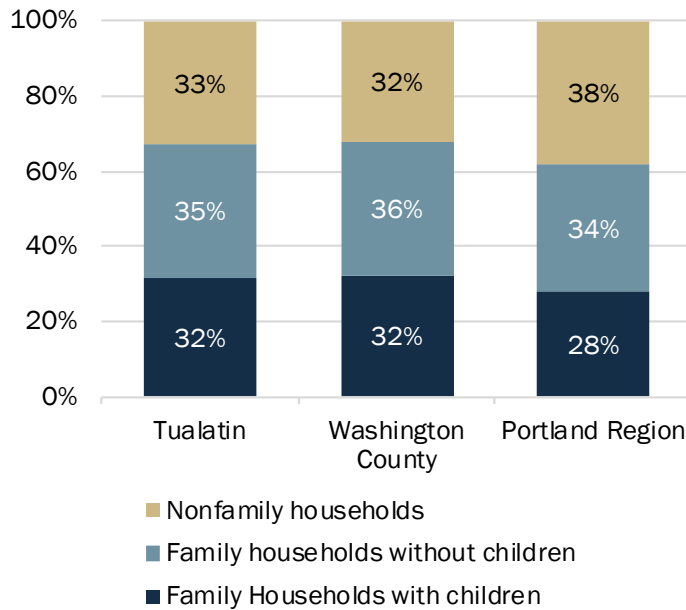


Tualatin had a similar household composition to Washington County. Compared to the Portland Region, Tualatin had a smaller share of nonfamily households and a larger share of family households with children.

About a third of Tualatin's households were nonfamily households (i.e., 1-person households and households composed of roommates).

Exhibit 16. Household Composition, Tualatin, Washington County, and Portland Region, 2013-2017

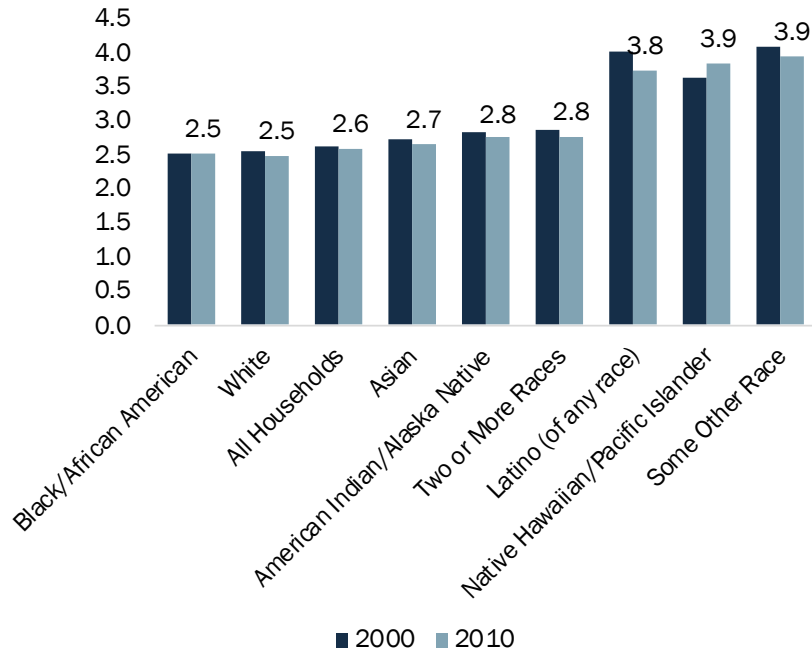
Source: US Census Bureau, 2013-2017 ACS 5-Year Estimate, Table DP02.



Tualatin's households that identified as Black/African American and white had smaller household sizes than other racial or ethnic groups.

Exhibit 17. Historical Average Household Size Trends by Race and Ethnicity, Tualatin, 2000 and 2010

Source: US Census Bureau, 2013-2017 ACS 5-Year Estimate, Table B25010.



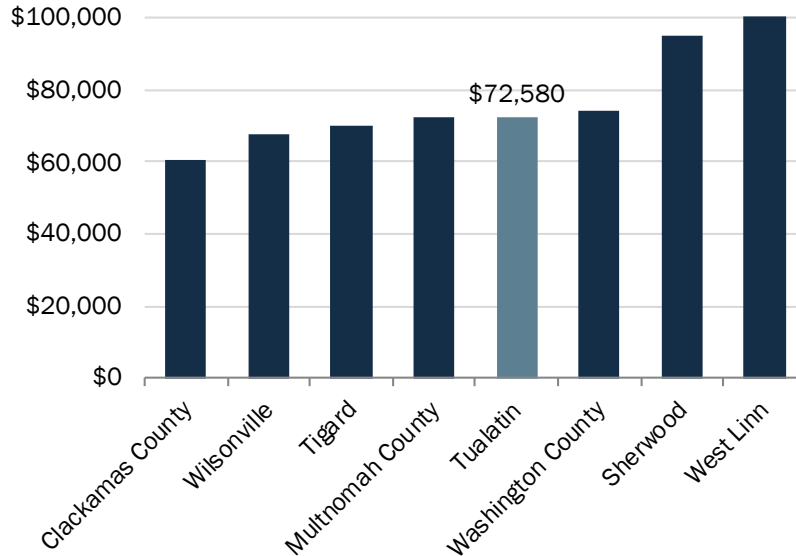
Household Income

Income is one of the key determinants in housing choice and household ability to afford housing. Income for residents living in Tualatin was lower than the Washington County median income and the state’s median income.

Over the 2013-2017 period, Tualatin’s median household income (MHI) was \$1,453 below that of Washington County’s.

Exhibit 18. Median Household Income, Tualatin, Washington County, and Comparison Regions, 2013-2017

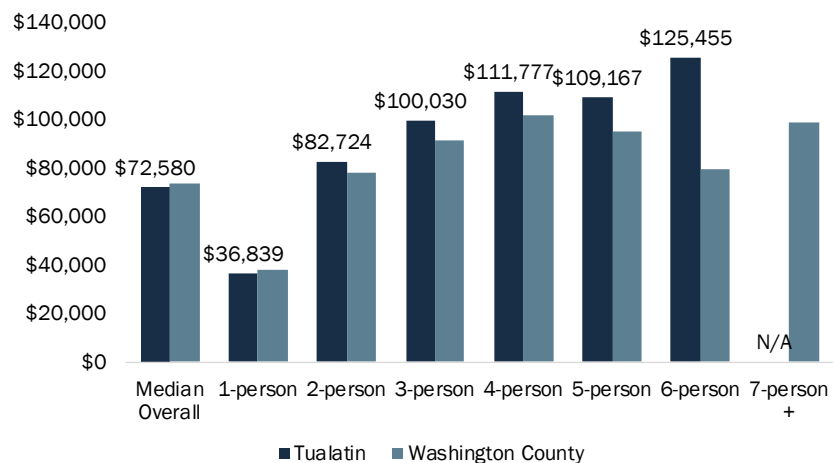
Source: US Census Bureau, 2013-2017 ACS 5-Year Estimate, Table B25119.



In Tualatin, household income tends to increase with household size, peaking with households with four to six people.

Exhibit 19. Household Income by Household Size, Tualatin and Washington County, 2013-2017

Source: US Census Bureau, 2013-2017 ACS 5-Year Estimate, Table B19019.



Median household income was comparatively lower for households over 65 years in Tualatin and the county.

In Tualatin, median household income for householders 65 years and older was \$57,073, compared to the overall median of \$81,118 in the 2014-2018 period.

However, older households may have wealth and savings not reflected in this statistic.

Household income varies among households with different races and ethnicity.

In Tualatin, median household income was proportionately higher for households with an Asian-identifying head of household.

The median household income was proportionately lower than the overall average for households with a head of household identifying as Latino or some other race.

Exhibit 20. Median Household Income by Age, Tualatin, 2013-2017

Source: US Census Bureau, 2013-2017 ACS 5-Year Estimate, Table B19049.

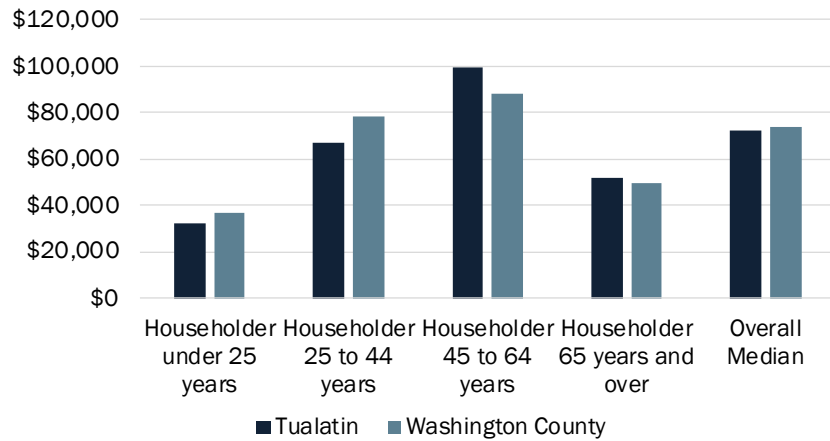
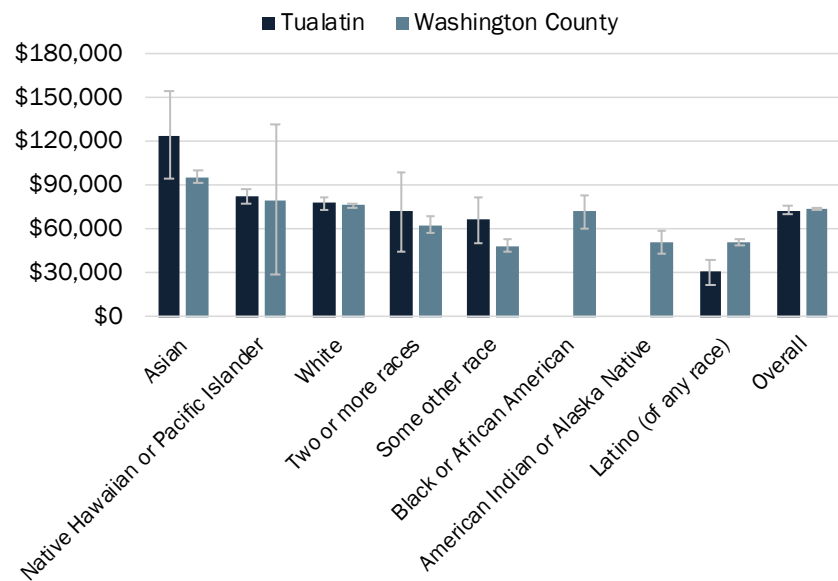


Exhibit 21. Median Household Income by Race and Ethnicity for the Head of Household, Tualatin and Washington County, 2013-2017

Source: US Census Bureau, 2013-2017 ACS 5-Year Estimate, Table S1903.

Note: In Tualatin, data was not available for heads of households identifying as Black or African American and as American Indian or Alaska Native. Gray bars denote the potential upper and lower bound of the estimate using the margin of error reported by the Census.



Housing Market Conditions and Trends

An analysis of housing market conditions and trends in Tualatin provides insight into the functioning of the local housing market. The housing types used in this analysis are consistent with needed housing types as defined in ORS 197.303:

- **Single-family detached** includes single-family detached units, manufactured homes on lots and in mobile home parks, and accessory dwelling units.
- **Single-family attached** is all structures with a common wall where each dwelling unit occupies a separate lot, such as row houses or town houses.
- **Multifamily** is all attached structures (e.g., duplexes, triplexes, quadplexes, and structures with five or more units) other than single-family detached units, manufactured units, or single-family attached units.

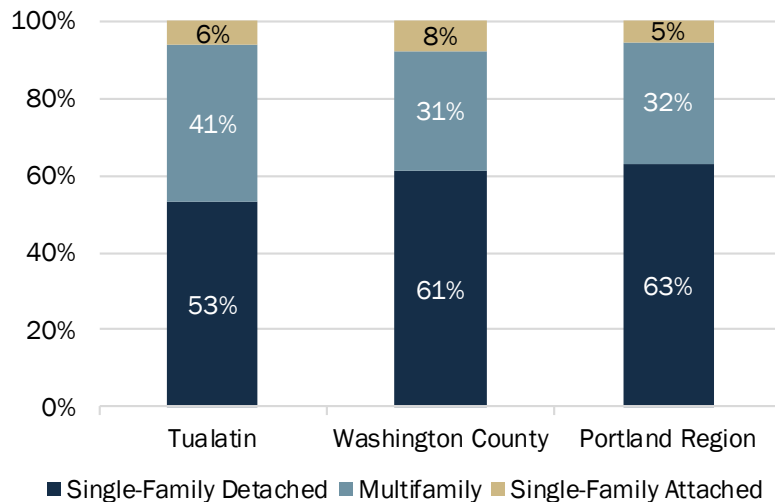
Existing Housing Stock

According to the 2013-2017 American Community Survey (ACS) from the US Census, Tualatin had 11,329 dwelling units, an increase of 2,110 dwelling units from 2000. In that time, about 771 units of multifamily housing were built in Tualatin, accounting for 37% of the 2,110 new units over that period.

Tualatin had a smaller share of single-family detached housing and a larger share of multifamily housing than Washington County and the Portland Region.

Exhibit 22. Housing Mix, Tualatin, Washington County, Portland Region, 2013-2017

Source: US Census Bureau, 2013-2017 ACS Table B25024.



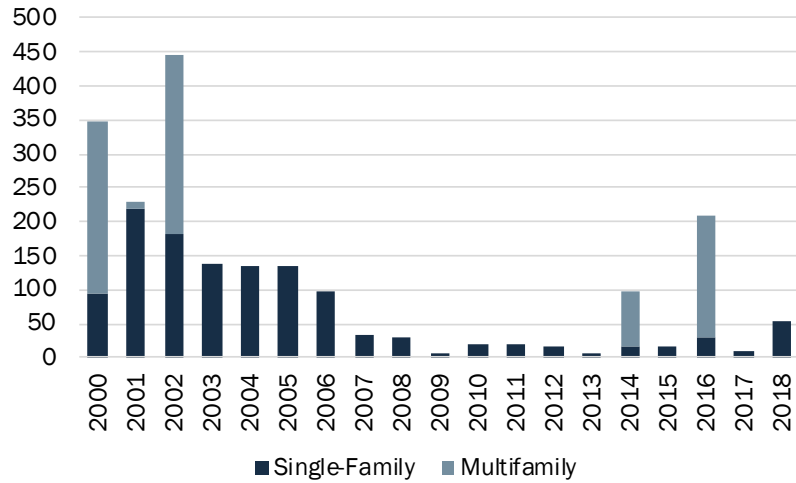
Development of multifamily housing was strong and cyclical in Tualatin.

Between 2000 and 2016, 789 new multifamily units were developed in Tualatin. Between 2000 and 2018, 1,262 new single-family units were developed in Tualatin.

Note: The single-family category includes detached and attached single-family homes. The multifamily category is inclusive of all multifamily types (duplexes to larger units).

Exhibit 23. Units Built by Year and Type of Unit, Tualatin, 2000 to 2016/2018⁵⁴

Source: RLIS (data pulled November 2020).



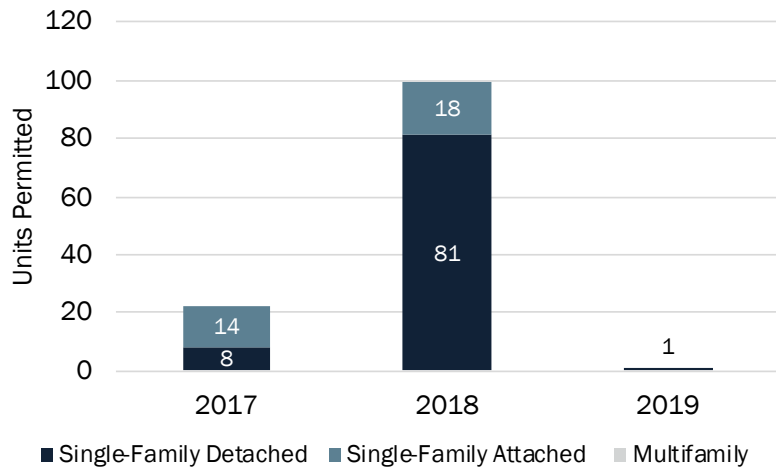
In the last three years, mostly single-family detached housing has been permitted in Tualatin.

In 2019, a 264-unit apartment complex began the permitting process.

Another 116-unit affordable housing apartment complex is currently in process to annex to Tualatin.

Exhibit 24. Units Permitted, Tualatin, 2017, 2018, 2019

Source: City of Tualatin Permit Database.



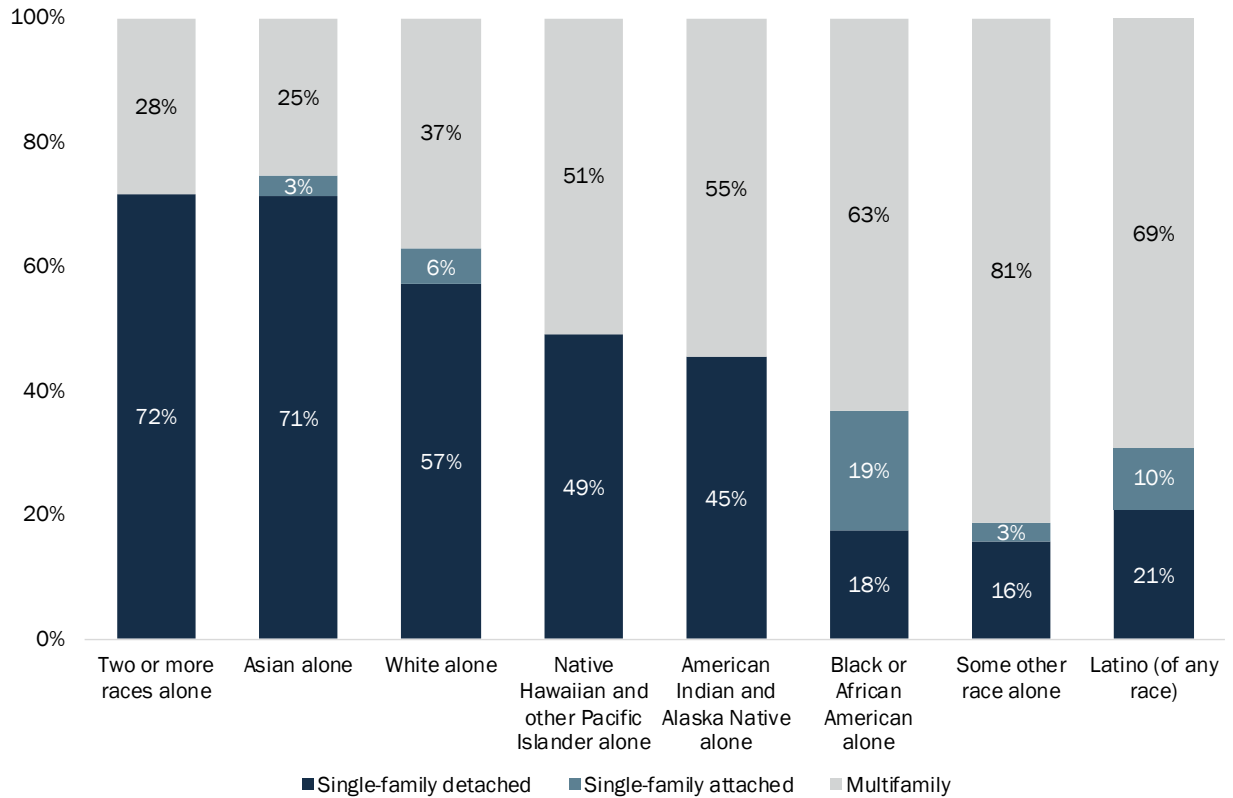
⁵⁴ A disclaimer about RLIS data: data for single-family and multifamily units is updated by Metro periodically. In Tualatin, RLIS data for multifamily units represents development through 2016 and the RLIS data for single-family units represents development through 2018.

Exhibit 25 shows that households that identified as Two or More Races or Asian were most likely to live in single-family detached housing (72% and 71%, respectively). The people most likely to live in multifamily housing were Black, at 63% of households; Latinos (of any race), at 70% of households; and people identifying as some other race, at 81% of households.

While this exhibit reflects the types of housing these groups *currently* live in and/or what they can currently afford to live in, it may not reflect their housing preferences.

Exhibit 25. Housing Mix by Race and Ethnicity, Tualatin 2013-2017

Source: US Census Bureau, 2013-2017 ACS Table B25032 B-H, I.



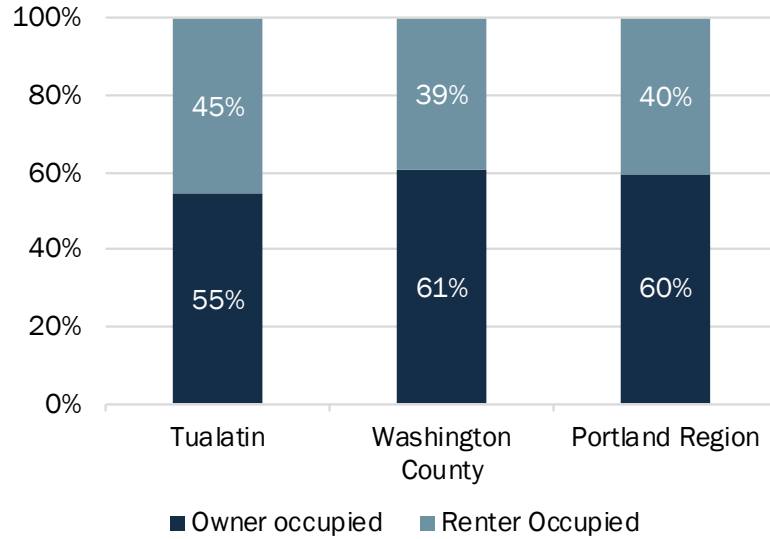
Housing Tenure

Housing tenure describes whether a dwelling is owner or renter-occupied. In 2000 as well as in the 2013-2017 period, 55% of Tualatin’s housing stock was owner occupied and 45% was renter occupied.

