



## TUALATIN CITY COUNCIL MEETING

MONDAY, AUGUST 10, 2020

JUANITA POHL CENTER  
8513 SW TUALATIN ROAD  
TUALATIN, OR 97062

Mayor Frank Bubenik  
Council President Nancy Grimes  
Councilor Paul Morrison                      Councilor Robert Kellogg  
Councilor Bridget Brooks                      Councilor Maria Reyes  
Councilor Valerie Pratt

---

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, August 10. 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. As always, public comment is limited to three minutes per person.

Phone: +1 669 900 6833

Meeting ID: 823 4396 0600 Password: 18880

Link: <https://us02web.zoom.us/j/82343960600?pwd=K2lvbFhGUjJnaEZDbW1wMndkemFqUT09>

---

### Work Session

- 1. 5:00 p.m. (60 min) - Urban Renewal Feasibility Study Update-** Staff presentation on the feasibility of urban renewal areas in the City of Tualatin.
- 2. 6:00 p.m. (30 min) - Parks Asset Costs**
- 3. 6:30 p.m. (30 min) – Council Meeting Agenda Review, Communications & Roundtable.** Council will review the agenda for the August 10th City Council meeting and brief the Council on issues of mutual interest.

---

### 7:00 P.M. CITY COUNCIL MEETING

#### Call to Order

## 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 City Council Work Session and Regular Meeting Minutes of July 27, 2020
2. Consideration of Approval of a Change in Liquor License Application for Bushwhackers
3. Consideration of **Resolution No. 5510-20** Authorizing Award of a Preliminary Engineering Contract for the Herman Road (Teton Ave to Tualatin Rd) Project to Century West Engineering Corporation
4. Consideration of **Resolution No. 5514-20** Authorizing the City Manager to Execute an Intergovernmental Agreement (IGA) with Washington County for City and Special District Assistance Program
5. Consideration of **Resolution No. 5515-20** Authorizing the City Manager to Execute a Deed Acquiring Riverfront Property for the Tualatin River Greenway

## Special Reports

1. Quarterly Financial Report

## Public Hearings - Quasi-Judicial

1. Consideration of Plan Text Amendment 20-0003 which would modify the Medium Low-Density Residential (RML) zone to allow detached single-family residential dwellings as an outright permitted use

## 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/council](http://www.tualatinoregon.gov/council).

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](http://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

## CITY OF TUALATIN Staff Report

**TO:** Honorable Mayor and Members of the City Council  
**THROUGH:** Sherilyn Lombos, City Manager  
**FROM:** Jonathan Taylor, Economic Development Manager  
**DATE:** August 10, 2020

---

### **SUBJECT:**

Urban Renewal Feasibility Study Update. Staff presentation on the feasibility of urban renewal areas in the City of Tualatin.

### **EXECUTIVE SUMMARY:**

#### *Background*

Starting in April 2019, the City of Tualatin began a multi-phased process to community revitalization and financing tools – beginning with an urban renewal education series.

#### **Phase 1: Education Series.**

A four-part series that provided an overview of urban renewal and tax increment financing; the history of Tualatin's urban renewal areas, and how to close down an urban renewal area; what to do with the remaining assets of Central Urban Renewal District and Leveton Tax Increment Finance District; and to explore the feasibility of new districts based on Council-identified community and economic development goals.

#### **Phase 2: Urban Renewal Area Official Closure.**

In January 2020, the City Council and Tualatin Development Commission completed the closure of the Central Urban Renewal District (CURD), transferred remaining assets to the City of Tualatin, and adopted the final report on CURD.

#### **Phase 3: Technical Study of the Feasibility Study of Urban Renewal Areas.**

On February 24, 2020, the City Council directed staff to begin *Phase 3* with the technical study of feasibility of urban renewal in two areas: 1.) Basalt Creek/SW Industrial Area, 2.) The I-5 Corridor and Tualatin-Sherwood Road. The purpose of the feasibility study is to understand if tax increment financing is an appropriate tool to help meet the needs of our community. The needs that have been identified include infrastructure to incentivize greenfield development, providing additional housing options, improving local and regional transportation systems, addressing long-term vacant buildings, preparing and planning for transportation needs associated with the SW Corridor project, and providing redevelopment opportunities for community oriented commercial and retail development. Last year, the City conducted an economic and housing needs assessment that determined the community needed over 1,000 additional residential units to meet demand, and nearly 200 acres more for industrial and commercial development.

#### *Clarifications and Important Points*

The feasibility study is a technical document that determines the viability of urban renewal in a specific area. These feasibility studies do not commit the Tualatin Development Commission or the

City of Tualatin to create or establish urban renewal areas or plans in these areas. No official action is required for the feasibility study.

If Council wishes to move forward with the establishment of urban renewal areas, staff will prepare a more detailed proposal for moving into **Phase 4: Stakeholder Input** and will return at a later date.

---

**ATTACHMENTS:**

- Attachment A – Power Point (includes proposed area maps)

# City of Tualatin Urban Renewal Feasibility Studies

Nick Popenuk and Elaine Howard

August 10, 2020

# Question for Council Tonight

If City Council agrees with the following findings, "Should staff prepare a more detailed proposal for moving to the next phase of considering potential new urban renewal areas?"

# Agenda

- Background
- Feasibility of Study Area 1
- Feasibility of Study Area 2
- Questions/Discussion
- Next Steps



# Why is a feasibility study being conducted?

- The City of Tualatin is conducting this feasibility study to understand if tax increment financing is an appropriate tool to accomplish community priorities in the identified areas.

# Background

- Five Phased Approach:
  1. Education Series (Completed)
  2. Closure (Completed)
  - 3. Feasibility Study**
  4. *Future Phases\**: Stakeholder Input
  5. *Future Phases\**: Urban Renewal Plan

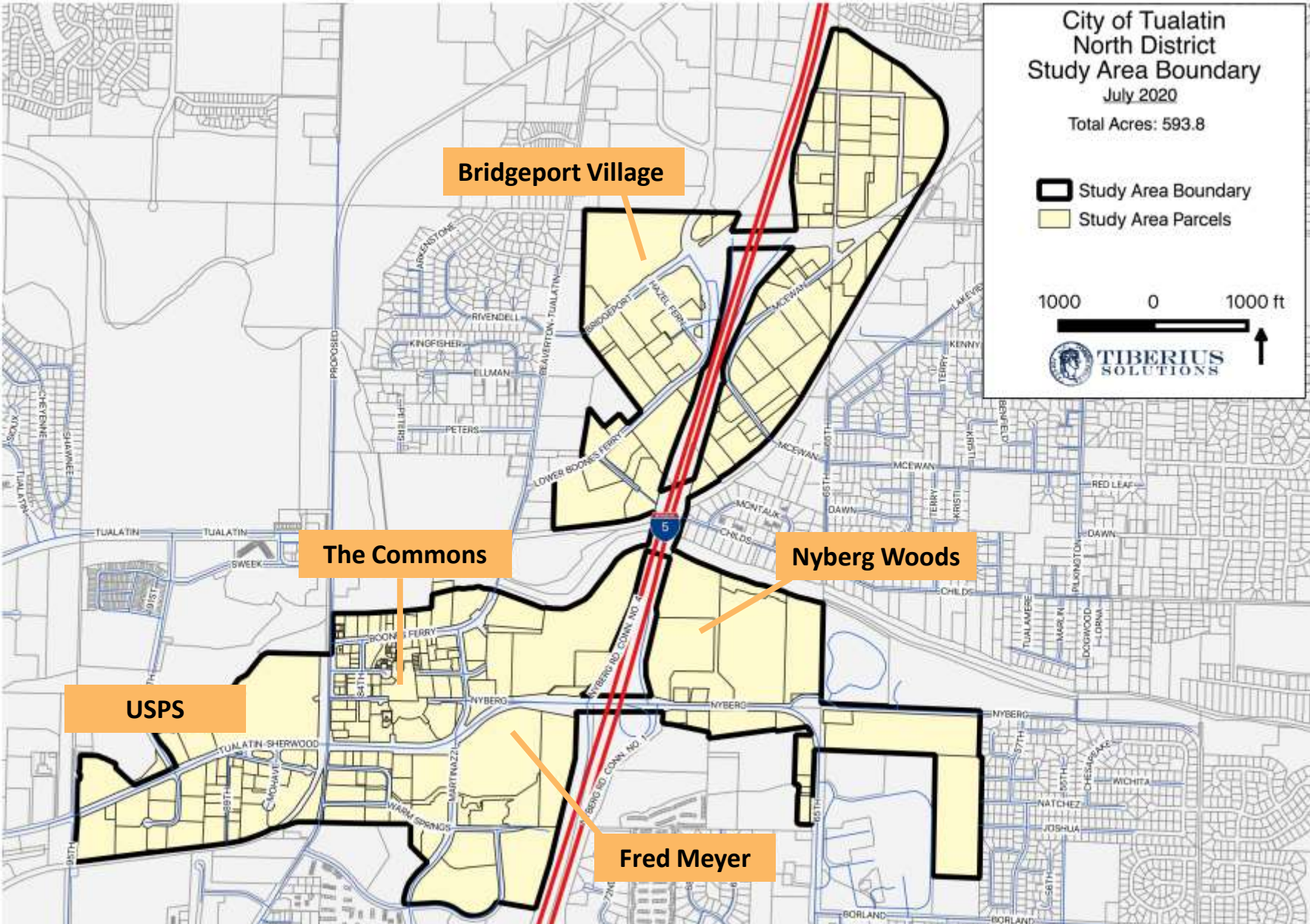
# Background

- **Feasibility Study Purpose:**
  - To determine if urban renewal is an appropriate tool to accomplish identified community needs.
  - Important to Note: Project identification, boundary and financial assessments, stakeholder input does not occur during this process.
- Early phases were educational/technical
- Outreach to public and taxing districts will occur in subsequent phases if Council wishes to proceed.

# How to determine if an area is feasible?

- Do the proposed boundaries comply with statutory limitations on acreage and assessed value?
- Would the proposed boundaries generate a significant amount of tax increment finance revenue?
- Do the proposed boundaries have public needs that would benefit from urban renewal investment?

# Study Area 1 – Boundary



# Study Area 1 – Desired Outcomes

- Stakeholder input will identify project list based on community desired outcomes.
- Potential Desired Outcomes:
  - Provide Additional Housing Options
  - Improve Transportation Systems
  - Prepare for increased density
  - Address Long-Term Vacant Buildings
  - Redevelopment Opportunities
  - Property Acquisition

# Study Area 1 – Financial Capacity

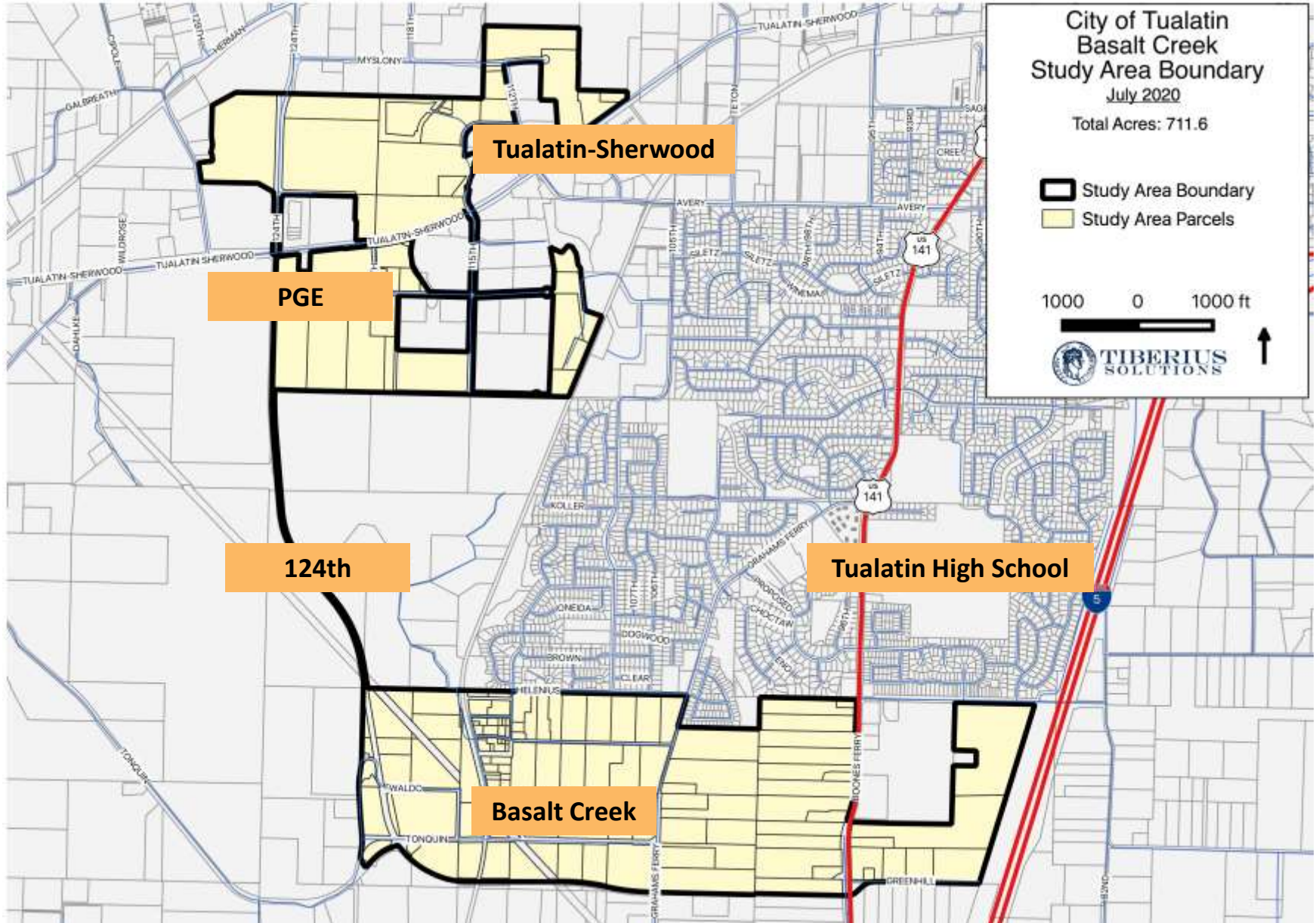
- Capacity (2020\$): **\$100 million +**
- City Foregone Revenue: **\$0.19 per \$1.00**
- Options to scale back financial impact:
  - “Under-levy” annual TIF
  - Shorten duration of URA
  - Reduce the size of URA boundary

# Is this area feasible?

- Do the proposed boundaries comply with statutory limitations on acreage and assessed value?
  - Yes
- Would the proposed boundaries generate a significant amount of tax increment finance revenue?
  - Yes
- Do the proposed boundaries have public needs that would benefit from urban renewal investment?
  - Yes



# Study Area 2 – Boundary

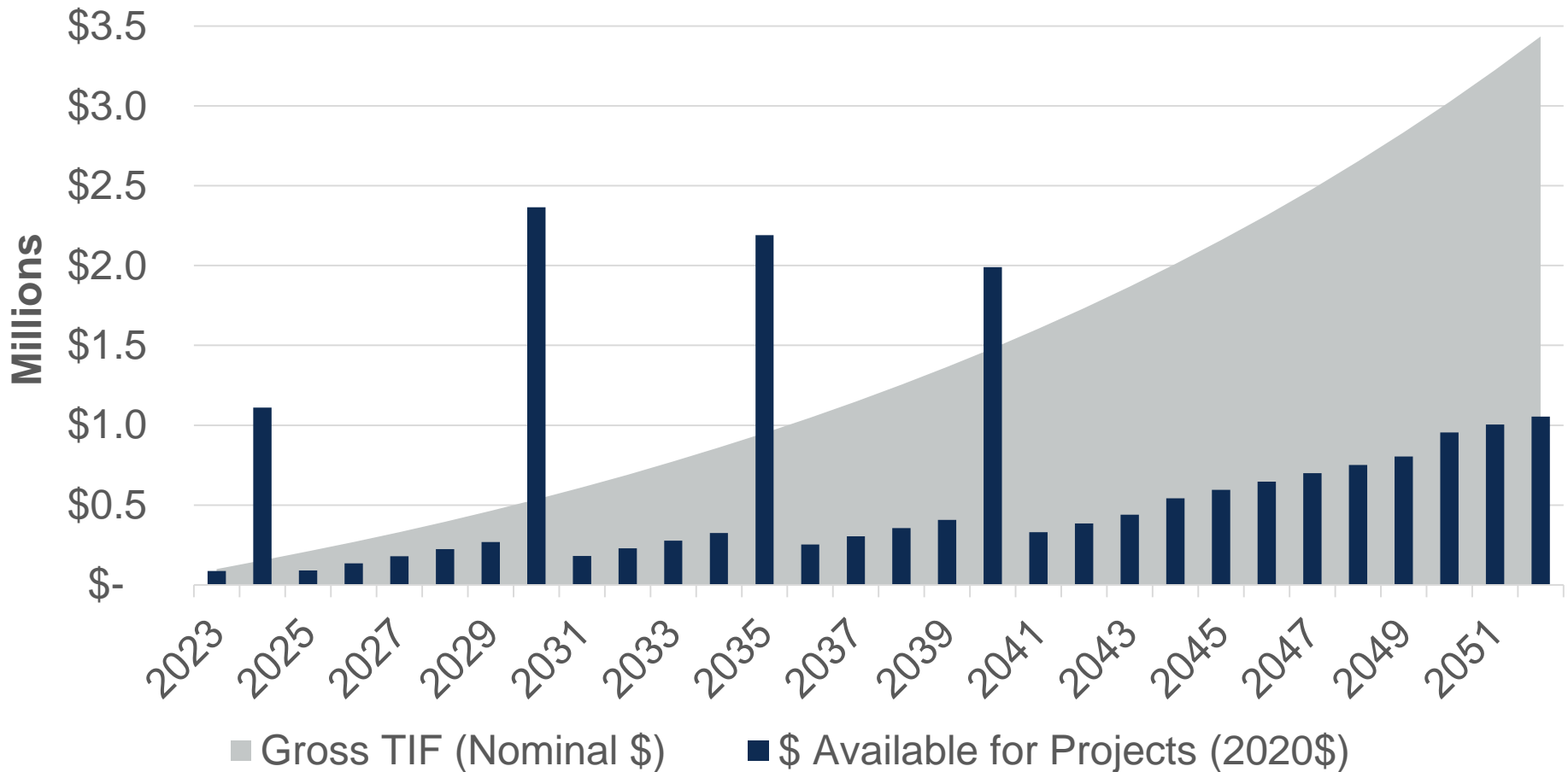


# Study Area 2 – Desired Outcomes

- Stakeholder input will identify project list based on community desired outcomes.
- Potential Desired Outcomes:
  - Infrastructure improvements (All Types)
  - Prepare for increased density
  - Greenfield Development
  - Property Acquisition
  - “Mimic the great success” of Leveton