Tualatin had a lower homeownership rate than Washington County and the Portland Region by 6 percentage points.

Exhibit 26. Tenure, Occupied Units, Tualatin, Washington County, and Portland Region, 2013-2017

Source: US Census Bureau, 2013-2017 ACS 5-Year Estimates, Table B24003.

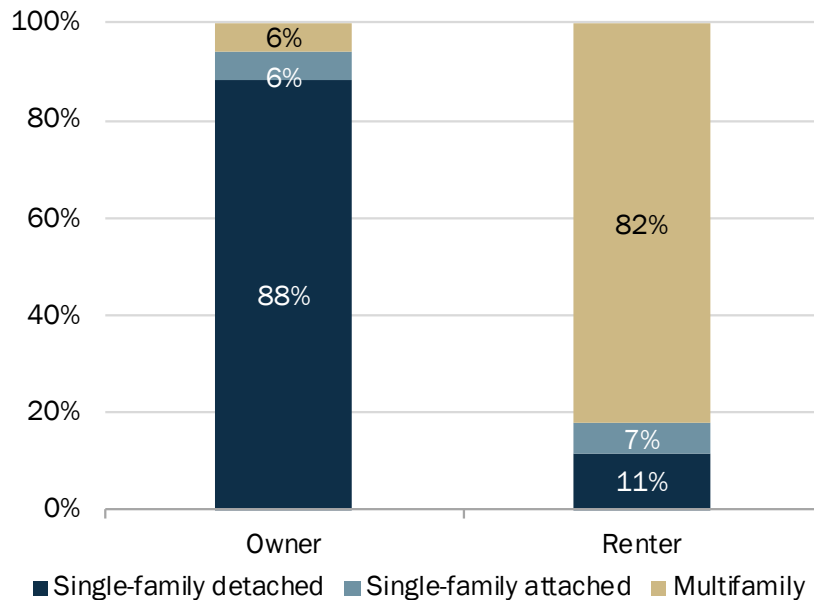


Most of Tualatin homeowners (88%) lived in single-family detached housing.

In comparison, most of Tualatin renters (82%) lived in multifamily housing.

Exhibit 27. Housing Units by Type and Tenure, Tualatin, 2013-2017

Source: US Census Bureau, 2013-2017 ACS Table B25032.

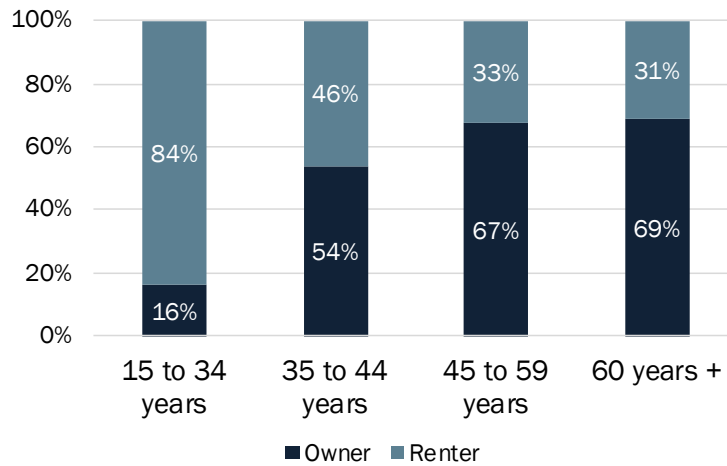


Tualatin's household homeownership rate increases with age.

In Tualatin, nearly 70% of householders over the age of 60 owned their own home.

Exhibit 28. Housing Tenure by Age of the Head of Household, Tualatin, 2013-2017

Source: US Census Bureau, 2013-2017 ACS Table B25007.

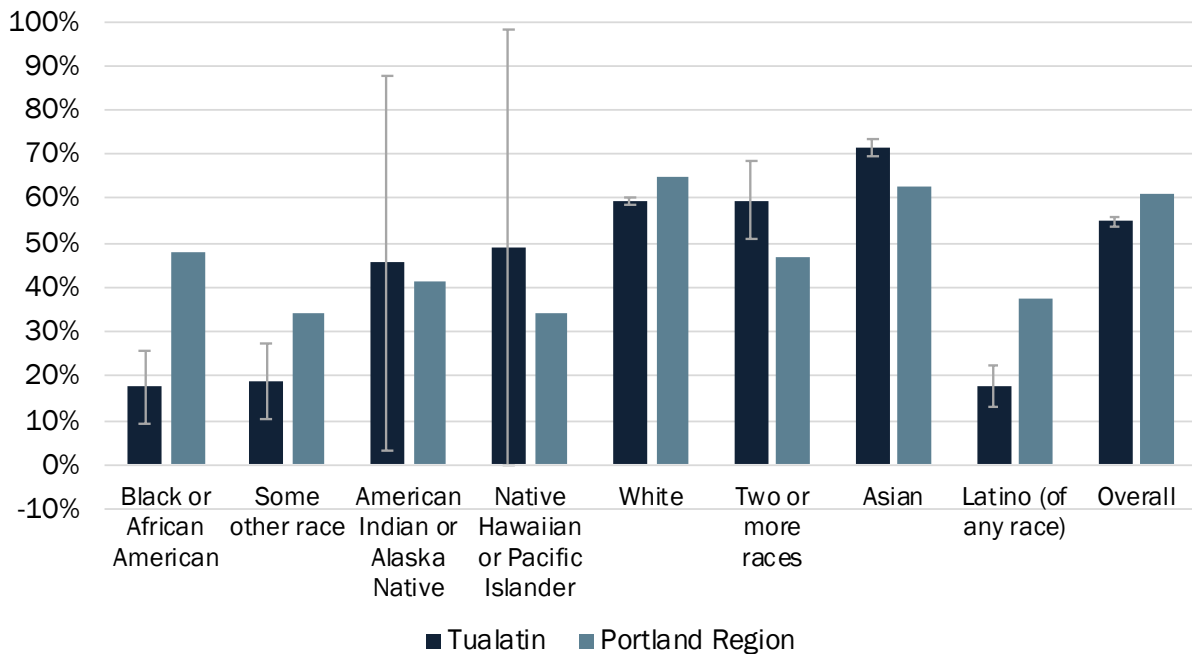


As Exhibit 29 shows, in Tualatin, the homeownership rates were lowest for households with a Black/African American or Latino-identifying head of household.

Exhibit 29. Homeownership Rate by Head of Households' Race and Ethnicity, Tualatin and Washington County, 2013-2017

Source: US Census Bureau, 2013-2017 ACS Table B25003 and B25003 B-I.

Note: Gray bars denote the potential upper and lower bound of the estimate using the margin of error reported by the Census. For American Indian or Alaska Native and Native Hawaiian or Pacific Islander, the margin of error is very large in Tualatin because those populations are so small in Tualatin.



Vacancy Rates

Housing vacancy is a measure of housing that is available to prospective renters and buyers. It is also a measure of unutilized housing stock. The Census defines vacancy as "unoccupied housing units . . . determined by the terms under which the unit may be occupied, e.g., for rent, for sale, or for seasonal use only."

According to the 2013-2017 Census, the vacancy rate in Tualatin was the lowest at 4.3%, compared to 4.8% for Washington County and 5.5% for the Portland Region.

Tualatin's homeowner vacancy rate is lower than its rental and overall vacancy rates.

Exhibit 30. Vacancy Rate by Tenure, Tualatin, 2013-2017

Source: US Census Bureau 2013-2017 ACS Table DP04.

Homeowner	1.4% of Total Dwelling Units
Rental	3.7% of Total Dwelling Units
Total	4.3% of Total Dwelling Units

As of 2013-2017, less than half a percent of Tualatin's dwelling units were vacant for seasonal, recreational, or occasional use (e.g., short-term rentals or vacation homes).

Exhibit 31. Vacancy for Seasonal, Recreational, or Occasional Use, Tualatin, 2000 and 2013-2017⁵⁵

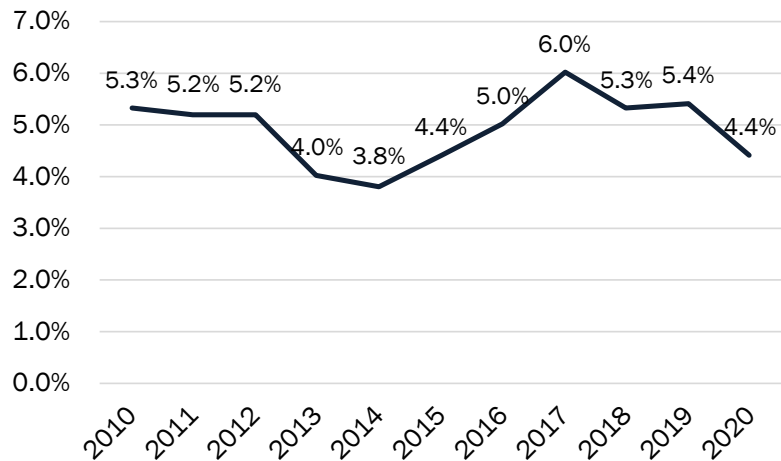
Source: US Census Bureau, 2000 Decennial Census SF1 Table H005, 2013-2017 ACS Table B25004.

2000	43 Units	0.5% of Total Dwelling Units
2013-2017	44 Units	0.4% of Total Dwelling Units

Tualatin's multifamily vacancy rate was 4.4% in 2020, down from Tualatin's 10-year high of 6.0% in 2017.

Exhibit 32. Average Multifamily Vacancy Rate, Tualatin, 2010-2020

Source: CoStar.



⁵⁵ Short-term rentals (commercial lodging) are not an allowed use in Tualatin's residential zones.

Rent-Restricted and Emergency Housing

Governmental agencies offer subsidies to support housing development for extremely low income, very low-income, and low-income households. Tualatin has three rent-restricted housing developments, with 604 subsidized units. These 604 units represented about 5.3% of Tualatin’s total housing stock in the 2013-2017 period. In addition to these rent-restricted units, and as of August 5, 2019, households in Tualatin utilized 113 of Washington County Housing Authority’s Housing Choice Vouchers.⁵⁶

Exhibit 33. Government-Assisted Housing, Tualatin, 2020

Source: Oregon Housing and Community Services, Affordable Housing Inventory in Oregon.

Housing Developments	Total Units	Affordable Units	Population Served	Government Subsidy Type	Affordability Contract Expiration
Terrace View	100	100	Family	LIHTC 4%	January 2028
Tualatin Meadows	240	240	Family	LIHTC 4%	January 2031
Woodridge	264	264	Family	OHCS Grants	March 2049
Total	604	604			

The Beaverton/Washington County Continuum of Care region has 240 emergency, safe haven, and transitional housing beds and 725 permanent housing beds for people experiencing homelessness.

Exhibit 34. Facilities and Housing Targeted to Households Experiencing Homelessness, Hillsboro, Beaverton/Washington County Continuum of Care Region, 2019

Source: HUD 2019 Continuum of Care Homeless Assistance Programs, Housing Inventory Count Report, Hillsboro, Beaverton/Washington County Continuum of Care.

Population Served	Emergency, Safe Haven, and Transitional Beds			Permanent Housing Beds
	Emergency Shelter	Safe Haven	Transitional Housing	
Households with Adult(s) and Children	103	-	41	341
Households with Only Adults	6	10	78	384
Unaccompanied Youth	2	-	-	-

⁵⁶ More information about Housing Choice Vouchers:

https://www.hud.gov/program_offices/public_indian_housing/programs/hcv/about/fact_sheet

Manufactured Housing Communities

Manufactured homes provide a source of affordable housing in Tualatin. They provide a form of homeownership that can be made available to low and moderate-income households. Cities are required to plan for manufactured homes—both on lots and in parks. Exhibit 35 shows that Tualatin has two manufactured housing parks, with a total of 178 spaces within its city limits.

Exhibit 35. Inventory of Mobile/Manufactured Home Parks, Tualatin City Limits, March 2019

Source: Oregon Manufactured Dwelling Park Directory.

Name	Location	Type	Total Spaces	Vacant Spaces	Plan Designation
Angel Haven	18485 SW Pacific Dr	Senior	129	2	RML
Willow Glen	9700 SW Tualatin Rd	Family	49	1	RML
Total			178	3	

People Experiencing Homelessness

According to HUD’s 2019 Homeless Assessment Report, across the United States, people experiencing homelessness increased. People experiencing *unsheltered* homelessness increased across all racial groups, among women and girls, and for people 25 and older.⁵⁷ Oregon had the second-highest rate of people experiencing unsheltered homelessness in the United States (64% of total people experiencing homelessness), behind California only. Oregon also had the largest change in homelessness by state (an increase of 1,400 people or 10% change from 2018-2019), again behind California. The following exhibits provide local estimates of homelessness in Tualatin’s region.

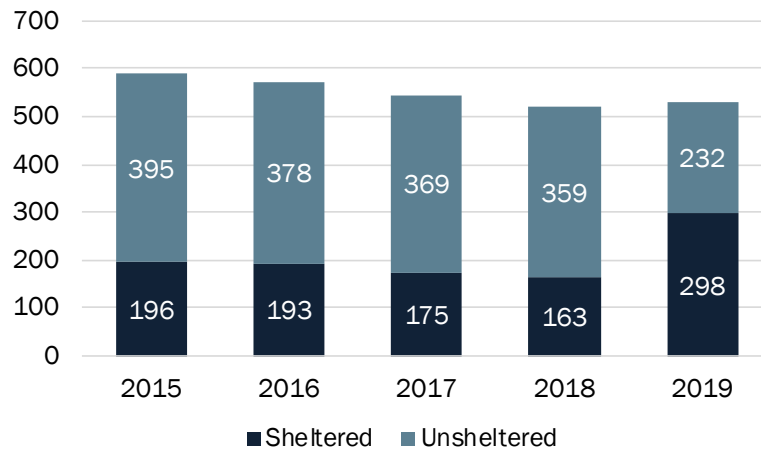
⁵⁷ The US Department of Housing and Urban Development. (2019). The 2019 Annual Homeless Assessment Report (AHAR) to Congress. Office of Community Planning and Development.

In 2019, Tualatin's Continuum of Care (CoC) district counted 530 people experiencing homelessness in their annual Point-in-Time estimate.

In 2019, 44% of the people experiencing homelessness were unsheltered, down from 67% in 2015.

Exhibit 36. Homelessness Estimate (Sheltered and Unsheltered), Hillsboro/Beaverton/Washington County CoC, 2015-2019

Source: Annual Homeless Assessment Report (AHAR) PIT data.



About 44 people were experiencing unsheltered homelessness in the Tigard/Tualatin area in 2020.

Proportioning out these individuals using population, this analysis estimates that about 15 individuals experienced homeless in Tualatin.

Exhibit 37. Unsheltered Homelessness, Washington County and Tualatin/Tigard Area, 2020

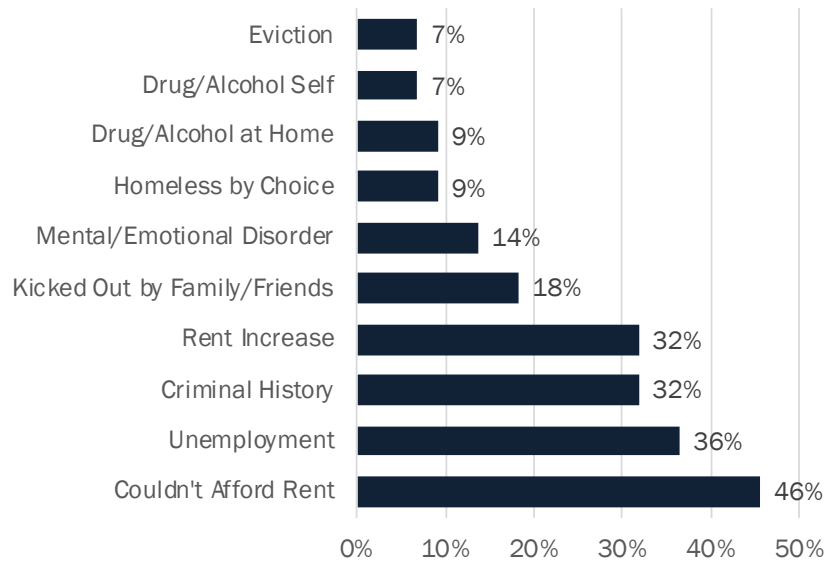
Source: Washington County Department of Housing Services, PIT data. Portland State University Population Estimates for Tualatin and Tigard Area.

Washington County	307⁵⁸ Unsheltered People	33% Chronic Homeless	18% Domestic Violence
Tualatin / Tigard Area	44 Unsheltered People	27% Chronic Homeless	14% Domestic Violence
Tualatin	15 Estimated Unsheltered People	-	-

The primary reason for homelessness in the Tigard/Tualatin area was inability to afford rent.

Exhibit 38. Reason for Unsheltered Homelessness, Tualatin/Tigard Area, 2020

Source: Washington County Department of Housing Services, from the PIT 2020 Tigard Tualatin Presentation. Exhibit remade by ECONorthwest for readability.



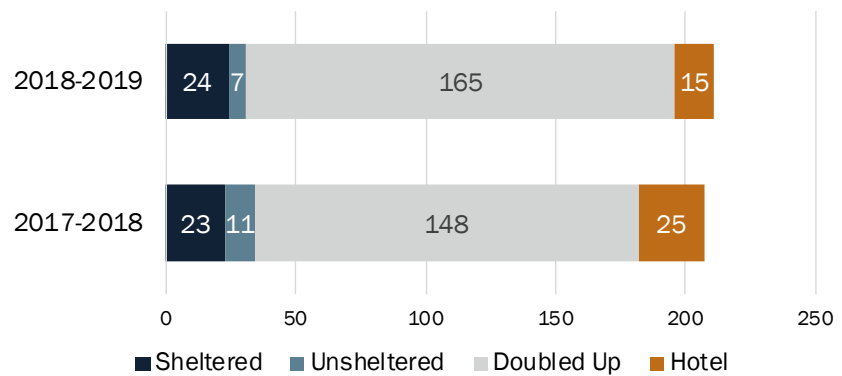
⁵⁸ The PIT count is a snapshot of individuals experiencing homelessness on a single night in a community. Though the PIT count is not a comprehensive survey, it serves as a measure of homelessness at a given point in time and is used for policy and funding decisions.

From the 2017-18 school year to the 2018-19 school year, student homelessness increased from 207 students to 211 students, resulting in an increase of four students.

Of the 211 students in 2018-19 experiencing homelessness, 36 were unaccompanied youth (17%).

Exhibit 39. Students Homeless by Living Situation, Tigard/Tualatin School District, 2017-2018 and 2018-2019

Source: McKinney Vento, Homeless Student Data.



Based on the Oregon's Regional Housing Needs Analysis, Tualatin will need 252 housing units to accommodate people experiencing homelessness in the 2020-2040 period.

Exhibit 40. Estimate of Housing Need for People Experiencing Homelessness, Tualatin, 2020 to 2040

Source: From the Report *Implementing a Regional Housing Needs Analysis Methodology in Oregon: Approach, Results, and Initial Recommendations* by ECONorthwest, August 2020.

252 Dwelling Units

New Units Need for People Experiencing Homelessness (2020-2040)

13 Dwelling Units

Annual Average

Housing Affordability Considerations

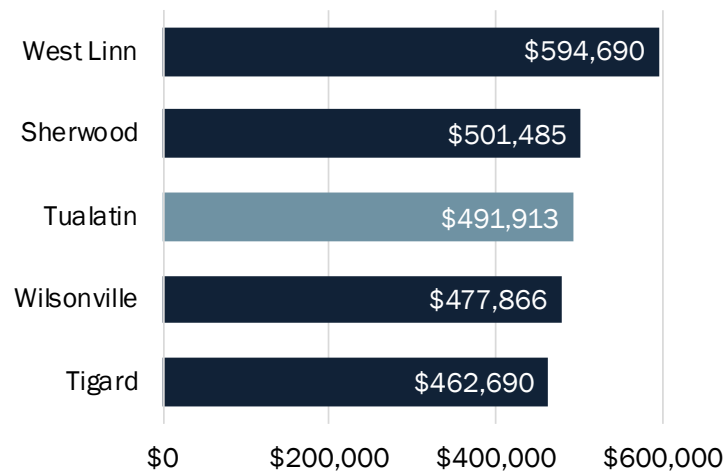
This section describes changes in sales prices, rents, and housing affordability in Tualatin. It uses cities in the region, as well as Washington County and Oregon, as comparisons. Both housing sales prices and rents have increased steadily in Tualatin and the greater region over the last several years.

Housing Costs

In 2020, Tualatin's annual median home sales price was \$491,913, or \$102,777 less than West Linn's and \$29,223 more than Tigard's median home sales price.

Exhibit 41. Median Home Sales Price, Tualatin and Comparison Cities, 2020 Annual Median

Source: Redfin.