# Study Area 2 – Financial Capacity

- Capacity (2020\$): **\$14 to \$26 million**
- City Foregone Revenue: **\$0.13 per \$1.00**



# Is this area feasible?

- Do the proposed boundaries comply with statutory limitations on acreage and assessed value?
  - Yes
- Would the proposed boundaries generate a significant amount of tax increment finance revenue?
  - Yes
- Do the proposed boundaries have public needs that would benefit from urban renewal investment?
  - Yes

# Consultant Recommendation

- Emphasize stakeholder input if proceeding
- Foster meaningful collaboration with affected taxing districts.
- Leave all options on the table at this time.
- For Boundary 1, explore creative approaches to capitalize on strong financial capacity, while mitigating long-term impacts to taxing districts (including the City.)
- Drafting proposals for next steps to be brought back at a later date.

# Next Steps – District 1 (North Area)

If Council wishes to proceed:

- 1.) Official review of feasibility study. (No Official Action is taken)
- 2.) Staff will draft an outline and proposal on how to proceed with moving into the next phase.

# Next Steps – District 2 (South Area)

If Council wishes to proceed:

- 1.) Official review of feasibility study. (No Official Action is taken)
- 2.) Staff will draft an outline and proposal on how to proceed with moving into stakeholder input (Phase 4).

# Questions for Council Tonight

If City Council agrees with these findings, "Should staff prepare a more detailed proposal for moving to the next phase of considering potential new urban renewal areas?"



# Questions?

## Nick Popenuk

Tiberius Solutions LLC

503-740-0501

[popenuk@tiberiussolutions.com](mailto:popenuk@tiberiussolutions.com)



**TIBERIUS**  
SOLUTIONS

## Elaine Howard

Elaine Howard Consulting LLC

503-206-7060

[elainehowardconsulting@gmail.com](mailto:elainehowardconsulting@gmail.com)





*City of Tualatin*

## CITY OF TUALATIN Staff Report

**TO:** Honorable Mayor and Members of the City Council

**THROUGH:** Sherilyn Lombos, City Manager

**FROM:** Ross Hoover, Parks and Recreation Director  
Rich Mueller, Parks Planning and Development Manager

**DATE:** August 10, 2020

---

**SUBJECT:**  
Parks Asset Costs

**EXECUTIVE SUMMARY:**

During the discussions about parks funding and implementation of the Parks and Recreation Master Plan during fall of 2019 and winter of 2020, Council asked for information regarding the condition of the park system. Many of the current parks and facilities are 25 to 30 years old and in need of renovation, replacement, and improvements. At the Council meeting on June 22 the Parks Condition Assessment was presented with information on the process and purpose of asset assessment, data collected about the current condition of the park system, and next steps.

Staff will present Parks Asset Costs with a summary on the condition of the park system, cost estimates, condition examples, total costs, timeline, and next steps.

---

**ATTACHMENTS:**

Presentation



# PARKS ASSET COSTS

# CONDITION OF PARK SYSTEM



**1**

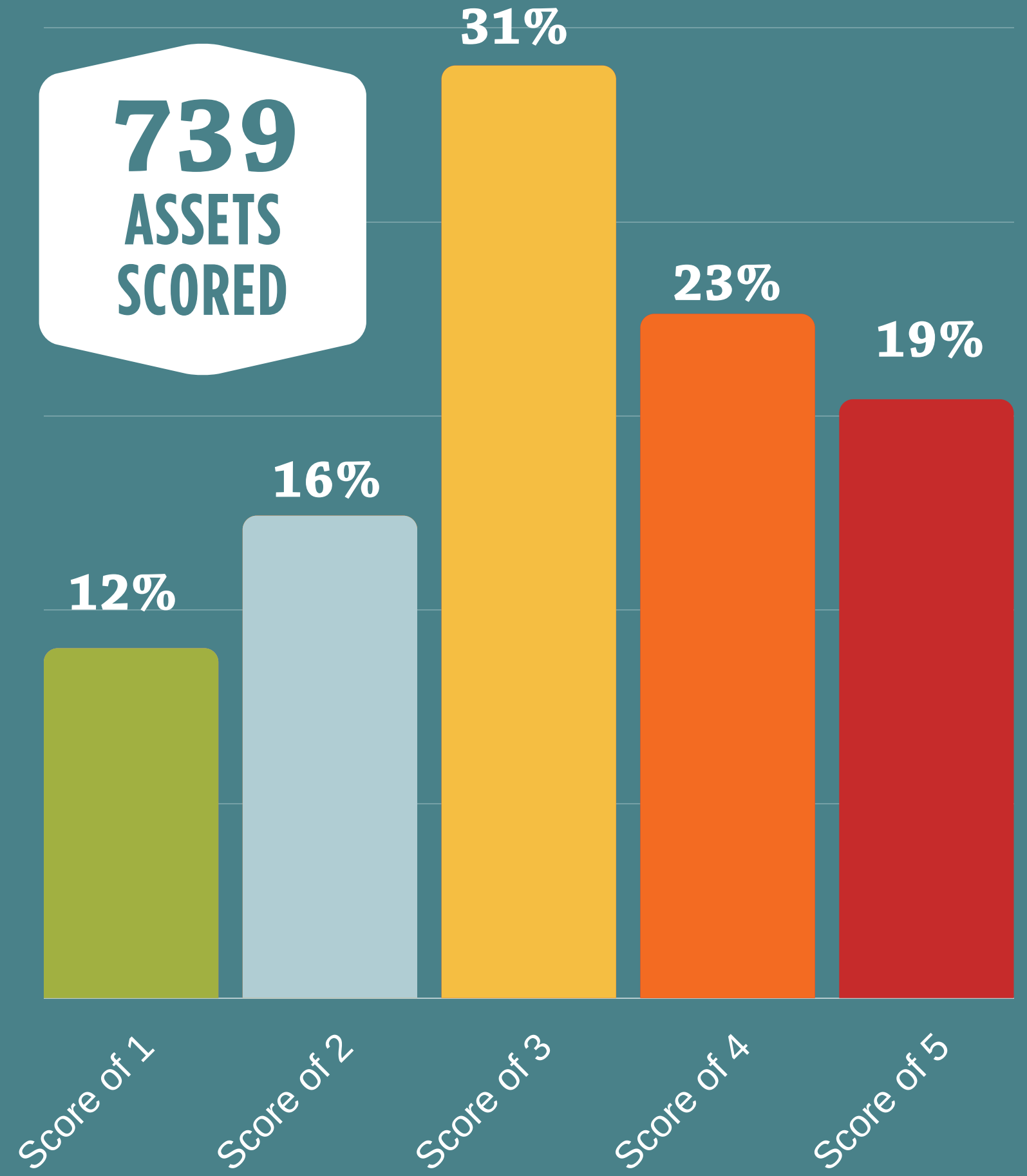
**BRAND NEW  
PERFECT CONDITION  
FULLY ACCESSIBLE**



**5**

**END OF LIFE CYCLE  
SAFETY HAZARD  
NON ACCESSIBLE**

**739  
ASSETS  
SCORED**



# INCLUDED IN COST ESTIMATES

- Renovation & replacements
- Existing park facilities & assets (outdoors)
- Recreation building repairs & improvements (ADA in public areas only)
- Americans with Disabilities Act improvements (conjunction with park projects)



## NOT INCLUDED IN COST ESTIMATES

- Building renovation (structure & interior), replacement or improvements
- Standard maintenance costs (staff, supplies, services)
- Natural resources restoration (natural areas & greenways)
- Natural resources maintenance
- Americans with Disabilities Act improvements
- Project design & engineering
- Utility infrastructure renovation & replacements
- City, county, state, federal, & environmental permits
- Expansion or additional park & facilities
- Property acquisition

5

EXAMPLES

City of Tualatin Parks & Recreation PARKS ASSET COSTS



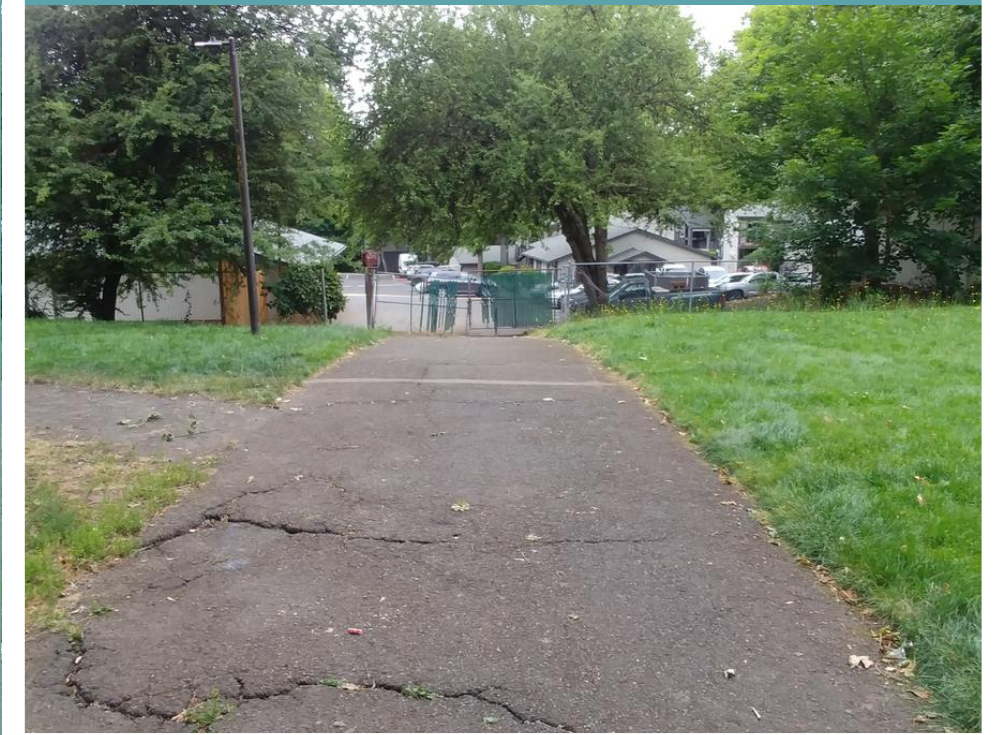
TUALATIN COMMUNITY PARK BOAT RAMP



TUALATIN COMMONS PATH SURFACE



STONERIDGE PARK



TOTAL  
COST FOR

5

\$7,485,860





4

EXAMPLES



LOWER TURF  
ATFALATI PARK



CHIEFTAIN DAKOTA  
PATH SURFACE



LITTLE WOODROSE PARK  
STAIRS



TOTAL  
COST FOR



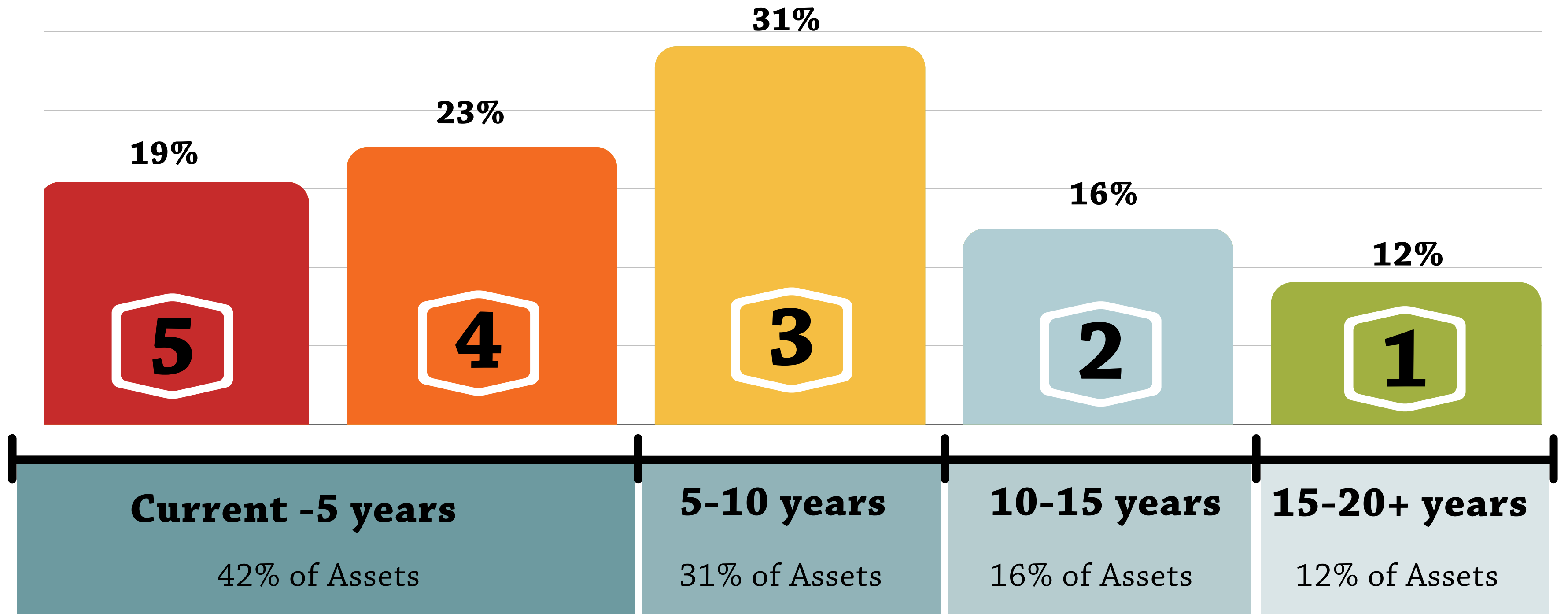
\$4,077,165



TOTAL COST FOR  & 

**\$11,563,025**

# PLAN TIMELINE



# NEXT STEPS

COMPARABLES

FUNDING OPTIONS

NATIONAL COMMUNITY SURVEY RESULTS



*City of Tualatin*

**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:** August 10, 2020

---

**SUBJECT:**

Consideration of Approval of the City Council Work Session and Regular Meeting Minutes of July 27, 2020

**RECOMMENDATION:**

Staff respectfully recommends the Council adopt the attached minutes.

---

**ATTACHMENTS:**

- City Council Work Session Meeting Minutes of July 27, 2020
- City Council Regular Meeting Minutes of July 27, 2020



## OFFICIAL MINUTES OF THE TUALATIN CITY COUNCIL WORK SESSION MEETING FOR JULY 27, 2020

Present: Mayor Frank Bubenik, Council President Nancy Grimes, Councilor Bridget Brooks, Councilor Robert Kellogg, Councilor Paul Morrison, Councilor Maria Reyes, Councilor Valerie Pratt

---

### **Work Session**

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

#### **1. Tualatin 2040 Implementation Update.**

Community Development Director Aquilla Hurd-Ravich and Planning Manager Steve Koper presented an update on the Tualatin 2040 Implementation. Director Hurd-Ravich recapped the project including the visioning process, code updates, emerging issues, and prioritization. She stated staff is now in the implementation phase which includes the adoption of the comprehensive plan. Manager Koper reviewed the timeline and work plan for the housing updates to the comprehensive plan. He explained it is important to have a comprehensive plan as it is required by law and establishes zoning and sets community standards. He added the plan helps communicate community vision and goals, as well as provides policies that meet the vision, and provides a framework for land uses, infrastructure, resource conservation, and more in Tualatin. Manager Koper stated the city is updating the comprehensive plan to provide a housing element based on the completed Housing Needs Assessment. He added the chapters will be reordered to group similar goals and visions that are currently spread out across multiple chapters. Manager Koper showed examples of how to incorporate the housing needs assessment into the comprehensive plan. He shared ideas for some of the additional graphic updates. Manager Koper stated public outreach on the implementation includes creation of a website, feedback and refinement from the Planning Commission, an interested party's review, an annual cost burden housing event, and attendance at CIO meetings. Manager Koper stated next steps include the planning commissions review and recommendations.

Councilor Pratt asked about the consulting grant they received and what it will be used for. Manager Koper stated it would be for language for the missing middle provisions in the update.

Councilor Reyes asked if this plan includes the results from the community survey's done last year. Manager Koper stated the plan includes those results and incorporates feedback into the city's values and goals.

Councilor Brooks stated she is glad to see this become more user friendly. She expressed concerns with density increases and how that will work into the transportation planning and environmental impact statements.

Councilor Morrison asked how we get developers to help build for the missing middle. Manager Koper stated the Council will be getting into those details during future discussions.

Mayor Bubenik asked if there will be any rework once the consultants come on board. Manager Koper stated staff is currently working on the best information they have and the consultants coming on early will help them be more nibble moving forward.

## **2. 2021 Legislative Agenda for the League of Oregon Cities**

Assistant to the City Manager Megan George presented the League of Oregon Cities (LOC) 2021 Legislative Priorities. She stated the LOC is looking for the cities feedback on priorities for the upcoming year. Manager George stated staff has identified four top priority areas: Expedited Siting for Shelter and Affordable Housing, Mental Health Service Delivery, Municipal Broadband and Municipal Pole Protection, and Right-of-way/Franchise Fees Authority Preservation. She asked for Council feedback on the priorities.

Councilor Brooks stated she would like to see Local Climate Action Planning Resources and Long Term Transportation Infrastructure Funding included as priorities for Tualatin.