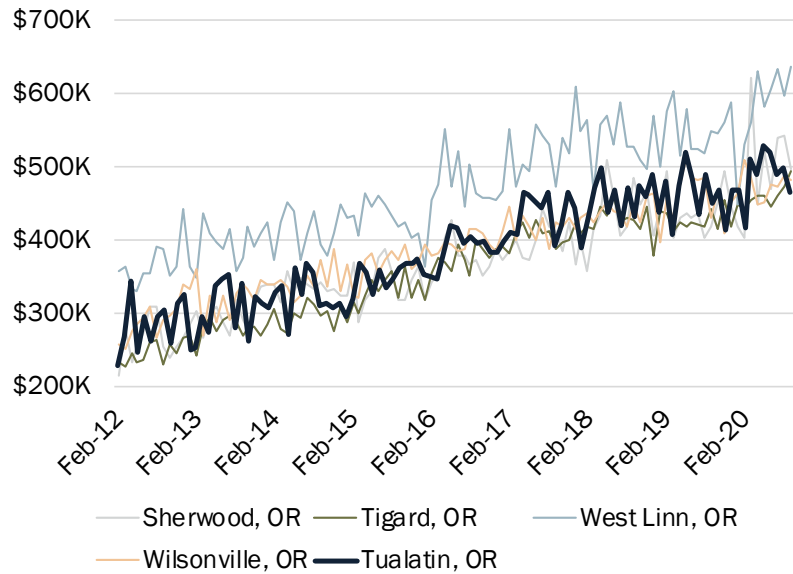


Over the last decade, median home sales prices have marched upward in Tualatin and comparison cities. In 2020, Tualatin’s median home sales price was \$491,913.

Between February 2012 and 2020, home sales prices increased by \$261,913 (114%) in Tualatin, consistent with changes in sales prices in nearby cities.

Exhibit 42. Median Sales Price, Single-Family housing, Tualatin and Comparison Cities, February 2012–September 2020

Source: Redfin.

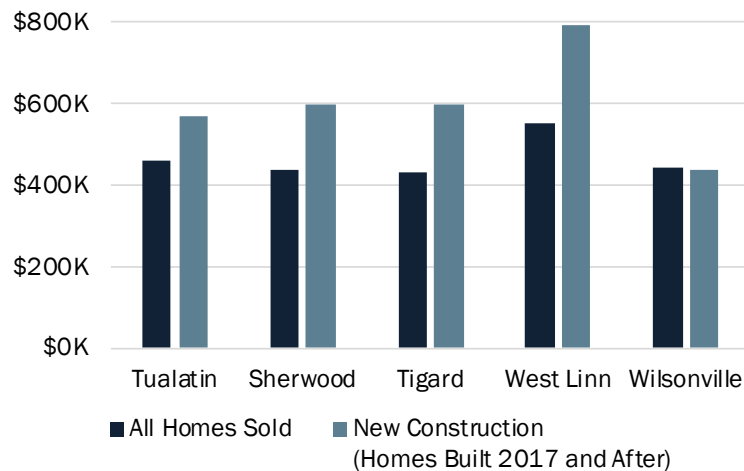


Newly built homes generally have higher prices than existing housing.

In Tualatin, the median sales price of all homes sold since 2017 (including existing housing) was \$461,204, compared to \$566,900 for new homes sold (i.e., new construction—homes built since 2017).

Exhibit 43. New Construction Price Premium, Tualatin and Comparison Cities, January 2017 through September 2020

Source: Redfin.



Renter Costs

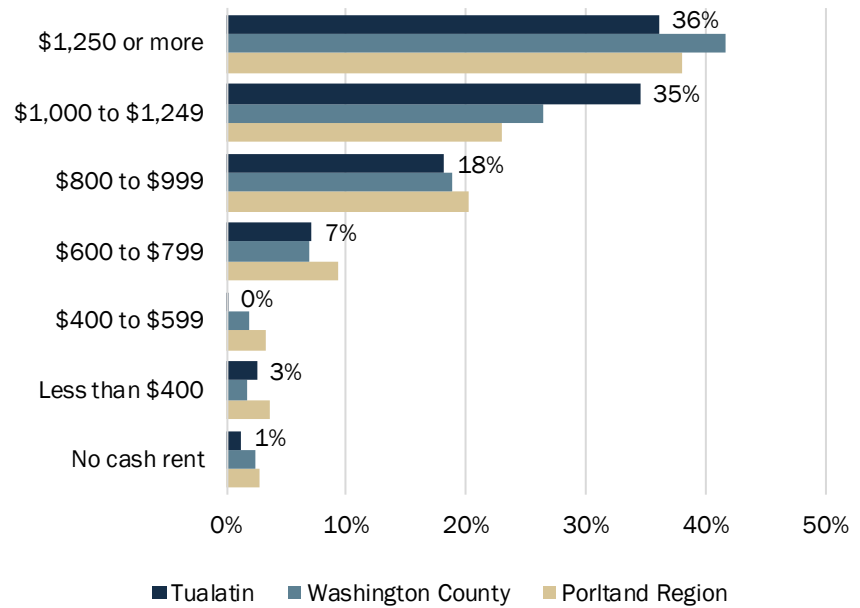
Rental costs are increasing in Tualatin. According to the US Census and ACS, median gross rents in Tualatin increased from \$768 in 2000 to \$1,154 in the 2013-2017 period.

Most renters in Tualatin paid more than \$1,000 per month in rent.

About 36% of Tualatin’s renters paid \$1,250 or more in gross rent per month, a smaller share than renters across Washington County (42%) and the Portland Region (38%).

Exhibit 44. Gross Rent, Tualatin, Washington County, and Portland Region, 2013-2017

Source: US Census Bureau, 2013-2017 ACS Table B25063.



The average asking rent per unit has increased steadily for all bedroom sizes since 2010.

The asking rent for a 2-bedroom unit in Tualatin increased from \$873 in 2010 to \$1,334 in 2019, an increase of \$461 (53% change).

Exhibit 45. Average Multifamily Asking Rent by Bedroom Size, Tualatin, 2010 through 2019⁵⁹

Source: CoStar.

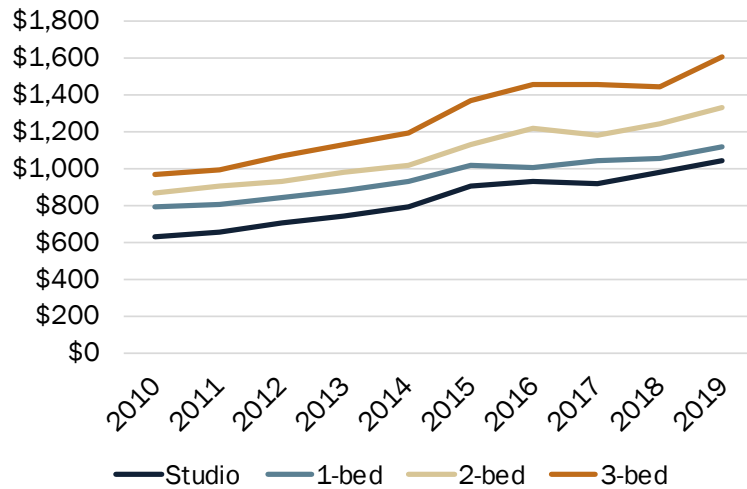


Exhibit 46 presents the findings of an assessment of available rental properties advertised on Apartments.com as of December 2020. The rental costs for these developments likely have

⁵⁹ This analysis excludes units with four or more bedrooms, as there is highly limited observations in the CoStar inventory for Tualatin.

higher asking rents compared to all rental housing in Tualatin. This is because Apartments.com (and similar platforms) are more likely to include listings for newer, professionally managed, larger apartment buildings (those typically priced with a premium). Exhibit 46 shows a broader, more complete picture of housing costs for renters in Tualatin than Census or CoStar data alone.

Exhibit 46. Rent Survey Findings, Tualatin, December 2020

Source: Apartments.com and Portland Housing Bureau.

Housing Development	Rent Range	1-bedroom	2-bedrooms	3-bedrooms
Alden	\$1,269 - \$1,729	\$1,269 - \$1,369	\$1,445 - \$1,545	\$1,679 - \$1,729
Arya at Hedges Creek	\$1,373 - \$2,446	\$1,373 - \$1,684	\$1,478 - \$2,022	\$1,756 - \$2,446
Chelan	\$950 - \$1,295	\$950 - \$1,025	\$1,125 - \$1,175	\$1,250 - \$1,295
Eddylane at Bridgeport	\$1,187 - \$2,991	\$1,348 - \$1,872	\$1,755 - \$2,991	\$2,305 - \$2,350
Forest Rim Apartments	\$1,295 - \$1,885	\$1,295 - \$1,575	\$1,495 - \$1,855	\$1,885
River Lofts	\$1,375 - \$1,877	n/a	\$1,375 - \$1,877	n/a
Stonethrow Apartments	\$1,360 - \$4,948	\$1,360 - \$4,942	\$1,590 - \$4,948	n/a
Tualatin Heights	\$1,336 - \$1,508	n/a	\$1,336 - \$1,508	n/a
Affordable Rents				
30% MFI	\$518 - \$718	\$518	\$621	\$718
50% MFI	\$863 - \$1,197	\$863	\$1,036	\$1,197
80% MFI	\$1,382 - \$1,916	\$1,382	\$1,658	\$1,916
100% MFI	\$1,726 - \$2,394	\$1,726	\$2,072	\$2,394

Housing Cost Burden

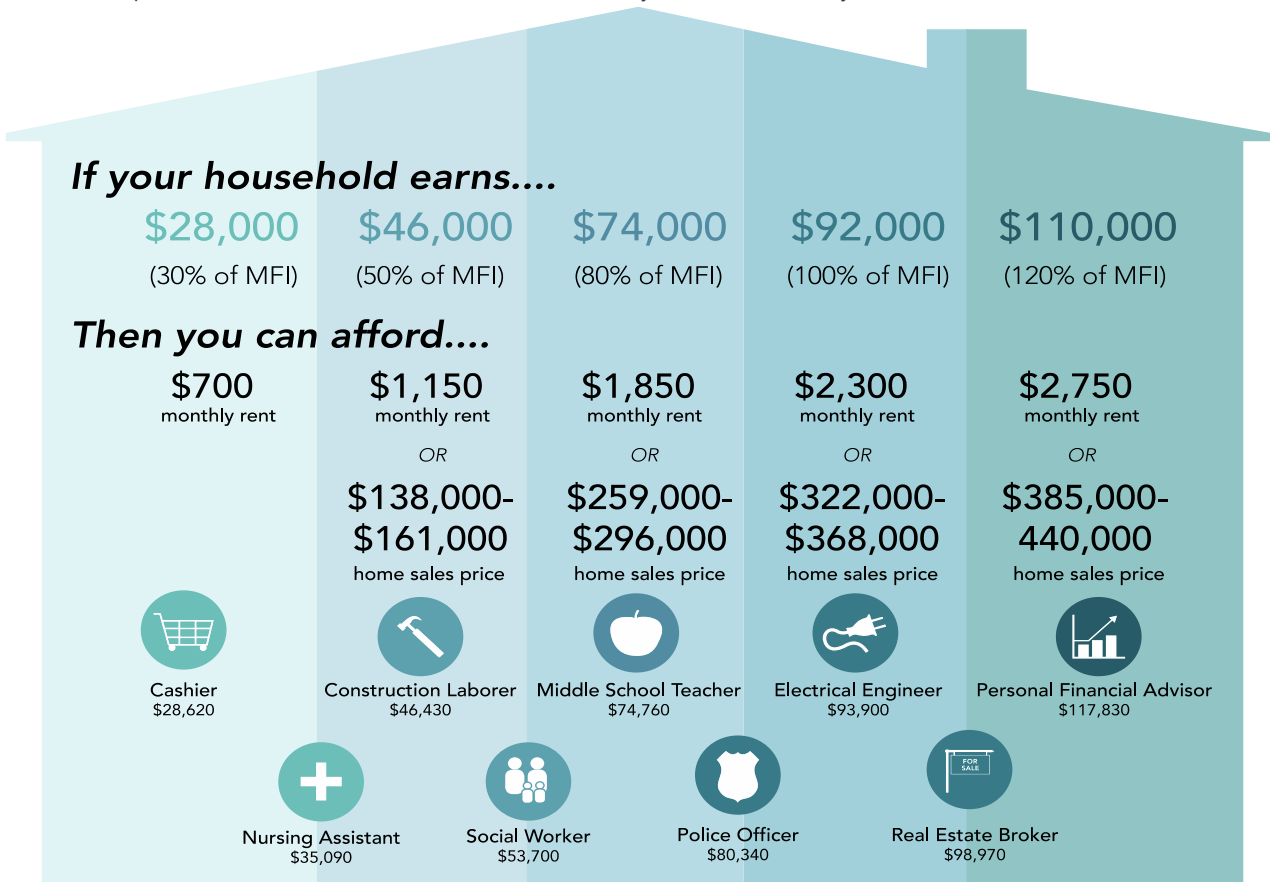
Financially attainable housing costs for households across the income spectrum in Washington County are identified in Exhibit 47. For example, a household earning Median Family Income in Washington County (about \$92,000 per year for a family of four) can afford a monthly rent of about \$2,300,⁶⁰ or a home roughly valued between \$322,000 and \$368,000, without cost burdening themselves.

A household would need to earn about \$140,500 a year (153% of MFI for a family of four) to afford the median sales price of a home in Tualatin (\$491,913). A household would need to earn about \$58,000 (63% of MFI for a family of four) to afford the rent on a two-bedroom apartment in Tualatin (\$1,450).

⁶⁰ Note that Median Family Income for the region is different than median household income (MHI) for Tualatin (see Exhibit 18). MFI is determined by HUD for each metropolitan area and nonmetropolitan county. It is adjusted by family size—in that 100% MFI is adjusted for a family of four. MHI is a more general term. MHI includes the income of the householder and all other individuals 15 years old and over in the household, whether they are related to the householder or not.

Exhibit 47. Financially Attainable Housing, by Median Family Income (MFI) for Washington County (\$92,000), Tualatin, 2020

Source: US Department of HUD 2020. Note: MFI is Median Family Income for a family of 4.



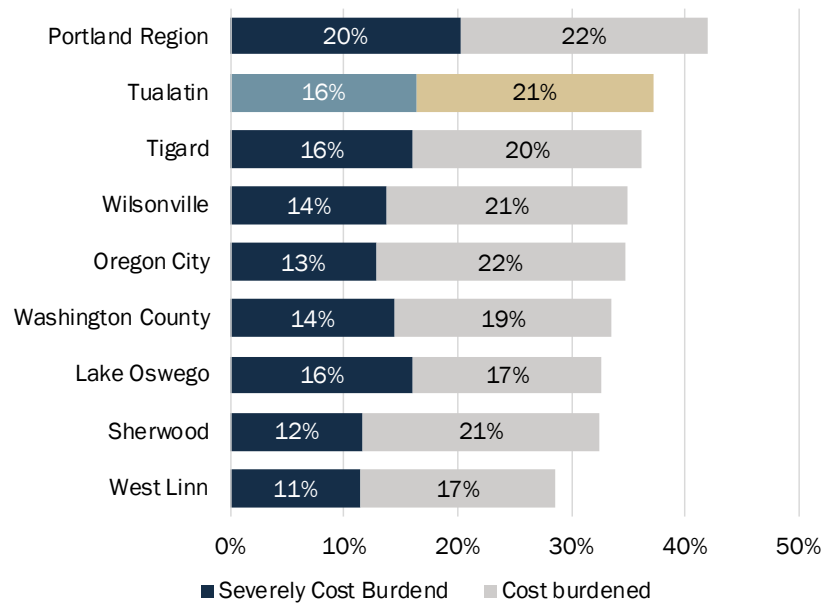
Because the local housing market cannot produce income-restricted, subsidized affordable housing at sufficient levels — and because it cannot often produce moderate-income/workforce housing without subsidy — many households in Tualatin are cost burdened (as Exhibit 48 to Exhibit 51 show). A household is defined by HUD as cost burdened if their housing costs exceed 30% of their gross income.⁶¹ A household that spends 50% or more of their gross income on housing costs is considered to be severely cost burdened by HUD and the State of Oregon.

Overall, about 37% of all households in Tualatin were cost burdened.

In the 2013-2017 period, Tualatin had one of the highest rates of cost-burdened households relative to other comparison areas.

Exhibit 48. Housing Cost Burden, Tualatin, Washington County, and Comparison Areas, 2013-2017

Source: US Census Bureau, 2013-2017 ACS Tables B25091 and B25070.



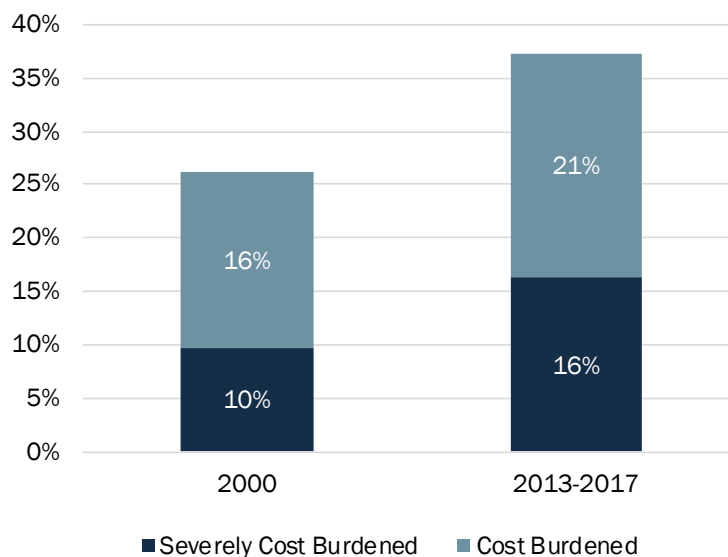
⁶¹ US Department of Housing and Urban Development (HUD). See https://www.huduser.gov/portal/pdredge/pdr_edge_featd_article_092214.html

From 2000 to the 2013-2017 period, the share of cost-burdened and severely cost burdened households in Tualatin grew by 11%.

Tualatin has also experienced a substantial rise in its renters who are severely cost burdened. In the 2014-2018 time period, 27% of Tualatin’s renters were severely cost burdened,⁶² compared to 26% in the 2013-2017 time period.

Exhibit 49. Change in Housing Cost Burden, Tualatin, 2000 to 2013-2017

Source: US Census Bureau, 2000 Decennial Census, Tables H069 and H094 and 2013-2017 ACS Tables B25091 and B25070.

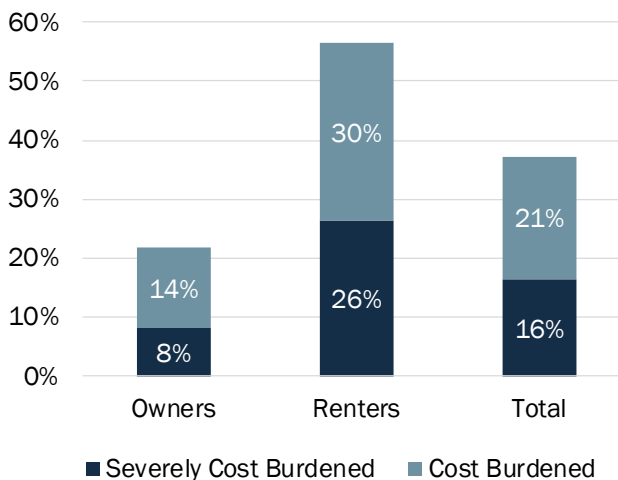


Renters were more likely to be cost burdened than homeowners.

In the 2013-2017 period, about 56% of Tualatin’s renters were cost burdened or severely cost burdened, compared to 22% of homeowners.

Exhibit 50. Housing Cost Burden by Tenure, Tualatin, 2013-2017

Source: US Census Bureau, 2013-2017 ACS Tables B25091 and B25070.



⁶² Oregon Department of Land Conservation and Development. “Severe Rent Burden in Oregon 2020,” 2020.

Nearly all renter households earning less than \$35,000 per year were cost burdened.

Most households earning between \$35,000 and \$50,000 per year were cost burdened.

Exhibit 51. Cost-Burdened Renter Households, by Household Income, Tualatin, 2013-2017

Source: US Census Bureau, 2013-2017 ACS Table B25074.

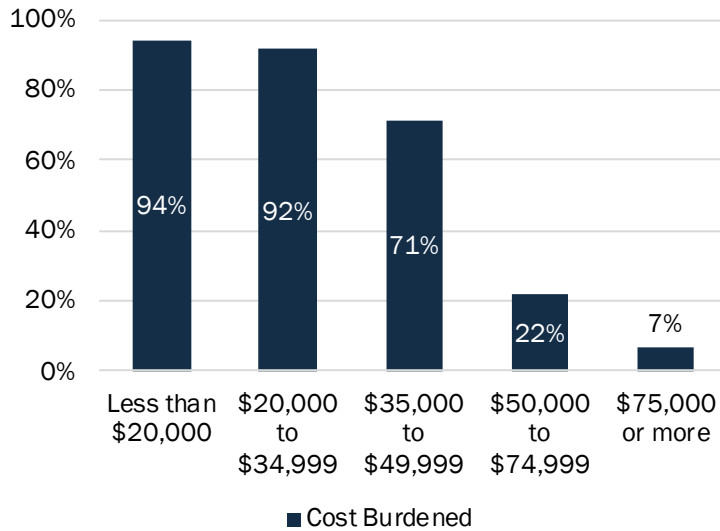


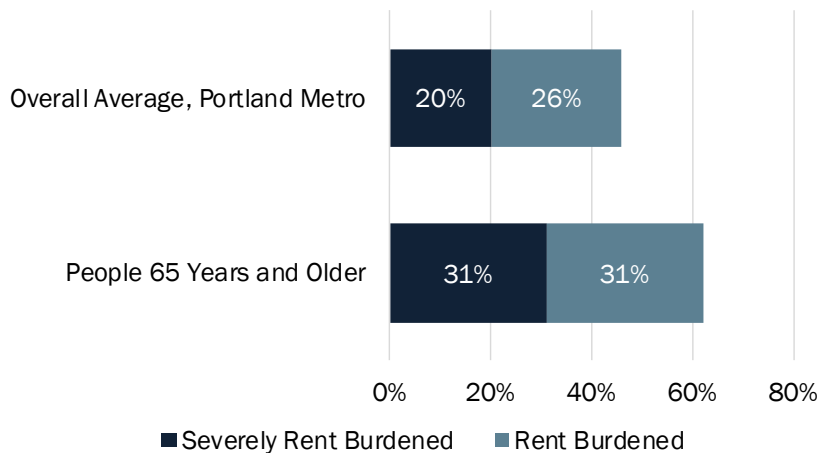
Exhibit 52 through Exhibit 54 present information about cost burden among different populations for the Portland Region. This information is not available on a city-by-city basis and is pulled from a statewide analysis from the report *Implementing a Regional Housing Needs Analysis Methodology in Oregon: Approach, Results, and Initial Recommendations* by ECONorthwest, August 2020.

Renters 65 years of age and older are disproportionately cost burdened compared to the Portland Region average.

Over 60% of renters aged 65 and older are cost burdened.

Exhibit 52. Cost-Burdened Renter Households, for People 65 Years of Age and Older, Portland Region, 2018

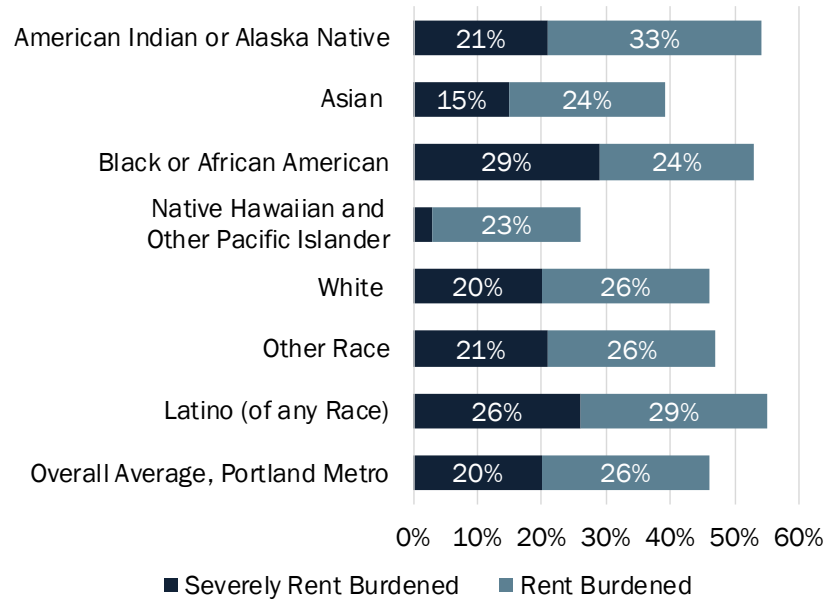
Source: US Census, 2018 ACS 1-Year PUMS Estimates. From the Report *Implementing a Regional Housing Needs Analysis Methodology in Oregon: Approach, Results, and Initial Recommendations* by ECONorthwest, March 2021.



Compared to the average renter household in the Portland Region, those that identified as American Indian or Alaska Native, Black or African American, and Latino were disproportionately cost burdened.

Exhibit 53. Cost-Burdened Renter Households, by Race and Ethnicity, Portland Region, 2018

Source: US Census, 2018 ACS 1-Year PUMS Estimates. From the Report *Implementing a Regional Housing Needs Analysis Methodology in Oregon: Approach, Results, and Initial Recommendations* by ECONorthwest, March 2021.



Renters with one or more disabilities in the Portland Region are disproportionately cost burdened.

About 46% of renters in the Portland Region are cost burdened, compared to 53% of renters with a hearing or vision disability and 65% of renters with a disability other than a hearing or vision-based disability in the Portland Region.

Other disabilities include self-care difficulty (having difficulty bathing or dressing), independent living difficulty (having difficulty doing errands alone), ambulatory difficulty (having serious difficulty walking or climbing stairs), and cognitive difficulty (having difficulty remembering, concentrating, or making decisions).

Those designated as “other family household,” which includes single-parent households, are disproportionately cost burdened.

About 55% of renters in other family households, such as single-parent households, are cost burdened more frequently than the overall average in the region.

Exhibit 54. Cost-Burdened Renter Households, for People with Disabilities, Portland Region, 2018

Source: US Census, 2018 ACS 1-Year PUMS Estimates. From the Report *Implementing a Regional Housing Needs Analysis Methodology in Oregon: Approach, Results, and Initial Recommendations* by ECONorthwest, March 2021.

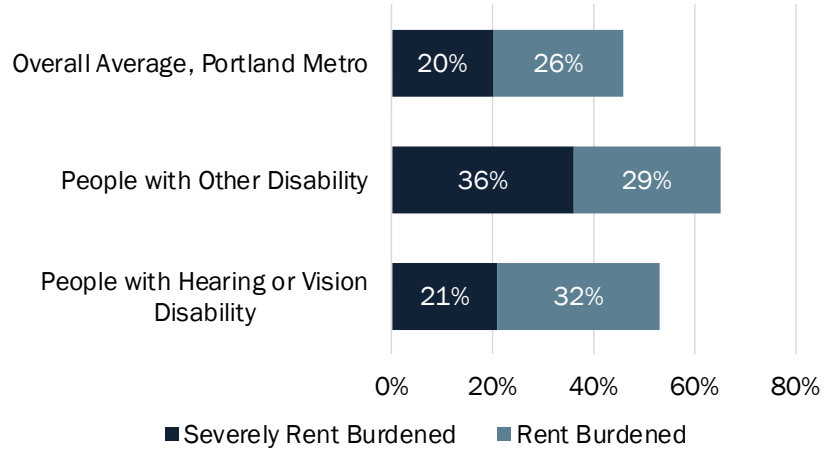
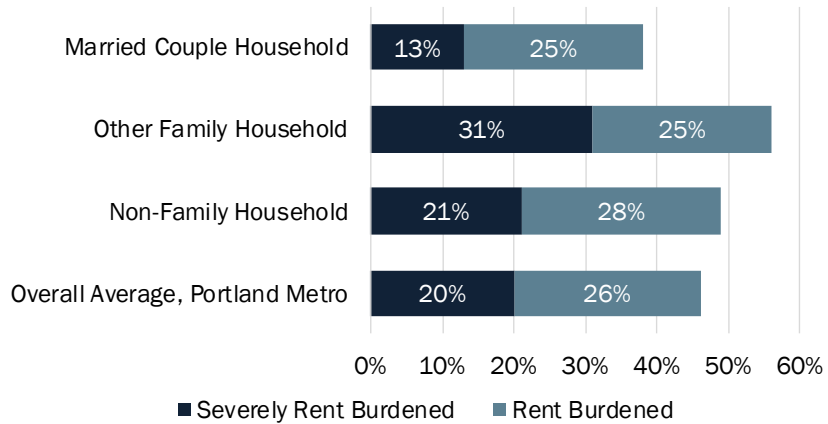


Exhibit 55. Cost-Burdened Renter Households, by Household Type, Portland Region, 2018

Source: US Census, 2018 ACS 1-Year PUMS Estimates. From the Report *Implementing a Regional Housing Needs Analysis Methodology in Oregon: Approach, Results, and Initial Recommendations* by ECONorthwest, March 2021.



Findings from Outreach and Engagement

The following is a summary of outreach and engagement efforts sponsored by the City of Tualatin in 2018 through 2020. The summary relates to matters of housing—and in particular, housing production. The following synthesizes the key findings of each effort.

- **Individual Interview (April 3, 2019).** As part of Tualatin’s 2040 engagement, the City of Tualatin interviewed a person with a physical disability. The interviewee identified several concerns related to accessibility—not only access to housing but access to parking, parks, street crossings, sidewalks, and other amenities. They indicated that people in wheelchairs require doors/entryways with suitable clearance, dwelling units on the first floor or within a structure with an elevator, park spaces without woodchips, sidewalks with space for passing (e.g., sandwich boards or tree root issues can make sidewalks inaccessible). They indicated concern with vision clearance regulations in the code—an important ADA safety and ongoing maintenance issue to evaluate. The interview identified a need to increase Tualatin’s supply of affordable housing options, particularly near grocery store options, as well as a need to address mold issues in apartments.⁶³
- **Summary of interviews with 15 participants from (April 1 to April 29, 2019) and a group stakeholder interview with Tualatin Aging Task Force (May 13, 2019).** Findings from the following group and individual interviews identified a concern for Tualatin’s lack of affordable and workforce housing. Participants showed support for a diversity of housing types to provide more affordable options. Housing types of interest included town homes and row houses, mixed-use development, duplexes, triplexes, and accessory dwelling units. Some participants also showed interest in high-rise apartments (structures that are six to eight stories in height) and concern for large housing types (i.e., McMansions).
- **Technical Advisory Committee Meetings for Tualatin’s HNA and EOA.** The City of Tualatin convened a Technical Advisory Committee (TAC) in April 2019 to provide input on the Housing Needs Analysis (HNA), Economic Needs Analysis (EOA), and related strategy documents. The TAC met four times with the last meeting held on September 25, 2019. The TAC focused on the technical approach and methodology for HNA and EOA. The TAC comprised City staff with expertise related to city planning and development code regulation as well as county, regional, and state agencies and experts in the housing and economic development field.

⁶³ The City of Tualatin has considered implementing a rental housing inspection program within the city, but none have been implemented to date. In general, newer rental housing in Tualatin is quite adequate, suggesting that housing quality may be more of a challenge for older buildings.

The City of Tualatin has, however, received four complaints for mold in 2019. Three complaints were in apartment buildings and one complaint at a rental house. Tualatin has no city ordinance to address mold, and those that submitted complaints were told to contact (or recontact) their property management/property owner, a mold abatement company, and/or legal counsel.

-
- **Community Advisory Committee Meetings for Tualatin’s HNA and EOA.** A 16-member Community Advisory Committee (CAC) was convened by the City of Tualatin in March 2019 to provide policy input on the HNA, EOA, and related strategy documents. The CAC met seven times with the last meeting held on September 26, 2019. The CAC provided input to guide the City’s housing and economic policies with a focus on developing strategies and actions that could lead to possible changes to the Comprehensive Plan and Development Code regulations. Desirable housing outcomes brainstormed by the CAC included:
 - Housing/jobs balance
 - Housing planning that is inclusive of all households
 - Variety of housing options
 - Multifamily opportunities
 - Complete neighborhoods - mixed-use
 - Flexible plan designations - universal design standards
 - Livability/walkability
 - Enable small-scale developers
 - Support for aging in place
 - Access to max/transit
 - Renter/homeowner affordability
 - More rental opportunities
 - Housing location and quality
 - Multigenerational housing
 - Flexible zoning standards
 - Think creatively about potential solutions to affordable housing issues
 - Address affordability

 - **Pop-up Event and Online Survey (July–August 2019):** In the summer of 2019, the City of Tualatin hosted a pop-event and disseminated an online survey to gather input on housing and non-housing-related concerns. Key findings of these efforts include:
 - Respondents identified three preferred actions to meet affordable housing needs: offer incentives for affordable housing, improve connections to jobs/services to reduce costs, and allow more types of homes. For households making \$50,000 and below, rent control and incentives for affordable housing were of great interest. For people of color, allowing more types of homes and obtaining land for new housing were of great interest.
 - Respondents’ top three desired choices for new housing types: small homes, town homes, cottage courtyard, in addition to work-from-home (home-business) arrangements. For households making \$50,000 and below, small homes and cottage courtyards were of great interest. For people of color, the greatest preference was for home-businesses and small homes.
 - Respondents’ top three non-housing priority topics were improving connectivity, increasing and protecting green space, and increasing opportunities for jobs and entertainment. For households making \$50,000 and below, the preference was increasing and protecting green space and increasing opportunities for jobs and entertainment. For people of color, it was improving connectivity and increasing opportunities for jobs and entertainment.

-
- **Under One Roof Luncheon (September 2019).** The City of Tualatin held two severely rent burdened public events. The Under One Roof Luncheon was the first event attended by 40 community members, representing a diverse group of people that included affordable housing residents, housing service providers, and elected officials. The event included a discussion with a panel of housing experts. The experts recommended the following actions for the City of Tualatin to address affordable housing needs: review what land is already in public control, reform the zoning (especially parking and density), and be ready for not-in-my-backyard (NIMBY) concerns. Luncheon participants agreed that affordable housing is a complex issue and a coalition is needed to address these issues. It was determined that the coalition should include housing experts and advocates within the community. The major theme from participant feedback was a desire to achieve greater land use efficiencies, accomplished by improving transportation connectivity or increasing the location of jobs, businesses, services, and green spaces near housing. During the question-and-answer portion of the event, community members commented on housing options and services that could be further explored: housing vouchers, shared/transitional housing, tiny homes, mobile or manufactured homes, and immediate assistance.
 - **Our Home, Our Health Event (September 2020).** Our Home, Our Health event was Tualatin’s second severely rent burdened event. It included a keynote speaker from the American Association of Retired Persons (AARP) in Oregon on the connection between housing and health and story sharing from two members of Tualatin’s Diversity Task Force. Participants expressed concerns for poor quality housing (e.g., conditions that lead to mold) and concerns for the City’s lack of affordable housing. Families are working multiple jobs and choosing between housing and food to get by. Participants commented on and shared possible solutions to these issues, which are summarized below:
 - Resolve issues related to legally undocumented persons residing in Tualatin.
 - Solve this problem: making a little too much money to qualify for assistance, yet not being able to survive on what you make.
 - Invite people of color in.
 - Ensure people are able to participate in programs without fear of being reported.
 - Provide local rental assistance.
 - Support new affordable housing.
 - Economically stabilize sites.
 - Implement rent control.
 - Enable shared housing options.
 - Relax regulations to support development of affordable housing.
 - Commit to livability and accessibility.

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- Continue to extend eviction moratorium.
 - Consider short and long-term solutions.
 - Solve for housing instability, which particularly has long-term impacts on children.

Key Terms in the HPS

This appendix presents applicable key terms used in Tualatin’s Contextualizing Housing Needs memorandum. Per the Department of Land Conservation and Development, the following key terms will be incorporated into the definitions section of OAR 660-008 (if they are not already):

- **Consumers of Needed Housing:** any person who inhabits or is anticipated to inhabit Needed Housing, as described in the definition of “Needed Housing” in ORS 197.303.
- **Housing Production Strategy Report:** the report cities must adopt within one year of their deadline to complete an updated Housing Capacity Analysis, pursuant to OAR 660-008-0050.
- **Housing Production Strategy:** a specific tool, action, policy, or measure a city will implement to meet the housing needs described in an adopted Housing Capacity Analysis. A Housing Production Strategy is one component of a Housing Production Strategy Report.
- **Needed Housing:** housing types determined to meet the need shown for housing within an urban growth boundary at particular price ranges and rent levels, including (but not limited to) renter and owner-occupied attached and detached single-family housing, multifamily housing, and manufactured homes.
- **Producers of Needed Housing:** developers, builders, service providers, or other persons or entities providing materials and funding needed to build housing. Producers of Needed Housing may include non-profit organizations or public entities.
- **Unmet Housing Needed:** occurs when housing need determined pursuant to ORS 197.296 (3)(b) is greater than the housing capacity (i.e., buildable, residential land is insufficient to accommodate demand for housing).

Appendix B: Construction Excise Tax Analysis

This appendix presents an analysis of a Construction Excise Tax (CET) for Tualatin.

DATE: February 17, 2021
TO: City of Tualatin
FROM: Becky Hewitt, Sadie DiNatale, and Angelica True, ECONorthwest
SUBJECT: Summary of Construction Excise Tax Analysis

The Department of Land Conservation and Development contracted ECONorthwest to develop a Housing Production Strategy (HPS) for the City of Tualatin. This memorandum presents preliminary research for one strategy of the HPS. The findings documented in this memorandum may later become a section or appendix of the final HPS report.

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

Construction Excise Tax

The City of Tualatin is considering a range of strategies and actions to meet its housing production goals. One such action is implementation of a Construction Excise Tax (CET). To understand the potential trade-offs of implementing a CET in Tualatin, this memorandum describes what a CET is and how it works. In addition, it summarizes an analysis of the potential revenue impacts of implementing a CET. The final section outlines potential next steps for the City of Tualatin to consider.

How It Works, Fiscal Impacts, Pros and Cons

How It Works

In 2016, the Oregon Legislature passed Senate Bill 1533, which permits cities to adopt a construction excise tax (CET) on the value of new construction projects to raise funds for affordable housing projects. The tax is limited to 1% of the permit value on residential construction with no cap on the rate applied to commercial and industrial construction. A number of cities of various sizes in Oregon have adopted a CET.

Construction Excise Tax:
Levies a tax on new construction projects to fund housing programs and/or investments. It can be applied to residential and/or commercial and industrial development.

The allowed uses for CET funding are defined by state statute:

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- The City may retain up to 4% of funds to cover administrative costs. The funds remaining must be allocated as follows, depending on whether the CET is on residential or commercial and industrial development:
 - For a residential CET:
 - 50% must be used for developer incentives (e.g., permit fee and SDC waivers,⁶⁴ tax abatements, or finance-based incentives). The City would have to offer incentives but could cover the costs or foregone revenues with CET funds.
 - 35% may be used flexibly for affordable housing programs, as defined by the jurisdiction.
 - 15% is not available to the city and flows instead to Oregon Housing and Community Services for homeownership programs that provide down payment assistance.
 - For a commercial/industrial CET:
 - 50% of the funds must be used for housing-related programs, as defined by the jurisdiction (note that these funds are not necessarily limited to affordable housing).
 - The remaining 50% is unrestricted.

Fiscal Impacts/Who Pays

The source for CET funds is new development. The statute exempts public buildings, regulated affordable housing, places of worship, public and private hospitals, agricultural buildings, nonprofit facilities, long-term care facilities, residential care facilities, and continuing care retirement communities.⁶⁵ The City can exempt other types of development if desired.

Pros and Cons

Pros:

- Offers the ability to link industrial or other employment investments, which generate new jobs and demand for new housing, with funding for housing development.
- CET is a flexible funding source, especially for funds derived from commercial/industrial development.
- Program funds can fund administration of the CET as well as staff time needed to administer programs funded by CET.

⁶⁴ Note that while these are called “waivers,” they are really subsidies, since the fees would still be paid by CET revenues rather than by the developer.

⁶⁵ Oregon Revised Statute 320.173

Cons:

- CET increases development costs in an environment where many developers are already seeking relief from system development charges. Depending on the rates imposed, CET could have an impact on feasibility. More research would be necessary to understand the potential magnitude of the impact.
- Where demand is high relative to supply, additional fees on residential development may be passed on to tenants or home buyers through higher housing costs.
- Because CET revenue is development derived, it will fluctuate with market cycles and will not be a steady source of revenue for affordable housing when limited development is occurring.

Summary of CET Analysis for Tualatin

This section summarizes ECONorthwest's CET analysis for Tualatin.

Estimating Revenue Potential

Methodology Overview

There is no statutory cap on the CET rate applied on commercial and industrial construction. Therefore, this analysis assumed a range of potential rates that the City could apply on this development type: 0.3%, 0.5%, 1%, and 2%. The CET rate applied on residential construction is capped at 1%. Therefore, this analysis assumed a range of potential rates that the City could apply on this development type under the 1% threshold: 0.3%, 0.5%, .75%, and 1%.

After establishing a range of rates, the analysis assessed what revenue would look like based on historical building permit values for each respective development type (i.e., commercial and industrial development over the last five years and residential development over the last five years).

Based on the statutory regulations about how the CET funds can be expended, we allocated the projected revenue forecasts as follows:

- **Commercial/Industrial Construction:** (1) 4% to administrative costs, (2) 50% of the balance after subtracting administrative costs to housing-related programs (i.e., 48% of the total), and (3) 50% of the balance after subtracting administrative costs to an unrestricted use (i.e., 48% of the total).
- **Residential Construction:** (1) 4% administrative costs, (2) 15% of the balance after subtracting administrative costs to OHCS (i.e., 14% of the total), (3) 35% of the balance after subtracting administrative costs to affordable housing programs (i.e., 34% of the total), and (4) 50% of the balance after subtracting administrative costs to developer incentives (i.e., 48% of the total).

Results: Historical Permit Values

One way to estimate CET revenue is a backward-looking analysis. If the City of Tualatin had charged CET fees on recent development that had occurred, how much revenue might have the City collected (assuming the permitting activity had been unchanged as a result of that CET)?

Building permits for residential development and commercial/industrial development in Tualatin fluctuated from year to year over the last five years. Exhibit 56 summarizes annual total permit values for new residential and commercial/industrial construction as well as additions that increase square feet (excluding exempt development) in 2020 dollars.⁶⁶ The annual average over the five-year period (2016-2020) for residential development is about **\$10m in qualifying permit value** in 2020 dollars. The annual average over the five-year period for commercial and industrial development is about **\$41.8m in qualifying permit value** in 2020 dollars.