Councilor Morrison stated he would like to see Local Climate Action Planning made a priority. He made comments regarding Right-of-way/Franchise Fee Authority Preservation noting that he would like to see it less of a priority as to not scare off service providers.

Councilor Kellogg strongly supported Municipal Broadband and Municipal Pole Protection and Right-of-way/Franchise Fees Authority Preservation as priorities for the city. He noted he would like to see Local Speed Setting Authority added as a priority.

Mayor Bubenik stated Council consensus was reached to forward staff recommendations and add Local Climate Action Planning Resources and Long Term Transportation Infrastructure Funding to the list.

## **3. Council Meeting Agenda Review, Communications & Roundtable.**

Councilor Pratt announced Meals on Wheels is in need of drivers to help deliver meals to our elderly population.

Councilor Kellogg stated the Food Pantry is in need of donations and volunteers as there is a large need currently. He stated if any Councilors want to endorse the Metro Transportation Bond they can get in touch with Metro Councilor Dirksen to assist with that.

Councilor Morrison stated he attended the C4 sub-committee meeting.

Councilor Brooks stated she attended the Tualatin Arts Advisory Committee meeting and the Local Leaders Meeting with Representative Prusak.

Mayor Bubenik stated he attended the Obama Foundation Mayor's Pledge workshops, Modern Middle Housing Tour, Westside Economic Alliance meeting, Metro Mayors Consortium meeting, Greater Portland Inc. meeting, and the In-N-Out Community meeting.

## **Adjournment**

Mayor Bubenik adjourned the meeting at 6:20 p.m.

Sherilyn Lombos, City Manager

\_\_\_\_\_ / Nicole Morris, Recording Secretary

\_\_\_\_\_ / Frank Bubenik, Mayor





## OFFICIAL MINUTES OF THE TUALATIN CITY COUNCIL MEETING FOR JULY 27, 2020

Present: Mayor Frank Bubenik, Council President Nancy Grimes, Councilor Bridget Brooks, Councilor Robert Kellogg, Councilor Paul Morrison, Councilor Maria Reyes, Councilor Valerie Pratt

---

### Call to Order

Mayor Bubenik called the meeting to order at 7:01 p.m.

### Public Comment

Anthony Stewart, Western Oregon Dispensary, followed up with the Council on addressing the concerns they have presented in the past regarding locations of marijuana dispensaries.

### Consent Agenda

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

Voting Yea: Mayor Bubenik, Council President Grimes, Councilor Brooks, Councilor Kellogg, Councilor Morrison, Councilor Reyes, Councilor Pratt

MOTION PASSED

1. Consideration of Approval of the City Council Regular Meeting Minutes of June 22, 2020 and Work Session and Regular Meeting Minutes of July 13, 2020
2. Consideration of Approval of a Change in Liquor License Application for P.F. Chang's China Bistro
3. Consideration of **Resolution No. 5512-20** a Resolution Amending Resolution No. 5505-20 to Amend Utility Fees for Hydrant and Bulk Water Usage Charges

### Special Reports

1. Oregon Department of Transportation (ODOT) Presentation on I-5 and I-205 Tolling

ODOT Toll Program Director Lucinda Broussard and WSP Consultants Heather Wills and Matt Dolata presented an update on the I-205 Toll Project. Director Broussard stated they have started the National Environmental Policy Act (NEPA) process on the project. She stated there is an upcoming Equity and Mobility Advisory Committee to draft the charter and work plan, work on the toll projects equity framework, and receive an update on the I-205 and I-5 Tolling Projects. Director Broussard stated they hosted an I-205 Regional Modeling group that reviewed an early screening analysis of the five potential toll alternatives. She recapped what they have heard about tolls including implementing equitability, operational effectiveness of modern toll systems, lack of a robust transit service in Clackamas County, and how local trips will be treated. Director Broussard stated the 45 day comment period will start on August 3 to obtain feedback on the range of alternatives for environmental review, obtain feedback on the purpose and need statement, increase awareness of toll systems, and share information on the results of the

feasibility analysis. She stated engagement during the period will include an online open house and webinar, information sharing on the website and social media, committee meetings, stakeholder interviews, and community engagement liaisons.

Consultant Wills covered the purpose and need statements, goals, and objectives. She stated the project purpose is to manage congestion on I-205 between Stafford Road and OR 213 and raise revenue to fund congestion relief projects. Consultant Wills shared the projects goals and objectives including items such as equitable benefits for all users, limited additional traffic rerouting, supporting regional economic growth, and support of travel demand. She stated the next steps in the environmental review process include the 45 day comment period and preparation of the draft environmental assessment.

Consultant Dolata presented the screening alternatives analysis results. He presented the five alternatives: a toll on the Abernethy Bridge, toll on the Abernethy Bridge with tolling gantries off the bridge, individually tolling multiple bridges to be rebuilt, segment based tolls from Stafford Road to OR 213, and Single Zone Tolls from Stafford Road to OR 213. Consultant Dolata presented performance measures for screening alternatives and evaluation criteria. He spoke to the results noting the 2027 model results showed daily volume reduction along I-205 with diversion being at its worst during the off-peak hours. Consultant Dolata spoke to diversions off I-205 including rerouting to other roadways regionally and locally and the transportation demand management that happens from tolling. He spoke to the Transportation System Demand that showed reduced vehicle miles traveled, a reduction in vehicle hours traveled, and shifted demand from freeways to non-freeway routes. It was noted the model shows peak hours with the greatest potential vehicle hours savings overall, with potential decreases on non-freeways as well as freeways. Consultant Dolata shared locations that were assessed for rerouting noting that there were small shifts in the regional and local models and shared changes in the model based on the alternatives. He stated staff is progressing through the rerouting analysis by identifying potential impacted routes, identifying potential scale of impacts at key locations, and identifying impacts to study intersections during peak hours. Consultant Dolata shared the cost and revenue for each alternative. He presented future system considerations and expansions. Consultant Dolata presented a performance comparison summary for all the alternatives. He stated the initial recommendations for the NEPA analysis include advancing alternative 3 and 4 and to refine toll schedule assumptions to improve regional outcomes. Consultant Dolata covered the rationale behind the recommendations including alternative three being the most effective and alternative four having the greatest flexibility.

Councilor Pratt asked once the bridges are rebuilt if the tolling ends. Director Broussard stated tolls would pay for the construction of the bridges and then it would be decided if they would stay.

Councilor Pratt asked what percentage of the revenues is in administration for the tolls. Ms. Broussard stated 15%.

Councilor Pratt asked for clarification on the purpose being to reduce traffic on I-205 and not on the alternative routes. Consultant Dolata stated the primary objective is I-205 and then making sure the overall system is better.

Councilor Pratt asked if they are looking at the potential growth and housing for the region. Mr. Dolata stated they are currently looking out to 2027 and will eventually look out to 2040 when they are further along in the process.

Councilor Brooks asked for clarification in the numbers for the local re-routing near I-205. Consultant Dolata stated the reported numbers are the change in the number with tolling. Councilor Brooks asked about the significant increases to the area in alternatives three and four. Consultant Dolata stated the changes are for the peak hours. Councilor Brooks stated the numbers are alarming and is surprised that those alternatives are being suggested for this area. She expressed concerns with traffic and gridlock already in the area and the impacts tolling will have.

Councilor Morrison shared concerns with the modeling being based off a wish list and not off the reality on how the area works. He stated rerouting doesn't help or alleviate the traffic problem. Councilor Morrison asked about the tolling authority along the segments. Consultant Willis explained tolling authority and what tolling can pay for. Councilor Morrison stated the intent of the legislators was for the tolling to be temporary and asked about the change in tone regarding ongoing tolling for maintenance. Director Broussard stated the commission would make the decision on tolling after the project is complete and paid for.

Council President Grimes stated the alternatives are egregious. She stated the models don't include the local growth for the Stafford Triangle in the future and expressed concerns with alternative four and impacts due to re-routing. Consultant Dolata stated the goal with alternative four is to manage traffic better based on cost and implementation. Director Broussard stated when they start working on the NEPA they will be using the 2040 data which will include the Stafford area growth. She added one specific alternative has not been chosen and the comment period is when ODOT needs feedback on each alternative. Council President Grimes asked when they get to see equity applied to this project. Director Broussard stated the equity committee will be meeting to review the draft analysis.

Councilor Reyes stated equity is important to the Council because they want to consider the people who work in the area. She wants to make sure outreach is properly done with the right groups and not just directed to a website.

Councilor Pratt expressed concerns with the projects goals and objectives. Consultant Willis stated the goals and objectives have not been measured at the screening level. She noted the goals and objectives will be used as performance measures during the NEPA process and many haven't been touched at this point. Consultant Willis stated this is still high level at this point.

Councilor Kellogg asked about the diversion percentage for alternative three and four and the differences between the two. Mr. Dolata stated the numbers represents the change in volume over the course of the day. Councilor Kellogg asked about mitigations in the project and who will pay for those. Director Broussard stated the mitigation cost will be covered by the project.

Council President Grimes expressed concerns with the complications of mitigation for Borland Road.

Mayor Bubenik asked what it means to "manage traffic" in alternatives three and four. Mr. Dolata stated it is based on a variable tolling rate structure and shifting behaviors to help reduce congestion.