Exhibit 56. Residential Building Permit and Commercial/Industrial Building Permit Values by Year (2016 to 2020), (in 2020 dollars)

Source: ECONorthwest analysis of City of Tualatin permit data.
 Note: The large bump in residential permit valuation in 2018 is primarily due to the City of Tualatin permitting an above-average number of residential developments (101 total permits in 2018, compared to 11, 12, 35, and 37 total permits in other years). The large bump in commercial/industrial valuation in 2020 is predominately due to a new industrial structure permitted on Blake Street with a permit value of \$90m (2020\$).

Year	Commercial and Industrial Building Permit Valuation (2020\$)	Residential Building Permit Valuation (2020\$)
2016	\$17,166,894	\$9,304,128
2017	\$11,042,600	\$6,270,048
2018	\$53,020,643	\$32,351,852
2019	\$14,918,542	\$1,257,071
2020	\$112,883,996	\$926,520
Annual Average	\$41,806,535	\$10,021,924
Total (2016-2020)	\$209,032,675	\$50,109,618

Next, the analysis calculated the revenue that the City would have generated if it had a CET in place during the 2016 to 2020 period (assuming the permitting activity had been unchanged as a result of that CET) using the different CET rates listed previously.

Exhibit 57 and Exhibit 58 show potential CET revenue for commercial/industrial development. This analysis shows that under the highest rate tested (2%), the average annual CET revenue over this period would have been about \$836,100.

⁶⁶ ECONorthwest used the Construction Cost Index published by Engineering News Record to inflate permit values to 2020 dollars.

Exhibit 59 and Exhibit 60 show potential CET revenue for residential development. This analysis shows that under the highest rate tested (1%), the average annual CET revenue over this period would have been about \$100,200.

Under either development type, the minimum CET revenue collected in a slow year would have varied little with the different rates, while the maximum collected in a “busy” year would have varied substantially.

Exhibit 57. Potential Annual Commercial/Industrial CET Revenue by Year and Rate (2016 to 2020)
 Source: ECONorthwest analysis of City of Tualatin permit data.

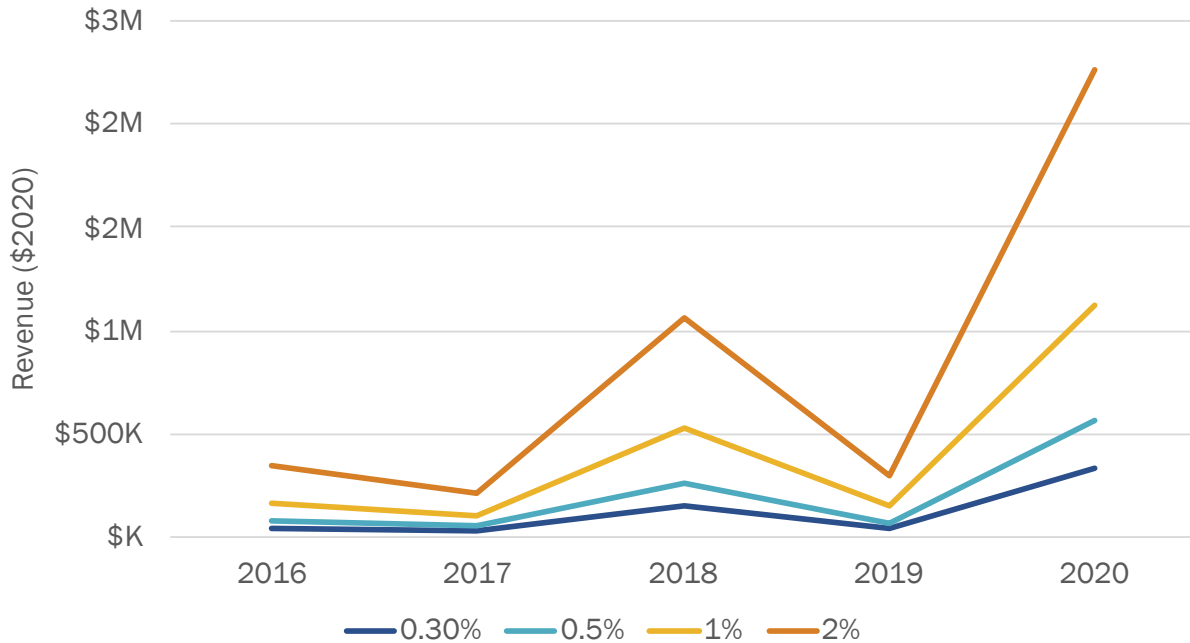


Exhibit 58. Historical Minimum, Maximum, and Average Annual Potential Commercial/Industrial CET Revenue by Rate (2016 to 2020)

Source: ECONorthwest analysis of City of Tualatin permit data.

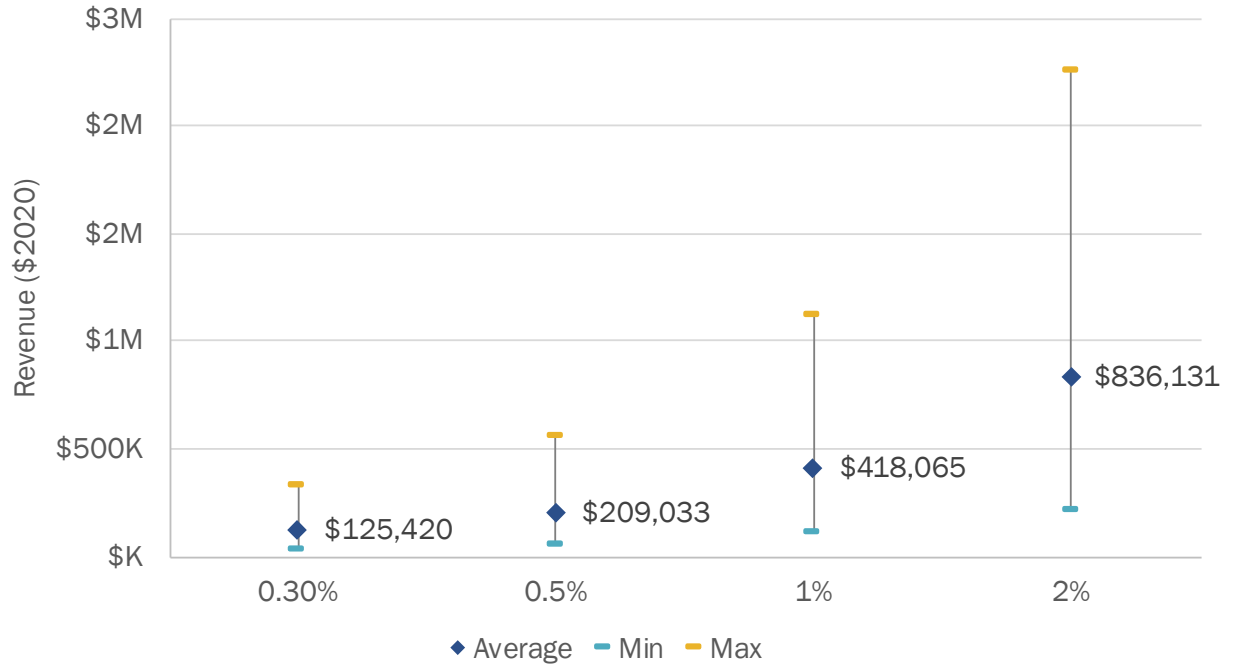


Exhibit 59. Potential Annual Residential CET Revenue by Year and Rate (2016 to 2020)

Source: ECONorthwest analysis of City of Tualatin permit data.

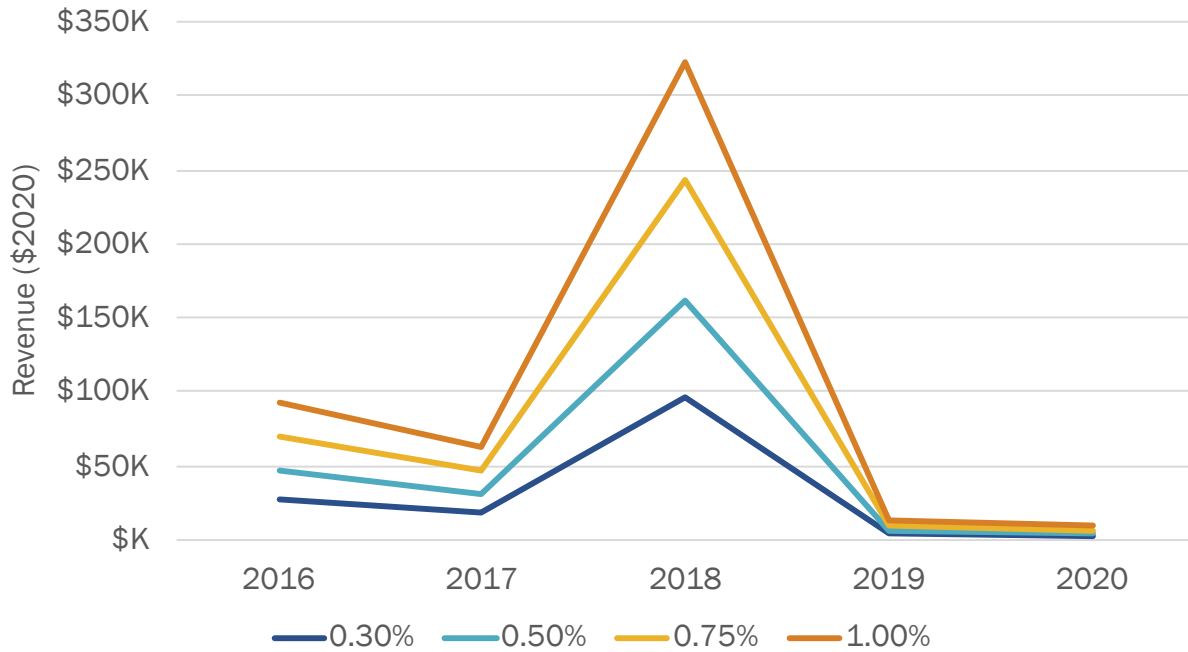
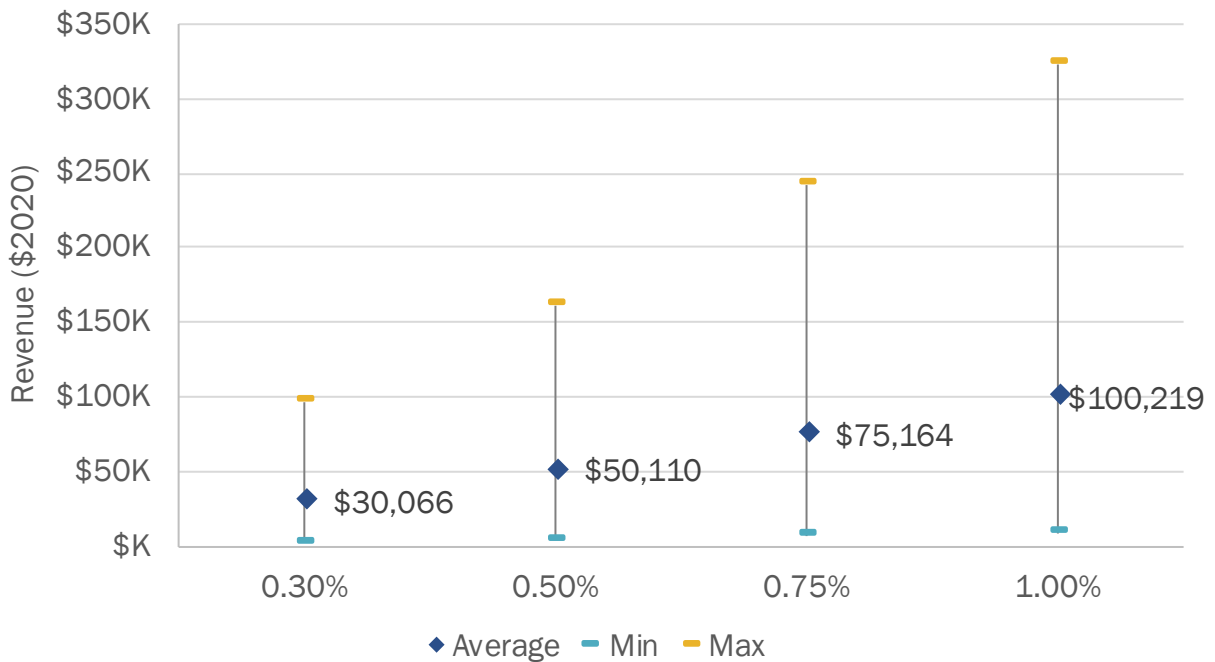


Exhibit 60. Historical Minimum, Maximum, and Average Annual Potential Residential CET Revenue by Rate (2016 to 2020)

Source: ECONorthwest analysis of City of Tualatin permit data.



Based on the statutory requirements about use of funds, ECONorthwest translated the average annual simulated CET collections between 2016 and 2020 into funds available for each funding category, as shown in Exhibit 61 and Exhibit 62.

Exhibit 61. Hypothetical Total Commercial/Industrial CET Revenue (2016 to 2020) by Rate and Use of Funds

Source: ECONorthwest analysis of City of Tualatin permit data.

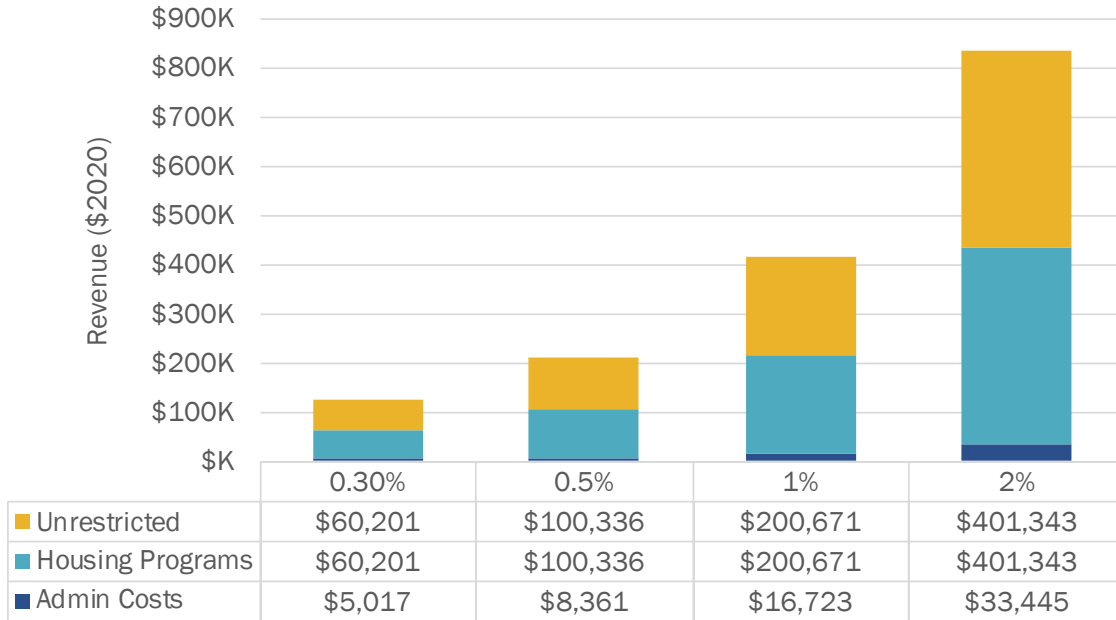
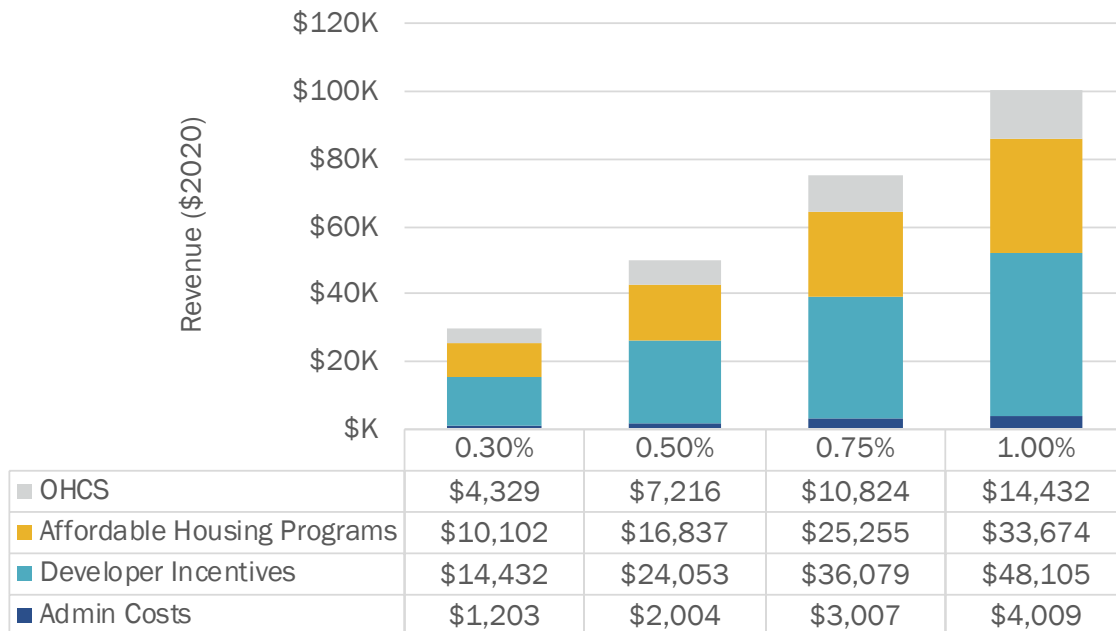


Exhibit 62. Hypothetical Total Residential CET Revenue (2016 to 2020) by Rate and Use of Funds

Source: ECONorthwest analysis of City of Tualatin permit data.



As shown above, a 0.5% or 1% rate on commercial and industrial development could generate meaningful revenue for programs, especially if the unrestricted portion is also dedicated toward housing programs. Because of the greater flexibility for these revenues, the City could design a flexible program for the revenues, or direct all of the net revenues towards a Housing Trust Fund or similar fund. This ease of use is important, because even with the higher revenue potential of the commercial/industrial CET, a 0.5% to 1% rate would offer little funding for administrative costs.

A CET on residential development would generate relatively little revenue given past trends in residential development, even at the maximum rate (1%). In addition, the administration would be more complex due to needing to separate out revenues toward the spending categories as specified in statute, while the funding available to cover administrative costs would be negligible.

Conclusions and Next Steps

Given the results summarized above, a 0.5% to 1% CET on commercial and industrial development may be worthwhile to consider as it could generate a flexible source of revenue for local housing programs, especially if the City continues to see strong industrial and commercial growth. Imposing a CET on residential development is likely not worth considering unless the City annexes a large amount of vacant residential land where higher-end new housing is expected.

If the City chooses to further evaluate adoption of a CET, it should conduct additional outreach to stakeholders and local businesses to offer an opportunity for discussion and to raise any concerns. The City should also advance conversations about the potential uses of the funds, even though this is flexible and does not necessarily need to be determined prior to adoption. Working with stakeholders to clearly define the program's intended purpose, how the funds (especially the unrestricted portion) would be used, and who would make decisions about the use of funds is likely to help build support for the program. If the City chooses to adopt a CET, it must pass an ordinance or resolution that states the rate and base of the tax. Most communities also identify any further self-imposed restrictions on the use of funds as part of adopting the ordinance. If the ordinance passes, the City must then establish a process to distribute the funds.

Madeleine Nelson

From: Madeleine Nelson
Sent: Monday, December 9, 2024 8:21 AM
To: Bob Taylor
Cc: Steve Koper
Subject: RE: Case File PMA 24-0004 concerns/comments from neighbor

Good Morning,

Thank you for your email. Your comments have been received and will be added to the public record, which will be presented to Council at the public hearing. The comments will also be shared with the applicant team.



Madeleine Nelson
Assistant Planner
Planning Division
Phone: 503.691.3027
tualatinoregon.gov

From: Bob Taylor <bob@materialcg.com>
Sent: Saturday, December 7, 2024 12:42 PM
To: Madeleine Nelson <mnelson@tualatin.gov>
Subject: Case File PMA 24-0004 concerns/comments from neighbor

Hello there, unfortunately I now have a conflict and will not be able to attend the Monday meeting at 7pm for the proposed project on Norwood Rd., therefore like to express a couple comments via email:

First to state that I do not consider myself a “nimby” and understand the need for more housing and quote “affordable housing”, so I’m not necessarily against this project in general. That said, being a nearby resident, I have a couple comments/concerns I hope will be considered:

- 1) The recent Lennar homes project (“Autum Sunrise”) promised a similar “tree preservation zone” – yet there was zero oversight when AKS engineering came in and completely thinned out those tall firs to the point that the first strong fall winds started blowing down the remaining fir trees and Lennar ended up getting what they really wanted, which was a winding sidewalk with grass and small little trees and visibility to all their homes – it was their plan all along and there was zero oversight (that was called a “tree preservation zone”, why was AKS in there cutting out more than half the trees if it was a “preservation zone”) – what was approved by the City was not what we delivered, Lennar & AKS lied and there was no oversight, accountability, fines nothing! This new proposal also has a “tree preservation zone” – is our neighborhood going to end up with another destruction of very nice, tall firs because of deceiving developers and lack of oversight?
- 2) Again, I fully understand the need for additional “affordable housing” and it’s obvious the City sees this south end of Town as a prime location to expand, what I’m not seeing or feeling in this (maybe I’m missing it) is a lack of any allocation for commercial space or effort to put in conditions to developers to include some amount of necessary commercial space – I’m not talking about “strip malls”, but some

small spaces for convenience store type, coffee shop etc... I believe would be very welcome to the community (jmho).

I appreciate your consideration,

Robert Taylor
22675 SW Vermillion Drive, Tualatin



CITY OF TUALATIN

Staff Report

TO: Honorable Mayor and Members of the City Council

THROUGH: Sherilyn Lombos, City Manager

FROM: Kevin R. McConnell, City Attorney
Richard Contreras, Contracts and Procurement Analyst

DATE: December 09, 2024

SUBJECT:

Consideration of Ordinance No. 1497-24, amending the City's Public Contracting Rules to increase certain procurement thresholds and the City Manager's authority to award City contracts

RECOMMENDATION:

City staff recommends approval of Ordinance No. 1497-24.

EXECUTIVE SUMMARY:

The City's Public Contracting Rules (TMC 1-21) contain the City's purchasing rules. The purchasing rules set out thresholds that specify when: i) the City can select any vendor (direct appointment); ii) the City must informally seek quotes from three vendors (intermediate procurement); or iii) the City must formally advertise a procurement in a trade newspaper (formal procurement).

The City's procurement thresholds have remained unchanged since 2009. In general, City staff can only award City contracts by direct appointment if the contract price is \$5,000 or under and may award City contracts by way of an intermediate procurement process if the contract price does not exceed \$150,000. Any City contract exceeding a contract price of \$150,000 requires a formal procurement process such as an Invitation to Bid or Request for Proposals and must be forwarded to Council for approval.

In 2009, the City procurement thresholds approved by Council generally aligned with state thresholds pertaining to public contracts for goods and services. In 2023, the Oregon Legislature enacted significant increases to state agency procurement thresholds. However, the City's stricter local thresholds would have to be amended by ordinance for City staff to apply those increased limits.

In an effort to account for 15 years' worth of inflation, increase efficiency and comply with the Council's stated intent in adopting the City's Public Contracting Rules, staff recommends the following amendments to the City's procurement thresholds:

Direct appointment:	City contracts up to \$25,000
Intermediate procurement:	City contracts over \$25,000 and up to \$250,000
Formal procurement:	City contracts over \$250,000

In addition, staff is recommending an increase to the procurement threshold limits for professional service consultants within the City's Qualified Pool. "Professional services" are a subset of personal services and encompass architectural, engineering, photogrammetric mapping, transportation planning, and land surveying services, along with related services. These can generally be thought of as personal services that pertain to the construction, maintenance, or planning of public improvements. Every two years, the City

establishes a qualified pool of professional consultants through a formal Request for Qualifications (RFQ) process, admitting those who meet the City's established standards into the pool.

Currently, the City has the authority to award professional service contracts up to \$100,000 by direct appointment to consultants who are not part of the Qualified Pool, in accordance with ORS 279C.110(10) and TMC 1-21-200(1)(b). For consultants within the Qualified Pool, the direct appointment threshold is \$150,000. The resulting difference between the \$150,000 threshold for selecting professional consultants from the Qualified Pool and the \$100,000 threshold for those who are not members is relatively small. To maximize the advantages of conducting a formal RFQ process, an option for the Council's consideration is to increase the direct appointment threshold for consultants in the Qualified Pool to \$250,000, while keeping the direct appointment threshold for any consultant unchanged at \$100,000.

Finally, City staff recommend increasing the City Manager's authority to award City contracts in an amount not to exceed \$250,000. Currently, the Manager may award a City contract in an amount not exceeding \$150,000, which has remained unchanged since 2009. Increasing the Manager's authority will streamline the procurement process, reduce administrative delays, and enable the City to respond more efficiently to community needs.

OUTCOMES OF DECISION:

Approval of Ordinance No. 1479-24 will authorize City staff to award specified City contracts by direct appointment for City contracts up to \$25,000 and by way of an intermediate procurement process for City contracts over \$25,000 and up to \$250,000. City contracts exceeding \$250,000 will require City staff to engage in a formal procurement process and Council approval. In addition, the Ordinance will increase to the procurement threshold limits for professional service consultants within the City's Qualified Pool from \$150,000 to \$250,000. Finally, the Ordinance will authorize the City Manager's to award and execute City contracts in an amount not to exceed \$250,000.

ALTERNATIVES TO RECOMMENDATION:

Denial of the Ordinance will maintain the City's current procurement thresholds and City Manager's authority to award contracts as set out in the Public Contracting Rules.

ATTACHMENTS:

- Ordinance No. 1497-24
- PowerPoint Presentation

ORDINANCE NO. 1497-24

AN ORDINANCE RELATING TO PUBLIC CONTRACTS; INCREASING CERTAIN PROCUREMENT THRESHOLDS AND CITY MANAGER AUTHORITY TO AWARD CITY CONTRACTS; AND AMENDING TMC CHAPTER 1-21.

WHEREAS, TMC 1-21 contains the City's Public Contracting Rules (the Rules);

WHEREAS, the Tualatin City Council serves as the City's contract review board and contracting agency under Oregon State law;

WHEREAS, the Rules contain the City's purchasing rules, which set out thresholds that specify when: i) the City can select any vendor (direct appointment); ii) the City must informally seek quotes from three vendors (intermediate procurement); or iii) the City must formally advertise a procurement in a trade newspaper (formal procurement);

WHEREAS, the Rules limit the City Manager's authority to award City contracts without first seeking Council authorization; and

WHEREAS, the Tualatin City Council finds that the proposed amendments to the Rules are in the best interest of the City, the business community and the public and work to streamline the procurement process, reduce administrative delays and enable the City to respond more efficiently to community needs.

THE CITY OF TUALATIN, OREGON ORDAINS AS FOLLOWS:

Section 1. TMC 1-21 is amended to read as follows:

TMC 1-21-070- Public Contracts- Authority of Purchasing Manager.

- (1) *General Authority.* The City Manager shall be the Purchasing Manager for the City and is authorized to issue all solicitations and to award all City contracts for which the contract price does not exceed ~~\$150,000.00~~ **\$250,000.00**. Subject to this chapter, the Purchasing Manager may adopt and amend all solicitation materials, contracts and forms required or permitted to be adopted by contracting agencies under the Oregon Public Contracting Code or otherwise convenient for the City's contracting needs. The Purchasing Manager shall hear all solicitation and award protests.

TMC 1-21-080- Public Contracts Definition.

Intermediate Procurement means a procurement of goods or services exceeding ~~\$5,000.00~~ **\$25,000.00** but not exceeding ~~\$150,000.00~~ **\$250,000.00**.

TMC 1-21-100 Contracts up to ~~\$5,000.00~~ **\$25,000.00.**

For contracts of any type for which the contract price does not exceed ~~\$5,000.00~~ **\$25,000.00**, the Solicitation Agent may use any method that the Solicitation Agent deems appropriate to the City's needs, including direct appointment or purchase, without a record of the method of award.

TMC 1-21-110- Solicitation Methods for Classes of Contracts.

- (3) *Personal Services Contracts.* Except as otherwise provided in these rules, personal services contracts may be awarded in the same manner as contracts for services under ORS 279B.050 and 279B.060 to 279B.085.

(b) Contracts for personal services for which the estimated contract price does not exceed ~~\$100,000.00~~ **\$250,000.00** may be awarded using an informal solicitation for proposals. When informal solicitation is used under this subsection for personal services, the Solicitation Agent shall consider, but not be limited to, the person's (or persons'):

- (i) Professional expertise;
- (ii) Experience related to the particular type of work for that contract;
- (iii) Experience in working with public entities;
- (iv) History of completing such tasks in a timely manner;
- (v) Ability to work with the employees and groups involved in the project; and
- (vi) Price of services.

(c) Contracts for personal services for which the estimated contract price does not exceed ~~\$150,000.00~~ **\$250,000.00** may be awarded by direct appointment without competition from a Qualified Pool.

(d) Contracts for which the Solicitation Agent estimates that payments will not exceed ~~\$20,000.00~~ **\$25,000.00** in any fiscal year may be awarded under any method deemed in the City's best interest by the Solicitation Agent, including by direct appointment.

(e) Personal Service Contracts of not more than ~~\$100,000.00~~ **\$250,000.00** for the continuation of work by a contractor who performed preliminary studies, analysis or planning for the work under a prior contract may be awarded without competition if the prior contract was awarded under a competitive process and the Purchasing Manager determines that use of the original contractor will significantly reduce the costs of, or risks associated with, the work.

(5) *Contracts for Goods and Services.*

(b) Intermediate Procurements up to ~~\$150,000.00~~ **\$250,000.00**. The procurement of goods or services, or goods and services, for which the estimated contract price does not exceed ~~\$150,000.00~~ **\$250,000.00**, may be made under an informal solicitation for either quotes or proposals. A procurement may not be artificially divided or fragmented so as to constitute an intermediate procurement under this section.

(6) The following classes of contracts may be awarded in any manner that the Solicitation Agent deems appropriate to the City's needs, including by direct appointment or purchase. Except where otherwise provided, the Solicitation Agent shall make a record of the method of award.

(d) Contracts of any type for which the contract price does not exceed ~~\$5,000.00~~ **\$25,000.00** without a record of the method of award.

Section 2. Severability. Each section of this ordinance, and any part thereof, is severable. If any part of this ordinance is held invalid by a court of competent jurisdiction, the remainder of this ordinance shall remain in full force and effect.

Section 3. All other provisions and subsections of TMC 1-21 shall remain unchanged and in full force and effect.

Section 4. Effective Date. As provided in the Tualatin Charter, this ordinance is effective 30 days from the date of adoption.

INTRODUCED AND ADOPTED this 9th day of December, 2024.

CITY OF TUALATIN, Oregon

BY _____
Mayor

ATTEST:

BY: _____
City Recorder

APPROVED AS TO FORM:

BY: _____
City Attorney



An Ordinance Relating to Public Contracts; Increasing Certain Procurement Thresholds; and Amending TMC 1-21

2024

Current City Thresholds

The City's local contracting rules were last updated in 2009 and they matched the State of Oregon thresholds in effect at the time:

Direct Appointment (\$5,000 and under)

Allows for a non-competitively bid contract to be issued. City staff can quickly secure goods and services they need.



Intermediate Procurement (\$5,001 - \$150,000)

Requires more process and competition. City staff must seek three quotes and may do so informally via phone or e-mail. Takes 30-days.



Formal Procurement (over \$150,000)

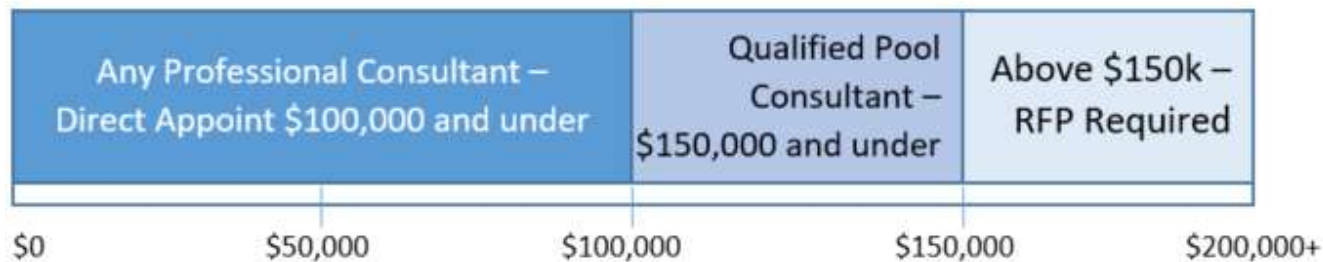
A formal Invitation to Bid or Request for Proposals is required, posted in the Daily Journal of Commerce, with formal evaluations and complex contract negotiation. Takes 4-6 months.



CITY of
TUALATIN

Professional Services- Qualified Pool

- Professional Services are a special type of Personal Service (architectural, engineering, and related consulting services for the design or management of a public improvement).
- Every two years, the City establishes a Qualified Pool of Professional Services Consultants, and City staff can direct appoint any consultant within the Qualified Pool up to \$150,000.
- The Qualified Pool is the result of a publicly advertised Request for Qualifications that takes over 200 hours of staff time to conduct (we received applications from 59 for multiple categories of services)
- *Outside the Pool:* City Staff are authorized to award Professional Services Agreements via direct appointment up to \$100,000 per state and local contracting rules for a consultant *outside* of the Qualified Pool.



CITY of
TUALATIN

City Manager's Contracting Authority



- The City Manager is currently authorized to award and sign contracts that do not exceed \$150,000. This threshold was set by the Council in 2009, and matched the State of Oregon intermediate procurement threshold in effect at the time.
- The City Manager's contracting authority applies regardless of the procurement method used.
- The City Manager's contracting authority only applies if it is within budgeted amounts as approved by the City Council.



CITY of
TUALATIN

Proposed Changes



Direct Appointment
(\$25,000 and under)

Allows for a non-competitively bid contract to be issued. Agencies can quickly secure goods and services they need.



Intermediate Procurement
(\$25,001 - \$250,000)

Requires more process & competition. At minimum, agencies must post 7-days publicly, and take active steps to include small & diverse firms. Takes 30-days.

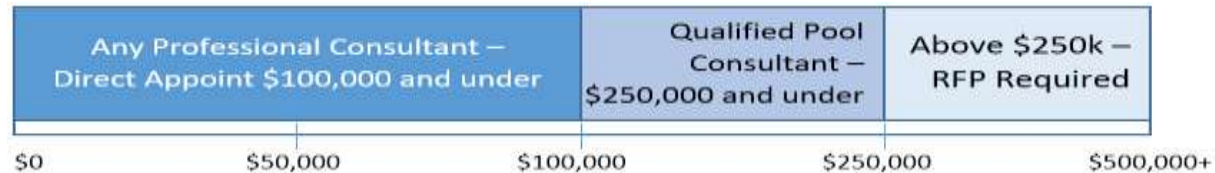


Formal Procurement
(over \$250,000)

Rigorous process of formal solicitation documents (usually with DOJ review), 30-day public posting, formal process steps & evaluations & complex contract negotiation. Takes 4-6 months.



- **Professional Services:** Increase to \$250,000 for Direct Appointment from the Qualified Pool:



- **City Manager’s Authority:** Increase to \$250,000 to align with the Intermediate Procurement threshold if increased to \$250,000.



CITY of
TUALATIN

Conclusion

- The proposed ordinance would amend the City's local contracting rules to increase the procurement thresholds we have discussed.
- If the ordinance is approved, the Legal Department will train all City staff involved in procurement on specifically which thresholds have been increased, so that our purchases will remain compliant with State of Oregon and local contracting rules.
- City staff will continue to be responsible stewards of public funds.





CITY OF TUALATIN

Staff Report

TO: Honorable Mayor and Members of the City Council

THROUGH: Sherilyn Lombos, City Manager

FROM: Don Hudson, Assistant City Manager/Finance Director

DATE: December 9, 2024

SUBJECT:

Consideration of Resolution No. 5823-24, A Resolution Adopting the Updated City of Tualatin Financial Policies Manual

RECOMMENDATION:

Staff recommends approval of Resolution No. 5823-24, Adopting the Updated City of Tualatin Financial Policies Manual.

EXECUTIVE SUMMARY:

Financial policies are vital to a strategic, long-term approach to financial management, and to achieve and maintain a stable and positive financial position while ensuring the financial integrity of City operations. They are used as a guideline for operational decision making and maintaining a fiscally prudent budget, while carrying out the needs and wants of the City of Tualatin and its residents. They also establish a framework for planning and decision making to meet the City's goal of maintaining an adequate financial base to sustain the desired level of services the community has come to know and expect from the City. In addition, the attached policies provide guidelines for managing financial risk and assisting the City in complying with established public financial management best practices, as well as federal, state and local legal and reporting requirements.

The goals of the City's Financial Policies are to:

1. Provide an adequate financial base to sustain the desired level of municipal services.
2. Deliver cost effective and efficient services to our residents.
3. Provide and maintain essential public facilities, utilities and capital equipment.
4. Protect and enhance the City's credit rating so as to obtain the lowest cost of borrowing and assure taxpayers and the financial community that the City is well managed and financially sound.
5. Provide the financial stability needed to navigate through economic downturns, adjust to changes in the service requirements of the community and respond to other changes as they affect the City's residents and businesses.
6. Adhere to the highest standards of financial management and reporting practices as set by the Government Finance Officers Association, the Governmental Accounting Standards Board and other professional standards.
7. Comply with finance related legal mandates, laws and regulations.

To achieve these goals, the City has adopted the following nine policies:

1. Revenue Policy
2. Operating Budget Policy
3. Expenditure Policy
4. Capital Improvement Plan Policy
5. Investment Policy
6. Contingency and Reserve Policy
7. Capital Asset Management Policy
8. Accounting, Auditing & Financial Reporting Policy
9. Debt Policy

These policies will be reviewed by management annually and amended as necessary.

The Financial Policies Manual was last adopted by the City Council in May 2017. Since that time, the Contingency and Reserve Policy was updated and adopted by the City Council in August 2023. Additionally, the City's Investment Policy is adopted by the City Council annually and was last adopted in October 2024.

Staff is asking the City Council to adopt the attached manual, which incorporates these previously updated policies and approve the following changes:

- In the Capital Asset Management Policy, we are proposing increasing the capital asset threshold from \$5,000 to \$10,000 to match updated best practices adopted by the Government Finance Officers Association.
- In the Accounting, Auditing & Financial Reporting Policy, we propose to change the title of the City's annual financial report from "Comprehensive Annual Financial Report" to "Annual Comprehensive Financial Report", to comply with changes adopted by the Governmental Accounting Standards Board.

Along with the updated investment policy, language referencing the annual adoption of the policy and the incorporation of the annual policy into this manual has been added.

Any future policies adopted separately by the City Council will be incorporated into this manual, upon adoption of the policy.

ATTACHMENTS:

- Resolution No. 5823-24
- Financial Policies Manual

RESOLUTION NO. 5823-24

A RESOLUTION ADOPTING THE UPDATED CITY OF TUALATIN FINANCIAL POLICIES MANUAL.

WHEREAS, financial policies are vital to a strategic, long-term approach to financial management; and

WHEREAS, financial policies help achieve and maintain a stable and positive financial position while ensuring the financial integrity of City operations; and

WHEREAS, financial policies establish a framework for planning and decision making to meet the City’s goal of maintaining an adequate financial base to sustain the desired level of services citizens have come to know and expect; and

WHEREAS, financial policies provide guidelines for managing risk and assisting the City in complying with established public management best practices, while ensuring compliance with federal, state and local legal and reporting requirements; and

WHEREAS, the Financial Policies Manual was adopted by the City Council in May 2017; and

NOW THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF TUALATIN, OREGON, that:

Section 1. The attached updated Financial Polices Manual incorporates changes made to financial policies since May 2017 and is hereby adopted to achieve the financial goals listed in the purpose section of the manual.

Section 2. This resolution is effective upon adoption.

INTRODUCED AND ADOPTED this 9th day of December, 2024.

CITY OF TUALATIN OREGON

BY _____
Mayor

APPROVED AS TO LEGAL FORM

ATTEST

BY _____
City Attorney

BY _____
City Recorder

City of Tualatin



Financial Policies

“Dedicated to being Good Stewards of Public Funds”



Updated December 9, 2024

Financial Policies

City of Tualatin's Financial Policies

Purpose

Financial policies are vital to a strategic, long-term approach to financial management, and to achieve and maintain a stable and positive financial position while ensuring the financial integrity of City operations. They are used as a guideline for operational decision making and maintaining a fiscally prudent budget while carrying out the needs and wants of the City of Tualatin and its residents. These policies establish parameters in which we operate while providing a standard against which our fiscal performance can be judged.

Financial policies also establish a framework for planning and decision making to meet the City's goal of maintaining an adequate financial base to sustain the desired level of services residents have come to know and expect. It provides guidelines for managing risk and assisting the City in complying with established public management best practices, while ensuring compliance with federal, state, and local legal and reporting requirements.

These policies are adopted to achieve the following general financial goals:

1. Provide an adequate financial base to sustain the desired level of municipal services.
2. Deliver cost effective and efficient services to our residents.
3. Provide and maintain essential public facilities, utilities, and capital equipment.
4. Protect and enhance the City's credit rating so as to obtain the lowest cost of borrowing and assure taxpayers and the financial community that the City is well managed and financially sound.
5. Provide the financial stability needed to navigate through economic downturns, adjust to changes in the service requirements of the community and respond to other changes as they affect the City's residents and businesses.
6. Adhere to the highest standards of financial management and reporting practices as set by the Government Finance Officers Association, the Governmental Accounting Standards Board and other professional standards.
7. Comply with finance related legal mandates, laws and regulations.

To achieve these goals, fiscal policies generally cover areas of revenue management, operating and capital budgeting, financial planning and forecasting, investment and asset management, debt

management, accounting and financial reporting, reserves and internal controls. The following policies are adopted by the City Council, reviewed annually by management and amended as necessary.

I. Revenue Policy

The goal of the Revenue Policy is to create and maintain a diversified and stable revenue system to mitigate the impact of short-term fluctuations in any revenue source and provide a stable revenue stream to support City services.