## Public Hearings - Legislative or Other

1. Consideration of **Resolution No. 5508-20** Adopting Findings in Support of Special Procurement and Authorizing the City Manager to Enter Into a Direct Negotiation Contract with Wallis Engineering, PLLC for Construction Engineering and Inspection Services for the Garden Corner Curves Project

Transportation Engineer Mike McCarthy presented the special procurement. He stated Wallis Engineering, PLLC was selected for the Garden Corner Curves project in fall 2018 through a Request for Proposals (RFP) process to design the project. Engineer McCarthy stated the RFP process is a qualifications based competitive selection process that was open to all qualified firms. He stated authorizing this contracting exemption allows the City to continue with the best consultant based upon the skills and experience needed to complete this project efficiently and effectively. Engineer McCarthy stated this continuity will provide substantial cost savings and public benefits to the City by reducing schedule delays that would result from a new competitive process. He noted Wallis Engineering has already worked with the City on the Garden Corner Curves concept study, design of the project, and all the public involvement efforts as part of those processes. Engineer McCarthy stated a new RFP process would take approximately two months, which would result in delays to construction of the project. He stated granting the special procurement process will be unlikely to encourage favoritism because this is a single special procurement that already went through a qualifications based selection process.

### PUBLIC COMMENT

None.

### COUNCIL DISCUSSION

Councilor Kellogg thanked staff for doing a thorough job going through the special procurement process.

Motion to adopt Resolution No. 5508-20 adopting findings in support of special procurement and authorizing the City Manager to enter into a direct negotiation contract with Wallis Engineering, PLLC for construction engineering and inspection services for the Garden Corner Curves Project made by Councilor Kellogg, Seconded by Councilor Brooks.

Voting Yea: Mayor Bubenik, Council President Grimes, Councilor Brooks, Councilor Kellogg, Councilor Morrison, Councilor Reyes, Councilor Pratt

MOTION PASSED

## General Business

1. Consideration of **Resolution No. 5515-20** of the City Council of the City of Tualatin Authorizing the City Manager to Execute an Intergovernmental Agreement (IGA) with Washington County for Small Business Emergency Assistance Grants Funds

Economic Development Manager Jonathan Taylor presented an IGA with Washington County for Small Business Emergency Assistance Grants Funds. He stated the resolution tonight is to receive \$680,000 in CARES Small Business Assistance. Manager Taylor presented requested council actions including approval of motion of contract modifications with Business Oregon for an additional \$243,000 to the approved \$35,000 existing contract for Emergency Business Assistance and direction for funding plan development based on Council priorities for economic impact. He recapped the Tualatin recovery plan mission to manage and implement an effective,

efficient, and nimble local economic recovery effort in collaboration with vital business partners. Manager Taylor stated the City is in the stabilization phase with efforts focused on the Business Recovery Centers. He stated potential areas of impacts include business assistance, rent assistance, childcare assistance, and potential future planning.

Councilor Morrison stated he wants these funds distributed quickly to help businesses now. He asked how child care fits into helping businesses. Manager Taylor stated you can help the facilities and/or the workers.

Councilor Brooks asked if childcare facilities would receive funding at the local level or just at the county level. Manager Taylor stated Council can broaden the economic vitality of this service and noted the County has a fund for childcare as well. Councilor Brooks would like to be able to help small childcare groups.

Councilor Reyes would like to explore providing childcare grants to centers to help families. She would like to see grants available to both families and providers.

Councilor Pratt asked what the Washington County childcare program will look like. Manager Taylor stated the details on that program are not available yet. Councilor Pratt wants to make sure there are local dollars for childcare.

Councilor Pratt expressed concern with the increase of homelessness and would like to see the city address that.

Councilor Kellogg asked if there is tax liability associated for the recipients of the funds. Manager Taylor stated there is a tax liability. He spoke in favor of the Economic Stabilization Fund 2.0. He would like to see more information on the rent assistance category and what is already available out there. Councilor Kellogg would like to see scholarships provided to childcare facilities to help assist families and the centers. He stated he would like to see a portion of the funds set aside for potential future grants.

Councilor Brooks asked for clarification if rental assistance if for homes or businesses. She would like to see a localized effort to prevent evictions.

Mayor Bubenik stated he wants to broaden rent assistance to mortgage assistance as well. He would also like to see homeless services expanded and a gift card program put in place to help local businesses and provide assistance to families.

Councilor Brooks expressed concerns with limitations in spending with gift card programs. She would like to see some cash flexibility available in a program like that as well.

Mayor Bubenik stated the city could set aside money for utility assistance and offsets. Director Hudson stated Washington County has set aside approximately \$3 million for utility assistance. He noted program details are still being finalized.

Councilor Brooks expressed concerns with capacity at Community Action so she wants to make sure those utility dollars come locally to Tualatin citizens.

Council consensus was reached to set money aside for business assistance, rental and mortgage assistance, childcare assistance, a reserve fund, and homeless services.

Motion to modify contract with Business Oregon for an additional \$243,000 to the approved \$35,000 existing contract for Emergency Business Assistance made by Councilor Brooks, Seconded by Councilor Pratt.

Voting Yea: Mayor Bubenik, Council President Grimes, Councilor Brooks, Councilor Kellogg, Councilor Morrison, Councilor Reyes, Councilor Pratt

MOTION PASSED

Motion to approve Resolution No. 5515-20 authorizing the City Manager to execute an Intergovernmental Agreement with Washington County for Small Business Emergency Assistance Grants Funds made by Council President Grimes, Seconded by Councilor Pratt.

Voting Yea: Mayor Bubenik, Council President Grimes, Councilor Brooks, Councilor Kellogg, Councilor Morrison, Councilor Reyes, Councilor Pratt

MOTION PASSED

### **Council Communications**

Councilor Morrison thanked citizens for feedback on the In-N-Out proposal.

Councilor Kellogg stated it is time to make Western Oregon's Dispensary concerns a priority for the city. Council consensus was reached to conduct community outreach on potential ordinance changes.

Councilor Pratt thanked the local Corvette Club for their donation to the Tualatin Police Foundation.

### **Adjournment**

Mayor Bubenik adjourned the meeting at 9:36 p.m.

Sherilyn Lombos, City Manager

\_\_\_\_\_ / Nicole Morris, Recording Secretary

\_\_\_\_\_ / Frank Bubenik, Mayor



*City of Tualatin*

## 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:** 8/10/2020

---

**SUBJECT:**

Consideration of Approval of a Change in Liquor License Application for Bushwhackers

**RECOMMENDATION:**

Staff respectfully recommends the Council approve endorsement of the liquor license application for Bushwhackers.

**EXECUTIVE SUMMARY:**

Bushwhackers has submitted a change in application under the liquor license category of full on-premises and off-premises. This would permit them to sell and serve distilled spirits, malt beverages, wine, and cider for consumption on and off premise. In addition this category allows for providing sample tastings of malt beverages, wine, and cider for consumption on the premises. The business is located 8200 SW Tonka Road. The application is in accordance with provisions of Ordinance No. 680-85 which establishes procedures for liquor license applicants. Applicants are required to fill out a City application form, from which a review by the Police Department is conducted, according to standards and criteria established in Section 6 of the ordinance. The Police Department has reviewed the new liquor license application and recommended approval. According to the provisions of Section 5 of Ordinance No. 680-85 a member of the Council or the public may request a public hearing on any of the liquor license requests. If such a public hearing request is made, a hearing will be scheduled and held on the license. It is important that any request for such a hearing include reasons for said hearing.

**FINANCIAL IMPLICATIONS:**

A fee has been paid by the applicant.

---

**ATTACHMENTS:**

- Application
- Vicinity Map



# CITY OF TUALATIN

## LIQUOR LICENSE APPLICATION

Return Completed form to:  
City of Tualatin  
Attn: Deputy City Recorder  
18880 SW Martinazzi Ave  
Tualatin, OR 97062

Date 7/14/20

**IMPORTANT:** This is a three-page form. **You are required to complete all sections of the form.**  
If a question does not apply, please indicate N/A. Please include full names (last, first middle) and full dates of birth (month/day/year). Incomplete forms shall receive an unfavorable recommendation.  
**Thank you for your assistance and cooperation.**

### SECTION 1: TYPE OF APPLICATION

- Original (New) Application - \$100.00 Application Fee.
- Change in Previous Application - \$75.00 Application Fee.
- Renewal of Previous License - \$35.00 Application Fee. Applicant must possess current business license. License # \_\_\_\_\_
- Temporary License - \$35.00 Application Fee.