1. Significant one-time and or temporary revenue sources will not be used to fund continuing programs and services, but rather to fund one-time, or intermittent, expenditures.
2. The City will establish user fees for services that can be identified and where costs are directly related to the level of service provided and to the cost of providing the service. User fees will be reviewed on an established periodic basis.
 - a. Charges for providing utility services shall be sufficient to finance all operating, capital outlay and debt service expenses of the City's utility funds, including operating contingency, reserve requirements and capital replacement.
 - b. User charges shall be sufficient to finance the City's costs to perform development review and building activities.
 - c. Other reimbursable work performed by the City (full labor costs, overhead, contracted services, equipment and other indirect expenses) should be billed at total actual or estimated total actual cost.
 - d. Charges for services will accurately reflect the total actual or estimated cost of providing a specific service. The cost of providing specific services will be recalculated periodically, and the fee adjusted accordingly. The City will maintain a current schedule of fees.
 - e. The City will consider market rates and charges levied by other municipalities of similar size for like services in establishing rates, fees and charges.
3. The City will pursue an aggressive policy of collecting delinquent accounts. When necessary, discontinuing service, collection agencies, liens and other methods of collection, such as imposing penalties, collection and late charges, may be used.
4. All potential grants that require matching funds, on-going resource requirements, or include new or additional continuing compliance requirements shall be evaluated and considered before submittal of the application. Approval by the City Manager shall be obtained, prior to the submittal of an application.

5. Revenues will be estimated realistically and prudently. Revenue of a volatile nature will be estimated conservatively. The City will estimate its revenues by an objective, analytical process using best practices as defined by the Government Finance Officers Association, or other reliable sources.

II. Operating Budget Policy

The City shall prepare, present, adopt and amend its operating budget in accordance with Oregon Local Budget Law.

1. The City will prepare the budget with participation by all departments, guided by City Council goals and the work plan to accomplish these goals.
2. A budget calendar will be prepared with key elements/deadlines in the development of the budget.
3. Departmental objectives will be integrated into the City's annual budget.
4. The City shall maintain a budget system to monitor revenue and expenditures on an ongoing basis with adjustments made as necessary.
5. The amount of funding available will be determined for each fund. The budget will be developed based upon expected revenues.
6. Budget Committee meetings will be advertised and posted, as required by Oregon Budget Law, and on the City's website, as well as the public hearing to adopt the City's budget.
7. The City Manager shall present a proposed budget to the Budget Committee for evaluation and approval before sending the Approved Budget to the City Council for adoption.
8. Budgetary procedures shall conform to state regulations and generally accepted accounting principles.
9. Budget amendments will be prepared by the Finance Director, under the direction of the City Manager, to ensure compliance with Oregon Budget Law.

III. Expenditure Policy

The City will prioritize services, establish appropriate service levels, and manage the expenditure of available resources while ensuring fiscal stability and providing necessary services.

1. Expenditures will be controlled through appropriate internal controls and procedures. Management must ensure expenditures comply with the legally adopted budget. Each Department or Division Manager or Director will be responsible for the administration of his/her department/program budget. This includes accomplishing the goals and objectives

incorporated into the budget and monitoring each department/division budget for compliance with spending limitations

2. All purchases of goods and services must comply with the City's Purchasing Policies, guidelines and procedures and with State laws and regulations.
3. Staff will make every effort to control expenditures to ensure City services and programs provided to its citizens and taxpayers are cost effective and efficient. Expenditures that will reduce future costs will be encouraged.
4. Staff will make every effort to maximize any discounts offered by vendors, and will use competitive bidding and/or the Oregon Cooperative Procurement Program when considering purchases.
5. All compensation planning and collective bargaining will include analyses of total cost of compensation, which includes analysis of salary increases, health benefits, pension contributions, and other fringe benefits. City management will only propose operating personnel costs that can be supported by continuing operating revenues.

IV. Capital Improvement Plan Policy

The goal of this policy is to provide guidelines for annually reviewing and monitoring the City's Capital Improvement Plan, and monitoring the state of the City's capital equipment and infrastructure, and setting priorities for its replacement and renovation based on needs, funding alternatives, and availability of resources.

1. The City will complete a Capital Improvement Plan (CIP) for capital improvements, update it annually and will use the CIP as a planning tool for capital improvements to be programmed into the annual budget.
2. The CIP will be used as a financial planning tool to fund future capital projects, improvements and purchases.
3. Each project will include the need, scope of work, total cost estimates, and future operating and maintenance costs (if applicable and available).
4. The City will maintain its physical assets at a level adequate to protect the City's capital investment and to minimize future maintenance and replacements costs.
5. Each year, an internal CIP committee will evaluate the list of proposed CIP projects and determine which projects to recommend to the City Manager and Finance Department for inclusion in the annual budget.

V. Investment Policy

The purpose of this policy is to guide the investment of the City's operating cash to ensure its legality, safety, provide for necessary liquidity, avoid imprudent risk, and optimize yield, while meeting the requirements of Oregon Revised Statutes (ORS) 294.035.

The City's Investment Policy is adopted annually by the City Council. Annual updates will be incorporated into the Financial Policies Manual when adopted.

See Attachment A for the full Investment Policy, as approved by the Oregon Short Term Fund Board, and adopted by the Tualatin City Council.

VI. Contingency and Reserve Policy

The purpose of this policy is to ensure that the City maintains a prudent level of financial resources to protect against the need to reduce service levels due to temporary revenue shortfalls or unpredicted one-time expenditures.

1. The City will maintain fund balances of the various operating funds of the City at adequate levels to mitigate current and future risks from revenue shortfalls or unanticipated expenditures and at levels sufficient to protect the City's creditworthiness as well as its financial position from unforeseeable emergencies.
2. The City shall establish a contingency to provide for unanticipated expenditures of a nonrecurring nature to meet unexpected increases in service delivery costs. In accordance with local budget law in the State of Oregon, the contingency must be an appropriated budget item, though funds may not be directly disbursed from the contingency account. Amounts must be reclassified into another appropriation of a fund by resolution or through a supplemental budget process. The City shall maintain minimum contingency amounts for the following funds:
 - a. General Fund – 15% of total expenditures
 - b. Building Fund and all Utility Funds – 15% of total expenditures
 - c. Capital Project Funds – 15% of total expenditures, or net balance of the fund
3. Unappropriated Fund Balances are amounts that are set aside for future years and cannot be transferred by resolution or appropriated through a supplemental budget, unless necessitated by a qualifying emergency as defined in Oregon Revised Statutes (ORS) 294.481. Reserves for Future Expenditure are amounts that are planned to be saved for use in future fiscal years. If the need arises during the fiscal year to spend reserves, a supplemental budget may be

adopted to appropriate the expenditure, as defined in ORS 294.471. The City should maintain the following as either Unappropriated Fund Balances or Reserves for Future Expenditures:

- a. General Fund – 10% of total appropriations to provide the City with the necessary working capital until property tax receipts are received from the County Treasurer in November.
 - b. Building Fund – net balance of building related fees, as per ORS 455.210
 - i. Due to fluctuations in development related activity year-to-year, the target for total reserves and contingencies should be 18 months of operating expenditures,
 - c. Utility Funds – net balance of fund
4. Other individual funds may have contingency or reserve requirements set by the Tualatin Municipal Code, State Statutes, Bond Covenants or other legally binding documents.

The amounts recommended above may be exceeded as circumstances warrant due to special operational or capital project needs, but the City will adhere to the policy that expenditures which are anticipated, expected to occur during the fiscal year and can reasonably be ascertained and estimated, should be part of the basic budgeted appropriations.

VII. Capital Asset Management Policy

This policy addresses capital asset planning, acquisition, funding and management in order to ensure fiscally responsible stewardship.

1. The City will maintain its physical assets at a level adequate to protect the city's capital investments and to minimize future operating costs.
2. The City will determine the most cost effective funding method for its capital projects and will obtain grants, contributions and alternative sources of funding when possible.
3. To the extent allowed by law, system development charges will be designed to recapture from new private development the full cost of community assets in place at the time for the development and the necessary expansion of those systems caused by increased demand on those assets.
4. The capitalization threshold used in determining if a given asset qualifies for capitalization is \$10,000 per item.
5. The Finance Department will maintain a capital asset inventory.
6. Adequate insurance shall be maintained on all capital assets.

VIII. Accounting, Auditing & Financial Reporting Policy

The City shall comply with federal, state, and local statutes and regulations and conform to generally accepted accounting practices as promulgated by the Governmental Accounting Standards Board (GASB), The American Institute of Certified Public Accountants (AICPA), and the Government Finance Officers Association (GFOA).

1. The Finance Director and staff will prepare and present regular reports that analyze, evaluate, and forecast the City's financial and economic conditions.
2. Monthly financial statements will be provided to all departments for their review.
3. Internal controls and procedures will be maintained.
4. An annual audit shall be performed by an independent public accounting firm, which will issue an opinion on the Annual Comprehensive Financial Report (ACFR), along with a management letter identifying areas needing improvement, if necessary.
5. The City will submit the ACFR to the GFOA for its "Certificate of Achievement for Excellence in Financial Reporting" program.
6. The City will issue annual financial reports in accordance with generally accepted accounting principles (GAAP) as outlined in the Governmental Accounting, Auditing of Financial Reporting (GAAFR) publication.

IX. Debt Policy

This policy establishes guidelines for debt financing that will provide needed capital equipment and infrastructure improvements while minimizing the impact of debt payments on current revenues.

1. The Finance Director will structure all debt issuances and oversee the on-going management of all City debt. Debt includes general obligation bonds, lease purchase obligations, revenue bonds, special assessment obligations, promissory notes, equipment financing agreements and any other contractual agreements that obligate the City to make future principal and interest payments.
2. Capital projects financed through the issuance of bonds shall not be financed for a period which exceeds the useful life of the project.
3. The City will strive to maintain its high bond rating, and will receive credit ratings on all its bond issues.
4. No debt shall be issued for which the City has not identified specific revenue sources sufficient for repayment. The Finance Director shall prepare an analysis of the source of repayment prior to issuance of any debt.

5. The City will not use long-term debt to fund current operations, to balance the budget or to fund projects that can be funded from current resources, unless the debt is otherwise determined to be in the best interest of the City.
6. The City may utilize short-term debt or inter-fund loans as permitted, to cover temporary cash flow deficiencies due to timing of cash flows.
7. The City shall ensure that its debt margins are within the 3% RMV (real market value) limitation as set forth in ORS 287A.004§2.



**INVESTMENT POLICY
2024**

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1. INTRODUCTION

The purpose of this Investment Policy is to establish the investment objectives, delegation of authority, standards of prudence, eligible investments and transactions, internal controls, reporting requirements, and safekeeping and custodial procedures necessary for the prudent management and investment of the funds of the City of Tualatin.

2. GOVERNING AUTHORITY

The investment program shall be operated in conformance with federal, state, and other legal requirements. Specifically, this investment policy is written in conformance with ORS 294.035; 294.040; 294.052; 294.135; 294.145 and 294.810. All funds within the scope of this policy are subject to regulations established by the state of Oregon. Any revisions or extensions of these sections of the ORS shall be assumed to be part of this Investment Policy immediately upon being enacted.

This Policy has been adopted by Resolution No. 5817-24 by the City Council of Tualatin, Oregon on October 28, 2024.

3. SCOPE

This policy applies to activities of the City with regards to investing the financial assets of all funds except for funds held in trust for the Pension Portfolio and deferred compensation funds for the employees of the City which have separate rules. Other than bond proceeds or other unusual situations, the total of all funds ranges from \$70,000,000 to \$110,000,000. This policy provides direction for the following fund types:

1. General Fund
2. Special Revenue Funds
3. Capital Projects Funds
4. Debt Service Funds
5. Enterprise Funds
6. Internal Service Funds
7. Trust and Agency Funds
8. Other Funds

4. OBJECTIVES

The City's principal investment objectives in order of priority are:

4.1 Safety:

- Preservation of capital and protection of investment principal.
- Diversification to avoid incurring unreasonable risks regarding specific security types or individual financial institutions.

4.2 Liquidity:

- Maintenance of sufficient liquidity to meet operating requirements that are reasonably anticipated.

4.3 Yield – Return:

- Attainment of a market value rate of return throughout budgetary and economic cycles.

5. STANDARDS OF CARE

5.1 Delegation of Authority

- a. **Governing Body:** The ultimate fiduciary responsibility and authority for the investment of City funds resides with the City Council. The City hereby designates the Finance Director as the Investment Officer for the City's funds. The Finance Director shall invest City funds in accordance with ORS Chapter 294, Public Financial Administration, and with this Investment Policy. This Policy shall constitute a "written order" from City Council per ORS 294.035.
- b. **Investment Advisor:** Subject to required procurement procedures, the City may engage the support services of outside professionals in regard to its financial program, so long as it can be demonstrated or anticipated that these services produce a net financial advantage or necessary financial protection of the City's resources. External investment advisors shall be subject to Oregon Revised Statutes and the provisions of this Investment Policy. The Advisor shall provide non-discretionary advisory services, which require prior approval from the Finance Director on all transactions.

In order to optimize total return through active portfolio management, resources shall be allocated to the cash management program. This commitment of resources shall include financial and staffing considerations.

5.2 Prudence:

The standard of prudence to be used, by the Finance Director, in the context of managing the overall portfolio is the prudent person rule which states:

"Investments will be made with judgment and care, under circumstances then prevailing, which persons of prudence, discretion and intelligence exercise in the management of their own affairs, not for speculation, but for investment, considering the probable safety of their capital as well as the probable income to be derived."

The City's Finance Director (ORS 294.004 (2)) and staff acting in accordance with this Investment Policy, written procedures, and Oregon Revised Statutes 294.035 and 294.040 and exercising due diligence shall be relieved of personal responsibility for an individual security's credit risk or market price change or other loss, provided deviations from expectations are reported and appropriate action is taken to control adverse developments within a timely fashion as defined in this policy.

5.3 Ethics:

Officers and employees involved in the investment process shall refrain from personal activity that could conflict with the proper execution and management of the investment program, or that could impair their ability to make impartial decisions. Employees and investment officials shall disclose any material interests in financial institutions with which they conduct business. Disclosure shall be made to the governing body. They shall further disclose any personal investment positions that could be related to the performance of the investment portfolio. Employees and officers shall refrain from undertaking personal investment transactions with the same individual with whom business is conducted on behalf of the City. Officers and employees shall, at all times, comply with the State of Oregon Government Standards and Practices code of ethics set forth in ORS Chapter 244.

6. AUTHORIZED FINANCIAL INSTITUTIONS

The City shall maintain a list of all authorized financial institutions and dealers that are approved for investment purposes. Any firm is eligible to make an application to the Finance Director and upon due consideration and approval, will be added to the list. Additions and deletions to the list will be made at the City's discretion. There should be in place, proof as to all the necessary credentials and licenses held by employees of the brokers/dealers who will have contact with the City of Tualatin as specified by but not necessarily limited to the Financial Industry Regulatory Authority (FINRA), Securities and Exchange Commission (SEC), etc.

6.1 Broker/Dealers:

The Investment Officer shall determine which broker/dealer firms and registered representatives are authorized for the purposes of investing funds within the scope of this investment policy. A list will be maintained of approved broker/dealer firms and affiliated registered representatives. The following minimum criteria must be met prior to authorizing investment transactions. The Investment Officer may impose more stringent criteria.

- a. Broker/Dealer firms must meet the following minimum criteria:
 - i. Be registered with the Securities and Exchange Commission (SEC);
 - ii. Be registered with the Financial Industry Regulatory Authority (FINRA).
 - iii. Provide most recent audited financials.
 - iv. Provide FINRA Focus Report filings.
- b. Approved broker/dealer employees who execute transactions with the City must meet the following minimum criteria:
 - i. Be a registered representative with the Financial Industry Regulatory Authority (FINRA);
 - ii. Be licensed by the state of Oregon;
 - iii. Provide certification (in writing) of having read; understood; and agreed to comply with the most current version of this investment policy.
- c. If the City's investment advisor is contracted to provide securities transactions on behalf of the City, the advisor's broker/dealer list must be provided to the Investment Officer for approval. The Investment Officer can assign the responsibility of

broker/dealer due diligence process to the Advisor, and all licensing information on the counterparties will be maintained by the Advisor and available upon request.

The advisor broker/dealer review should include:

- i. FINRA Certification check
- ii. Firm Profile
- iii. Firm History
- iv. Firm Operations
- v. Disclosures of Arbitration Awards, Disciplinary and Regulatory Events
- vi. State Registration Verification
- vii. Financial review of acceptable FINRA capital requirements or letter of credit for clearing settlements.

The advisors must provide the City with any changes to the list prior to transacting on behalf of the City.

6.2 Financial Bank Institutions:

All financial banks that provide bank deposits, certificates of deposits or any other deposit of the bank to the City must either be fully covered by the FDIC or the bank must be a participant of the Public Funds Collateralization Program (PFCP) program. ORS Chapter 295 governs the collateralization of Oregon public funds and provides the statutory requirements for the Public Funds Collateralization Program. Bank depositories are required to pledge collateral against any public funds deposits in excess of deposit insurance amounts. This provides additional protection for public funds in the event of a bank loss. ORS Chapter 295 sets the specific value of the collateral, as well as the types of collateral that are acceptable. ORS Chapter 295 creates a shared liability structure for participating bank depositories, better protecting public funds though still not guaranteeing that all funds are 100% protected.

6.3 Investment Advisors:

An Investment Advisor may be utilized to manage funds and will be selected through a competitive RFP process. The Advisor must meet the following criteria:

- a. The investment advisor firm must be registered with the Securities and Exchange Commission (SEC) or licensed by the state of Oregon; (Note: Investment advisor firms with assets under management > \$100 million must be registered with the SEC, otherwise the firm must be licensed by the state of Oregon);
- b. All investment advisor firm representatives conducting investment transactions on behalf of City must be registered representatives with FINRA;
- c. All investment advisor firm representatives conducting investment transactions on behalf of City must be licensed by the state of Oregon;
- d. Contract terms will include that the Investment advisor will comply with the City's Investment Policy.

A periodic (at least annual) review of all authorized investment advisors under contract will be conducted by the Finance director to determine their continued eligibility within the portfolio guidelines. The Investment Advisor must notify the City immediately if any of the following issues arise while serving under a City Contract:

- a. Pending investigations by securities regulators.
- b. Significant changes in net capital.
- c. Pending customer arbitration cases.
- d. Regulatory enforcement actions.

6.4 Competitive Transactions:

The Finance Director will obtain telephone, faxed or emailed quotes before purchasing or selling an investment. The Finance Director will select the quote which best satisfies the investment objectives of the investment portfolio within the parameters of this policy. The Finance Director and/or the Investment Advisor will maintain a written record of each bidding process including the name and prices offered by each participating financial institution.

In the instance of a security for which there is no readily available competitive bid or offering on the same specific issue, the Investment Officer shall document quotations for comparable or alternative securities.

The City's investment advisor that is providing investment management services must provide documentation of competitive pricing execution on each transaction. The investment advisor will retain documentation and provide upon request.

7. SAFEKEEPING AND CUSTODY

7.1 Safekeeping of Securities and Funds:

Securities will be held by an independent third-party safekeeping institution selected by the City in the City's segregated account. Upon request, the safekeeping institution shall make available a copy of its Statement on Standards for Attestation Engagements (SSAE) No. 16.

All trades of marketable securities will be executed on a delivery vs payment (DVP) basis to ensure that securities are deposited in the City of Tualatin's safekeeping institution prior to the release of funds. The City will have online access through the safekeeping bank for verification of the account holdings and transactions.

7.2 Bank Deposits and Certificates of Deposit:

The City may hold bank deposits or certificates of deposits at banks qualified under ORS 295.

7.3 Accounting Method:

The City shall comply with all required legal provisions and Generally Accepted Accounting Principles (GAAP). The accounting principles are those contained in the pronouncements of authoritative bodies including but not necessarily limited to, the Governmental Accounting Standards Board (GASB); the American Institute of Certified Public Accountants (AICPA); and the Financial Accounting Standards Board (FASB).

7.4 Internal Controls:

The Finance Director shall maintain a system of written internal controls which shall address the following areas of concern:

- Compliance with investment policy constraints and requirements
- Clear delegation of authority
- Segregation of duties and separation of responsibilities for trade execution, accounting, and record keeping
- Written confirmation of transactions and funds transfers
- Timely reconciliation of custodial reports
- Appropriate security for online transactions and access to bank accounts and bank data
- Custodial safekeeping
- Control of collusion
- Review, maintenance and monitoring of security procedures both manual and automated
- Dual authorizations of wire and automated clearing house (ACH) transfers
- Avoidance of physical delivery of securities wherever possible and address control requirements for physical delivery where necessary

An external auditor shall provide an annual independent audit to assure compliance with Oregon state law and City of Tualatin policies and procedures.

8. AUTHORIZED AND SUITABLE INVESTMENTS

8.1 Authorized Investments:

All investments of the City shall be made in accordance with Oregon Revised Statutes: ORS 294.035 (Investment of surplus funds of political subdivisions; approved investments), ORS 294.040 (Restriction on investments under ORS 294.035), ORS 294.135 (Investment maturity dates), ORS 294.145 (Prohibited conduct for Finance Director including not committing to invest funds or sell securities more than 14 business days prior to the anticipated date of settlement), ORS 294.805 to 294.895 (Local Government Investment Pool). Any revisions or extensions of these sections of the ORS must be amended to this policy in order to be allowable. If additional types of securities are considered for investment, per Oregon state statute they will not be eligible for investment until this Policy has been amended and the amended version adopted by City Council. Minimum credit ratings and percentage limitations apply to the time of purchase.

8.2 Suitable Investments:

The City is empowered to invest in the following types of securities:

US Treasury Obligations: US Treasury and other government obligations that carry the full faith and credit guarantee of the United States for the timely payment of principal and interest [ORS Section 294.035(3)(a)].

US Agency Obligations: Senior debenture obligations of US federal agencies and instrumentalities or U.S. government sponsored enterprises (GSE) whose payment is guaranteed by the United States [ORS Section 294.035(3)(a)].

Municipal Debt: Lawfully issued debt obligations of the States of Oregon, California, Idaho and Washington and political subdivisions of those states if the obligations have a long-term rating on the settlement date of AA- or better by S&P or Aa3 or better by Moody's or equivalent rating by any nationally recognized statistical rating organization, or are rated on the settlement date in the highest category for short-term municipal debt by a nationally recognized statistical rating organization [ORS Section 294.035(3)(c)].

Corporate Indebtedness: Corporate indebtedness subject to a valid registration statement on file with the Securities and Exchange Commission or issued under the authority of section 3(a)(2) or 3(a)(3) of the Securities Act of 1933, as amended. Corporate indebtedness must be rated on the settlement date AA- or better by S&P or Aa3 or better by Moody's or equivalent rating by any nationally recognized statistical rating organization [ORS Section 294.035(3)(i)].

Commercial Paper: Corporate indebtedness subject to a valid registration statement on file with the Securities and Exchange Commission or issued under the authority of section 3(a)(2) or 3(a)(3) of the Securities Act of 1933, as amended. Commercial Paper must be rated A1 by Standard and Poor's or P1 by Moody's or equivalent rating by any nationally recognized statistical rating organization. Issuer constraints for commercial paper combined with corporate notes will be limited by statute to 5% of market value per issuer [ORS Section 294.035(3)(i)].

Certificates of Deposit: Certificates of deposit in insured institutions as defined in ORS 706.008, in credit unions as defined in ORS Section 723.006 or in federal credit unions, if the institution or credit union maintains a head office or a branch in this state [ORS Section 294.035(3)(d)].

Bank Time Deposit/Savings Accounts: Time deposit open accounts or savings accounts in insured institutions as defined in ORS Section 706.008, in credit unions as defined in ORS Section 723.006 or in federal credit unions, if the institution or credit union maintains a head office or a branch in this state [ORS Section 294.035(3)(d)].

Bankers' Acceptance: Banker's acceptances, if the banker's acceptances are: (i) Guaranteed by, and carried on the books of, a qualified financial institution*; (ii) Eligible for discount by the Federal Reserve System; and (iii) Issued by a qualified financial institution whose short-term letter of credit rating is rated in the highest category by one or more nationally recognized statistical rating organizations [ORS Section 294.035(3)(h)].

Local Government Investment Pool: State Treasurer's local short-term investment fund up to the statutory limit per ORS Section 294.810.

*For the purposes of this paragraph, "qualified financial institution" means: (i) A financial institution that is located and licensed to do banking business in the State of Oregon; or (ii) A financial institution that is wholly owned by a financial holding company or a bank holding company that owns a financial institution that is located and licensed to do banking business in the State of Oregon [ORS Section 294.035(3)(h)].

8.3 Collateralization:

Time deposit open accounts, Certificates of Deposit and savings accounts shall be collateralized through the collateral pool for any excess over the amount insured by an agency of the United States government in accordance with ORS 295.015 and ORS 295.018.

9. INVESTMENT PARAMETERS

9.1 Diversification:

The City will diversify the investment portfolio to avoid incurring unreasonable risks, both credit and interest rate risk, inherent in over investing in specific instruments, individual financial institutions or maturities.

Credit risk: is the risk that a security or a portfolio will lose some or all of its value due to a real or perceived change in the ability of the issuer to repay its debt.

Liquidity risk: is the risk that an investment may not be easily marketable or redeemable.

Interest rate risk: longer term investments have the potential to achieve higher returns but are also likely to exhibit higher market value price volatility due to the changes in the general level of interest rates.

Diversification Constraints on Total Holdings – Liquidity and Core Funds

Issue Type	Maximum % Holdings	Maximum % per Issuer	Ratings S&P, Moody's or Equivalent	Maximum Maturity
US Treasury Obligations	100%	None	N/A	5.25 years
US Agency Obligations	100%	35%	N/A	5.25 years
Municipal Obligations (OR, CA, ID, WA)	25%	5%	AA- / Aa3 Short Term*	5.25 years
Corporate Notes	35%**	5%***	AA- / Aa3	5.25 years
Commercial Paper			A1 / P1	270 days
Bank Time Deposits/Savings Accounts	25%	10%	Oregon Public Depository	N/A
Certificates of Deposit	10%	5%	Oregon Public Depository	5.25 years
Banker's Acceptance	25%	5%	A1 / P1	180 days
Oregon Short Term Fund	Maximum allowed per ORS 294.810	None	N/A	N/A

*Short Term Ratings: Moody's- P1/MIG1/VMIG1, S&P - A-1/SP-1, Fitch - F1

**35% maximum combined corporate and commercial paper per ORS.

***Issuer constraints apply to the combined issues in corporate and commercial paper holdings.

9.2 Investment Maturity:

The City will not directly invest in securities with a stated maturity of more than 5.25 years from the date of purchase.

- The maximum weighted maturity of the total portfolio shall not exceed two and a half (2.5) years. This maximum is established to limit the portfolio to excessive price change exposure.
- Liquidity funds will be held in the State Pool, Bank Deposits or in money market instruments maturing six months and shorter. The liquidity portfolio shall, at a minimum, represent six month budgeted outflows.
- Core funds will be defined as the funds in excess of liquidity requirements. The investments in this portion of the portfolio will have maturities between 1 day and 5.25 years and will be only invested based on the diversification parameters listed in 9.1 of this policy.
- Total Portfolio Maturity Constraints:

Maturity Constraints	Minimum % of Total Portfolio
Under 30 days	10%
Under 1 year	25%
Under 5.25 years	100%
Maturity Constraints	Total Portfolio Maximum
Weighted Average Maturity	2.5 years
Security Structure Constraint	Maximum % of Total Portfolio
Callable Agency Securities	25%

9.3 Prohibited Investments:

- The City shall not invest in "144A" private placement securities, this includes commercial paper privately placed under section 4(a)(2) of the Securities Act of 1933
- The City shall not lend securities nor directly participate in a securities lending or reverse repurchase program.
- The City shall not purchase mortgage-backed securities.
- The City will not purchase, per ORS 294.040, any bonds of issuers listed in ORS 294.035(3)(a) to (c) that have a prior default history.
- No commitments to buy or sell securities may be made more than 14 days prior to the anticipated settlement date, or receive a fee other than interest for future deliveries.

10. INVESTMENT OF PROCEEDS FROM DEBT ISSUANCE

Investments of bond proceeds are restricted further and will not include corporate bonds in the dedicated bond proceed portfolio. All other allowable investments including: US Treasury, US Agency and Commercial Paper may be utilized. The investments will be made in a manner to match cash flow expectations based on managed disbursement schedules.

Liquidity for bond proceeds will be managed through the OSTF Pool or Bank deposit balances.

Funds from bond proceeds and amounts held in a bond payment reserve or proceeds fund may be invested pursuant to ORS 294.052. Investments of bond proceeds are typically not invested for resale and maturity matched with expected outflows.

Information will be maintained for arbitrage rebate calculations.

11. INVESTMENT OF RESERVE OR CAPITAL IMPROVEMENTS

Pursuant to ORS 294.135(1)(b), reserve or capital Improvement project monies may be invested in securities exceeding 5.25 years when the funds in question are being accumulated for an anticipated use that will occur more than 18 months after the funds are invested, then, upon the approval of the governing body of the county, municipality, school district or other political subdivision, the maturity of the investment or investments made with the funds may occur when the funds are expected to be used.

12. POLICY COMPLIANCE AND PERFORMANCE STANDARDS

12.1 Compliance Measurement and Procedures:

- a. Compliance Report: A compliance report documenting the portfolio versus the investment policy shall be maintained quarterly.
- b. Compliance Measurement: Guideline measurements will use market value of investments.
- c. Compliance Procedures:
 - i. If the portfolio falls outside of compliance with adopted investment policy guidelines or is being managed inconsistently with this policy, the Investment Officer shall bring the portfolio back into compliance in a prudent manner and as soon as prudently feasible.
 - ii. Violations of portfolio guidelines as a result of transactions; actions to bring the portfolio back into compliance and; reasoning for actions taken to bring the portfolio back into compliance shall be documented and reported to the City Council.
 - iii. Due to fluctuations in the aggregate surplus funds balance, minimum or maximum percentages for a particular issuer, investment type or maturity constraint may be surpassed at a point in time. Securities need not be liquidated to realign the portfolio; however, consideration should be given to this matter when future purchases are made to ensure that appropriate diversification is maintained.
 - iv. As determined on any date that the security is held within the portfolio. If the credit rating of a security is subsequently downgraded below the minimum rating level for a new investment of that security, the Finance Director shall evaluate the downgrade on a case-by-case basis in order to determine if the security should be held or sold. The Finance Director will apply the general objectives of Safety, Liquidity, Yield and

Legality to make the decision. If the City has hired the services of an Investor Advisor, the Finance Director will act on the recommendation of the Advisor.

12.2 Performance Measurement:

- a. The City yields will be compared to the OST Pool rates.
- b. The portfolio will be invested into a predetermined structure that will be measured against a selected benchmark portfolio. The structure will be based upon a chosen minimum and maximum effective duration and will have the objective to achieve market rates of returns over long investment horizons. The purpose of the benchmark is to appropriately manage the risk in the portfolio given interest rate cycles. The core portfolio is expected to provide similar returns to the benchmark over interest rate cycles, but may underperform or out perform in certain periods. The portfolio will be positioned to first protect principal and then achieve market rates of return. The benchmark used will be a 0-3 year or 0-5 year standard market index and comparisons will be calculated monthly and reported quarterly.
- c. When comparing the performance of the City's portfolio, all fees and expenses involved with managing the portfolio shall be included in the computation of the portfolio's rate of return.
- d. The mark to market pricing will be calculated monthly and be provided in a monthly report.

13. REPORTING REQUIREMENTS

The Finance Director will retain and provide quarterly investment reports to the City Council in a similar manner as outlined in ORS 208.090. The reports also will be available upon request. Securities holdings and cash balances held in the investment portfolio will be provided on the reports.

The minimum quarterly reporting requirements for total portfolio are as follows:

- Earnings Yield
- Holdings Report (including mark to market)
- Transactions Report
- Weighted Average Maturity or Duration
- Compliance Report

14. INVESTMENT POLICY ADOPTION

This Investment Policy shall be adopted by City Council annually in accordance with ORS 294.135(a). Any significant changes to the policy must be reviewed by the Oregon Short Term-Fund Board prior to submitting to City Council for adoption.

15. GLOSSARY

Accrued Interest: The interest accumulated on a security since the issue date or since the last coupon payment. The buyer of the security pays the market price plus accrued interest.

Agency Securities: See “Federal Agency Securities.”

Bankers’ Acceptance (BA’s): A draft or bill of exchange drawn upon and accepted by a bank. Frequently used to finance shipping of international goods. Used as a short-term credit instrument, bankers’ acceptances are traded at a discount from face value as a month market instrument in the secondary market on the basis of the credit quality of the guaranteeing bank.

Basis Point: A basis point is a unit of measure used in finance to describe the percentage change in the value or rate of a financial instrument. One basis point is equivalent to 0.01% (1/100th of a percent) or 0.0001 in decimal form. In most cases, it refers to changes in interest rates and bond yields.

Benchmark: A market index used as a comparative basis for measuring the performance of an investment portfolio. A performance benchmark should represent a close correlation to investment guidelines, risk tolerance and duration of the actual portfolio’s investments.

Bond: An interest-bearing security issued by a corporation, government, governmental agency, or other body. It is a form of debt with an interest rate, maturity, and face value, and it is usually secured by specific assets. Most bonds have a maturity of greater than one year and in general, pay interest semiannually.

Broker/Dealer: A person or firm transacting securities business with customers. A “broker” acts as an agent between buyers and sellers, and receives a commission for these services. A “dealer” buys and sells financial assets from its own portfolio. A dealer takes risk by owning an inventory of securities, whereas a broker merely matches up buyers and sellers.

Call: An option to buy a specific asset at a certain price within a certain period of time.

Callable: A bond or preferred stock that may be redeemed by the issuer before maturity for a call price specified at the time of issuance.

Call Date: The date before maturity on which a bond may be redeemed at the option of the issuer.

Certificate of Deposit (CD): Bank obligation issued by a financial institution generally offering a fixed rate of return (coupon) for a specified period of time (maturity).

Collateral: Securities or other property that a borrower pledges as security for the repayment of a loan. Also refers to securities pledged by a bank to secure deposits of public monies.

Commercial Paper: Short-term, unsecured, negotiable promissory notes issued by a company or financial institution. Issued at a discount and matures at par or face value. Usually a maximum maturity of 270 days, and given a short-term debt rating by one or more NRSROs.

Core Fund: Core funds are defined as operating fund balance which exceeds the City’s daily liquidity needs. Core funds are invested out the yield curve to diversify maturity structure in the

overall portfolio. Having longer term investments in a portfolio will stabilize the overall portfolio interest earnings over interest rate cycles.

Corporate Note: A debt instrument issued by a corporation with a maturity of greater than one year and less than ten years.

Coupon Rate: The annual rate of interest that the issuer of a bond promises to pay to the holder of the bond.

Current Maturity: The amount of time left until an obligation matures. For example, a one-year bill issued nine months ago has a current maturity of three months.

Current Yield: The coupon payments on a security as a percentage of the security's market price. In many instances the price should be gross of accrued interest, particularly on instruments where no coupon is left to be paid until maturity.

CUSIP: A CUSIP number identifies securities. CUSIP stands for Committee on Uniform Security Identification Procedures, which was established under the auspices of the American Bankers Association to develop a uniform method of identifying municipal, U.S. government, and corporate securities.

Delivery Versus Payment (DVP): Settlement procedure in which securities are delivered versus payment of cash, but only after cash has been received. Most security transactions, including those through the Fed Securities Wire system and DTC, are done DVP as a protection for both the buyer and seller of securities.

Depository Trust Company (DTC): A firm through which members can use a computer to arrange for securities to be delivered to other members without physical delivery of certificates. A member of the Federal Reserve System and owned mostly by the New York Stock Exchange, the Depository Trust Company uses computerized debit and credit entries. Most corporate securities, commercial paper, CDs and BAs clear through DTC.

Discount Notes: Short term debt obligations issued by Federal Agencies at a discount. Discount notes mature at par and can range in maturity from overnight to one year. Discount Notes typically have very large primary (new issue) and secondary markets.

Federal Agency Security: A debt instrument issued by one of the federal agencies. Federal agencies are considered second in credit quality and liquidity only to U.S. Treasuries.

Federal Agency: Government sponsored/owned entity created by the U.S. Congress, generally for the purpose of acting as a financial intermediary by borrowing in the marketplace and directing proceeds to specific areas of the economy considered to otherwise have restricted access to credit markets.

Federal Farm Credit Bank (FFCB): A Government Sponsored Enterprise (GSE) system that is a network of cooperatively owned lending institutions that provide credit services to farmers, agricultural cooperatives and rural utilities. The FFCBs act as financial intermediaries that borrow money in the capital markets and use the proceeds to make loans and provide other assistance to farmers and farm-affiliated businesses. FFCB debt is not an obligation of, nor is it guaranteed by the U.S. government, although it is considered to have minimal credit risk due to its importance

to the U.S. Financial system and agricultural industry. Also issues notes under its “designated note” program.

Federal Home Loan Bank System (FHLB). A Government Sponsored Enterprise (GSE) system, consisting of wholesale banks (currently twelve district banks) owned by their member banks, which provides correspondent banking services and credit to various financial institutions, financed by the issuance of securities. The principal purpose of the FHLB is to add liquidity to the mortgage markets. Although FHLB does not directly fund mortgages, it provides a stable supply of credit to thrift institutions that make new mortgage loans. FHLB debt is not an obligation of, nor is it guaranteed by the U.S. government, although it is considered to have minimal credit risk due to its importance to the U.S. financial system and housing market. Frequent issuer of discount notes, agency notes and callable agency securities. Also issues notes under its “global note” and “TAP” programs.

Federal Home Loan Mortgage Corporation (FHLMC or "Freddie Mac"). One of the large Federal Agencies. A government sponsored public corporation (GSE) that provides stability and assistance to the secondary market for home mortgages by purchasing first mortgages and participation interests financed by the sale of debt and guaranteed mortgage backed securities. FHLMC debt is not an obligation of, nor is it guaranteed by the U.S. government, although it is considered to have minimal credit risk due to its importance to the U.S. financial system and housing market. Frequent issuer of discount notes, agency notes, callable agency securities and MBS. Also issues notes under its “reference note” program.

Federal National Mortgage Association (FNMA or "Fannie Mae"). One of the large Federal Agencies. A government sponsored public corporation (GSE) that provides liquidity to the residential mortgage market by purchasing mortgage loans from lenders, financed by the issuance of debt securities and MBS (pools of mortgages packaged together as a security). FNMA debt is not an obligation of, nor is it guaranteed by the U.S. government, although it is considered to have minimal credit risk due to its importance to the U.S. financial system and housing market. Frequent issuer of discount notes, agency notes, callable agency securities and MBS. Also issues notes under its “benchmark note” program.

Federal Reserve Bank. One of the 12 distinct banks of the Federal Reserve System.

Federal Reserve System (the Fed). The independent central bank system of the United States that establishes and conducts the nation's monetary policy. This is accomplished in three major ways: (1) raising or lowering bank reserve requirements, (2) raising or lowering the target Fed Funds Rate and Discount Rate, and (3) in open market operations by buying and selling government securities. The Federal Reserve System is made up of twelve Federal Reserve District Banks, their branches, and many national and state banks throughout the nation. It is headed by the seven member Board of Governors known as the “Federal Reserve Board” and headed by its Chairman.

General Obligation Bonds (GOs): Bonds secured by the pledge of the municipal issuer's full faith and credit, which usually includes unlimited taxing power.

Government Bonds: Securities issued by the federal government; they are obligations of the U.S. Treasury. Also known as “government securities.”

Government Sponsored Enterprise (GSE): Privately owned entity subject to federal regulation and supervision, created by the U.S. Congress to reduce the cost of capital for certain borrowing

sectors of the economy such as students, farmers, and homeowners. GSEs carry the implicit backing of the U.S. Government, but they are not direct obligations of the U.S. Government. For this reason, these securities will offer a yield premium over Treasuries. Some consider GSEs to be stealth recipients of corporate welfare. Examples of GSEs include: FHLB, FHLMC, FNMA and FFCB.

Interest: Compensation paid or to be paid for the use of money. The rate of interest is generally expressed as an annual percentage.

Interest Rate: The interest payable each year on borrowed funds, expressed as a percentage of the principal.

Investment Advisor: A company that provides professional advice managing portfolios, investment recommendations and/or research in exchange for a management fee.

Investment Portfolio: A collection of securities held by a bank, individual, institution, or government agency for investment purposes.

Investment Securities: Securities purchased for an investment portfolio, as opposed to those purchased for resale to customers.

Liquidity: The ease at which a security can be bought or sold (converted to cash) in the market. A large number of buyers and sellers and a high volume of trading activity are important components of liquidity.

Liquidity Component: A percentage of the total portfolio that is dedicated to providing liquidity needs for the City.

Mark to Market: Adjustment of an account or portfolio to reflect actual market price rather than book price, purchase price or some other valuation.

Municipals: Securities, usually bonds, issued by a state or its agencies. The interest on “munis” is usually exempt from federal income taxes and state and local income taxes in the state of issuance. Municipal securities may or may not be backed by the issuing agency’s taxation powers.

NRSRO: A “Nationally Recognized Statistical Rating Organization.” A designated rating organization that the SEC has deemed a strong national presence in the U.S. NRSROs provide credit ratings on corporate and bank debt issues. Only ratings of a NRSRO may be used for the regulatory purposes of rating such as Moody’s, S&P, Fitch and Duff & Phelps.

Par Value: The value of a security expressed as a specific dollar amount marked on the face of the security, or the amount of money due at maturity. Par value should not be confused with market value.

Prudent Person Standard: Standard that requires that when investing, reinvesting, purchasing, acquiring, exchanging, selling, or managing public funds, a trustee will act with care, skill, prudence, and diligence under the circumstances the prevailing, including, but not limited to, the general economic conditions and the anticipated needs of the agency, that a prudent person acting in a like capacity and familiarity with those matters would use in the conduct of funds of a like character and with like aims, to safeguard the principal and maintain the liquidity needs of the entity.

Rate of Return: Amount of income received from an investment, expressed as a percentage of the amount invested.

State of Oregon Local Government Investment Pool (OSTF – Oregon Short Term Fund): The OSTF is organized pursuant to ORS 294.805 through 294.895. Participation in the Pool will not exceed the maximum limit annually set by ORS 294.810.

Total Return: Investment performance measured over a period of time that includes coupon interest, interest on interest, and both realized and unrealized gains or losses. Total return includes, therefore, any market value appreciation/depreciation on investments held at period end.

Treasury Bill (T-Bill): An obligation of the U.S. government with a maturity of one year or less. T-bills bear no interest but are sold at a discount.

Treasury Bonds and Notes: Obligations of the U.S. government that bear interest. Notes have maturities of one to ten years; bonds have longer maturities.

Yield: The annual rate of return on an investment, expressed as a percentage of the investment. Income yield is obtained by dividing the current dollar income by the current market price for the security. Net yield, or yield to maturity, is the current income yield minus any premium above par or plus any discount from par in the purchase price, with the adjustment spread over the period from the date of purchase to the date of maturity of the bond.

Yield to Maturity: The average annual yield on a security, assuming it is held to maturity; equals to the rate at which all principal and interest payments would be discounted to produce a present value equal to the purchase price of the bond.