### SECTION 2: DESCRIPTION OF BUSINESS

Name of business (dba): Bushwhackers

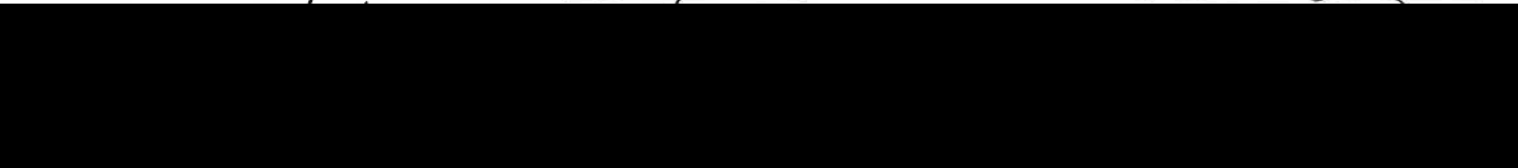
Business address 8200 SW Tonka City Tualatin State OR Zip Code 97062

Mailing address 8200 SW Tonka City Tualatin State OR Zip Code 97062

Telephone # 503 563 5823 Fax # 503 563 5829

Email bushwhackerssaloon@gmail.com

Name(s) of business manager(s) First Jay Middle Chester Last Johnson



Type of business \_\_\_\_\_

Type of food served American

Type of entertainment (dancing, live music, exotic dancers, etc.) dancing, DJ

Days and hours of operation M: 11am-11pm T: 11am-11pm W: 11am-11pm TH-FRI-SAT 11am-2am Sun-closed

Food service hours: Breakfast \_\_\_\_\_ Lunch 11:00-6:00 Dinner 6:00-11pm-2am

Restaurant seating capacity 120 Outside or patio seating capacity 50

How late will you have outside seating? until close How late will you sell alcohol? 2am



How many full-time employees do you have? 5 Part-time employees? 12

**SECTION 3: DESCRIPTION OF LIQUOR LICENSE**

Name of Individual, Partnership, Corporation, LLC, or Other applicants JNE Management LLC

Type of liquor license (refer to OLCC form) on + off premises sales

Form of entity holding license (check one and answer all related applicable questions):

**INDIVIDUAL:** If this box is checked, provide full name, date of birth, and residence address.  
Full name \_\_\_\_\_ Date of birth \_\_\_\_\_  
Residence address \_\_\_\_\_

**PARTNERSHIP:** If this box is checked, provide full name, date of birth and residence address for each partner. If more than two partners exist, use additional pages. If partners are not individuals, also provide for each partner a description of the partner's legal form and the information required by the section corresponding to the partner's form.  
Full name \_\_\_\_\_ Date of birth \_\_\_\_\_  
Residence address \_\_\_\_\_  
Full name \_\_\_\_\_ Date of birth \_\_\_\_\_  
Residence address \_\_\_\_\_

**CORPORATION:** If this box is checked, complete (a) through (c).  
(a) Name and business address of registered agent.  
Full name \_\_\_\_\_  
Business address \_\_\_\_\_

(b) Does any shareholder own more than 50% of the outstanding shares of the corporation? If yes, provide the shareholder's full name, date of birth, and residence address.  
Full name \_\_\_\_\_ Date of birth \_\_\_\_\_  
Residence address \_\_\_\_\_

(c) Are there more than 35 shareholders of this corporation? Yes No. If 35 or fewer shareholders, identify the corporation's president, treasurer, and secretary by full name, date of birth, and residence address.  
Full name of president: \_\_\_\_\_ Date of birth: \_\_\_\_\_  
Residence address: \_\_\_\_\_  
Full name of treasurer: \_\_\_\_\_ Date of birth: \_\_\_\_\_  
Residence address: \_\_\_\_\_  
Full name of secretary: \_\_\_\_\_ Date of birth: \_\_\_\_\_  
Residence address: \_\_\_\_\_

**LIMITED LIABILITY COMPANY:** If this box is checked, provide full name, date of birth, and residence address of each member. If there are more than two members, use additional pages to complete this question. If members are not individuals, also provide for each member a description of the member's legal form and the information required by the section corresponding to the member's form.  
Full name: Jay Chester Johnson Date of birth: 1/1

Full name: \_\_\_\_\_ Date of birth: \_\_\_\_\_  
Residence address: \_\_\_\_\_

**OTHER:** If this box is checked, use a separate page to describe the entity, and identify with reasonable particularity every entity with an interest in the liquor license.

**SECTION 4: APPLICANT SIGNATURE**

A false answer or omission of any requested information on any page of this form shall result in an unfavorable recommendation.

 \_\_\_\_\_ Date 7/14/20

**For City Use Only**

Sources Checked:

DMV by ap       LEADS by [Signature]       TuPD Records by ap  
 Public Records by [Signature]

Number of alcohol-related incidents during past year for location.

Number of Tualatin arrest/suspect contacts for \_\_\_\_\_

**It is recommended that this application be:**

~~Granted~~

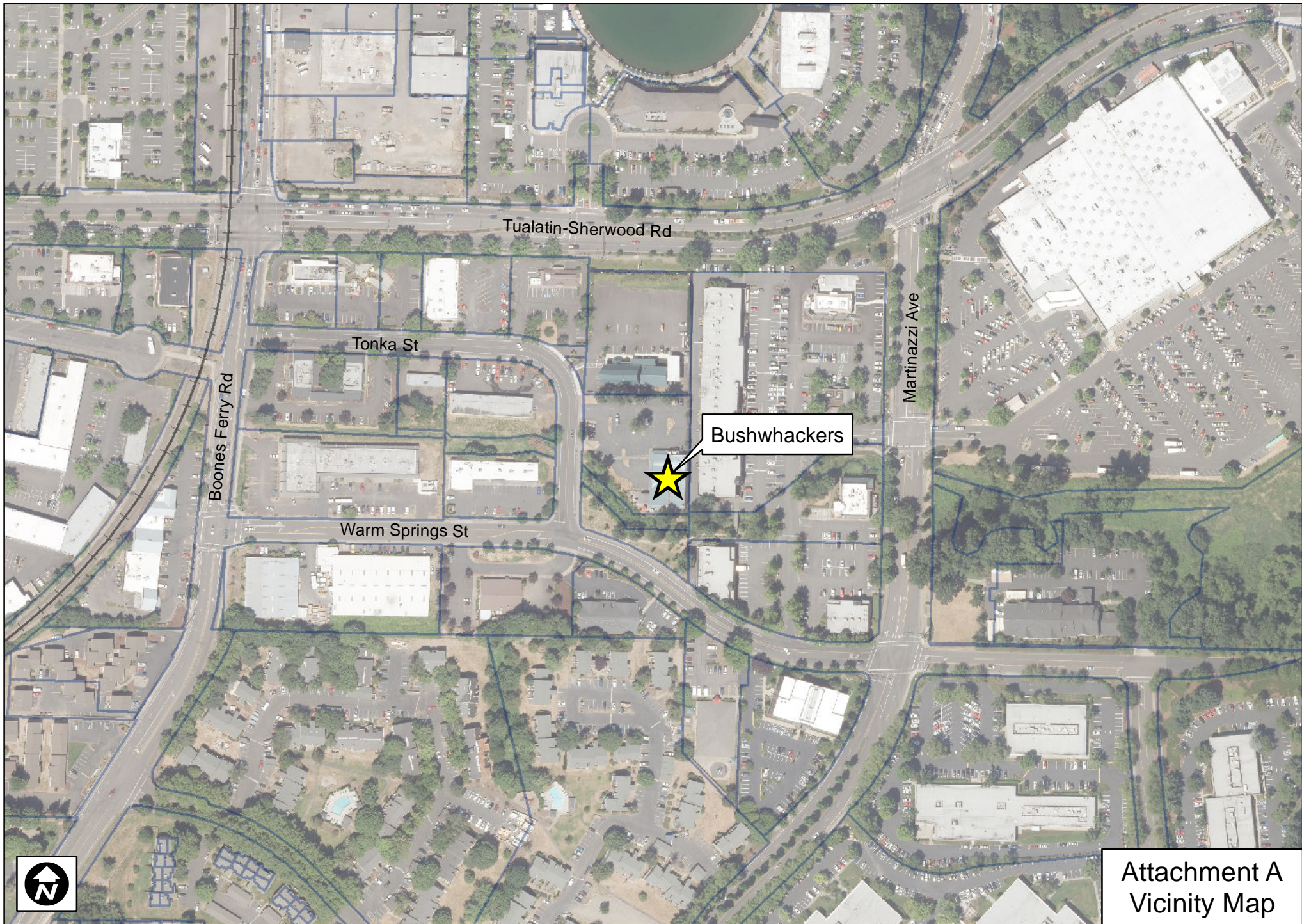
Denied

Cause of unfavorable recommendation: \_\_\_\_\_

[Signature]  
Signature

7-21-2020  
Date

Bill Steele  
Chief of Police  
Tualatin Police Department





*City of Tualatin*

## CITY OF TUALATIN Staff Report

**TO:** Honorable Mayor and Members of the City Council

**THROUGH:** Sherilyn Lombos, City Manager

**FROM:** Mike McCarthy, Principal Transportation Engineer  
Kim McMillan, City Engineer

**DATE:** August 10, 2020

---

### **SUBJECT:**

Resolution No. 5510-20 Authorizing Award of a Preliminary Engineering Contract for the Herman Road (Teton Ave to Tualatin Rd) Project to Century West Engineering Corporation

### **RECOMMENDATION:**

Staff recommends that Council approve the resolution awarding and allowing the City Manager to execute a contract with Century West Engineering Corporation for Preliminary Engineering for the Herman Road (Teton Ave to Tualatin Rd) Project in the amount of \$285,929.85.

### **EXECUTIVE SUMMARY:**

The Herman Road project will widen the existing narrow portion of Herman Road between Teton Avenue and Tualatin Road to include bike lanes on both sides of the road, a sidewalk along the north side, a possible center turn lane at the industrial park access, and improved drainage.

This contract is for the preliminary engineering phase of this project and includes listening to the needs of the community, developing and evaluating roadway design alternatives, and facilitating selection of a preferred alternative to advance to the detailed engineering phase.

In 2016 Tualatin was awarded a federal Regional Flexible Funding Allocation (RFFA) grant by Metro for a project including preliminary engineering to reconstruct Herman Road with bike lanes and sidewalk between Teton Avenue and Tualatin Road.

In 2019 Tualatin executed an Intergovernmental Agreement with Metro to allow this project to move forward with local Washington County funding through Metro, rather than federal funding through the Oregon Department of Transportation (ODOT) and Metro. Local funding allows this project to be delivered more efficiently using City standards.

The City issued a Request For Proposals for this project on February 26, 2020, including engineering services through the design and construction phases of the project. Five companies submitted proposals on or before the April 2, 2020 due date. Proposals were scored based on project understanding, team experience, and similar projects completed. The top two teams were interviewed (by videoconference) and Century West was chosen as the top team.

This contract is for the preliminary engineering phase of this project. It is anticipated that the City Manager will negotiate the subsequent phases for detailed engineering and for engineering services during construction up to the total amount of \$725,000.

**OUTCOMES OF DECISION:**

Approving the resolution and authorizing contract execution would allow the Century West team to proceed with preliminary engineering for this project.

**ALTERNATIVES TO RECOMMENDATION:**

Council could decide not to approve this resolution and direct staff to find a different way to complete this project.

**FINANCIAL IMPLICATIONS:**

Most of the funding for this project will come from Washington County through Metro. The City's share of the project cost is budgeted in the Road Operating Fund.

---

**ATTACHMENTS:**

- Resolution No. 5510-20 Authorizing Contract Award

RESOLUTION NO. 5510-20

A RESOLUTION AUTHORIZING A PROFESSIONAL SERVICES AGREEMENT FOR ENGINEERING OF THE HERMAN ROAD: TETON AVE TO TUALATIN RD PROJECT

WHEREAS, the City issued a solicitation for engineering, permitting, and construction management for the Herman Road: Teton Ave to Tualatin Rd Project;

WHEREAS, the City advertised the invitation for request for proposals in the *Daily Journal of Commerce* on February 26, 2020, and received five responsive proposals;

WHEREAS, City staff reviewed the responsive proposals and determined Century West Engineering Corporation submitted the best responsive proposal;

WHEREAS, City staff recommended the Council award a Professional Services Agreement to Century West Engineering Corporation to provide engineering services for the Herman Road: Teton Ave to Tualatin Rd Project; with a first phase of preliminary engineering, with planned amendments for detailed engineering and for engineering services during construction.

WHEREAS, funds are budgeted for this Project in the Road Operating Fund, along with funding from Washington County through Metro; and

WHEREAS, the procurement complied with the City's public contracting requirements.

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

**Section 1.** The City awards a Professional Services Agreement for engineering, permitting, and construction management for the Herman Road: Teton Ave to Tualatin Rd Project s to Century West Engineering Corporation for the Herman Rd: Teton Ave to Tualatin Rd Project.

**Section 2.** The City Manager is authorized to execute a Professional Services Agreement with Century West Engineering Corporation in the amount of \$285,929.85 for the first phase of preliminary engineering, with planned amendments for detailed engineering and for engineering services during construction.

**Section 3.** The City Manager is authorized to negotiate additional phases and execute contract amendments up to a total contract price of \$725,000 for all phases.

**Section 4.** This resolution is effective upon adoption.

Adopted by the City Council this 10<sup>th</sup> day of August, 2020.

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:** Don Hudson, Assistant City Manager/Finance Director  
**DATE:** August 10, 2020

---

**SUBJECT:**

Consideration of Resolution No. 5514-20, A Resolution Authorizing the City Manager to Execute an Intergovernmental Agreement (IGA) with Washington County for City and Special District Assistance Program

**RECOMMENDATION:**

Staff Recommends that the City Council adopt the attached Resolution.

**EXECUTIVE SUMMARY:**

On March 27, 2020 the Coronavirus Aid, Relief and Economic Security Act (CARES Act) became law and established the Coronavirus Relief Fund to make payments to eligible units of local government, including Washington County. Washington County received a payment from the Fund and on June 2, 2020 the Washington County Board of Commissioners approved the distribution of \$7,000,000 from the County's allocation to reimburse cities and special districts within the County for necessary expenses related to the COVID-19 public health emergency.

The City of Tualatin applied for an allocation from the City and Special District Assistance Program and was awarded an amount not to exceed \$617,969 for expenses already incurred, or to be incurred before November 15, 2020, due to the COVID-19 public health emergency. Eligible expenses will be reimbursed by the County after submittal by the City and reviewed and approved by the County.

**OUTCOMES OF DECISION:**

Adoption of the attached resolution authorizes the City Manager to execute the IGA with Washington County and allows the City to participate in the City and Special District Assistance Program.

**FINANCIAL IMPLICATIONS:**

Execution of the IGA allows the City to be reimbursed up to \$617,969 for COVID-19 related expenses.

---

**ATTACHMENTS:**

- Resolution No. 5514-20
- Intergovernmental Agreement with Washington County



RESOLUTION NO. 5514-20

A RESOLUTION AUTHORIZING THE CITY MANAGER TO EXECUTE AN INTERGOVERNMENTAL AGREEMENT WITH WASHINGTON COUNTY FOR CITY AND SPECIAL DISTRICT ASSISTANCE PROGRAM

WHEREAS, ORS 190.110 et seq., authorizes the City to enter into Intergovernmental Agreements with other government entities;

WHEREAS, on March 27, 2020 the Coronavirus Aid, Relief, and Economic Security Act (CARES Act) became law and established the \$150 billion Coronavirus Relief Fund (Fund) to make payments to eligible units of local government, including Washington County;

WHEREAS, Washington County received a payment from the Fund and on June 2, 2020, the Washington County Board of Commissioners approved the distribution of \$7,000,000 from the County's allocation of the Fund to reimburse cities and special districts within Washington County for necessary expenses related to the COVID-19 public health emergency; and

WHEREAS, the City of Tualatin has applied for allocation of a portion of the City and Special District Assistance Program funds as a subrecipient under the CARES Act to cover expenses already incurred or to be incurred due to the COVID-19 public health emergency;

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

**Section 1.** The City Manager is authorized to execute an Intergovernmental Agreement (IGA) with Washington County for City and Special District Assistance Program, which is attached as Exhibit A.

**Section 2.** This resolution is effective upon adoption.

ADOPTED by the City Council this 10<sup>th</sup> day of August, 2020.

CITY OF TUALATIN, OREGON

BY \_\_\_\_\_  
Mayor

APPROVED AS TO FORM

ATTEST:

BY \_\_\_\_\_  
City Attorney

BY \_\_\_\_\_  
City Recorder

**INTERGOVERNMENTAL AGREEMENT  
BETWEEN WASHINGTON COUNTY AND CITY OF TUALATIN**  
For City and Special District Assistance Program

This INTERGOVERNMENTAL AGREEMENT (“Agreement”) is made and entered between WASHINGTON COUNTY, a political subdivision of the State of Oregon, acting by and through its elected officials, hereinafter referred to as "County", and CITY OF TUALATIN, acting by and through its elected officials, hereinafter referred to as “City.” County and City may be jointly referred to herein as the “Parties” or individually as a “Party.”

**RECITALS**

1. WHEREAS, ORS 190.010 authorizes units of local government to enter into intergovernmental agreements for the performance of any or all functions and activities that a party to the agreement has the authority to perform; and
2. WHEREAS, on March 8, 2020 the Governor of Oregon declared an emergency under ORS 401.165 *et. seq.* due to the public health threat posed by the novel infectious coronavirus (COVID-19); and
3. WHEREAS, on March 11, 2020, COVID-19, which spreads person-to-person through coughing, sneezing and close personal contact, was declared a pandemic by the World Health Organization; and
4. WHEREAS on March 13, 2020 the President of the United States declared the COVID-19 outbreak a national emergency; and
5. WHEREAS on March 23, 2020, Oregon Governor Kate Brown issued Executive Order 20-12 (EO 20-12) which, among other things, ordered closure and prohibited operation of a wide range of business, restricted the operations of restaurants, bars, brew pubs, wine bars, cafes, food courts, and coffee shops, and required social distancing for other retail businesses; and
6. WHEREAS, on March 27, 2020 the Coronavirus Aid, Relief, and Economic Security Act (CARES Act) became law and established the \$150 billion Coronavirus Relief Fund (Fund) from which the U.S. Department of the Treasury made payments to eligible units of local government, including the County; and
7. WHEREAS, the County received a payment from the Fund which, subject to the requirements of the CARES Act and 2 CFR 200, can be used to reimburse necessary expenses associated with the COVID-19 Public Health Emergency; and

8. WHEREAS, on June 2, 2020, the Washington County Board of Commissioners approved the distribution of \$7,000,000.00 from the County's allocation of the Fund (City and Special District Assistance Program) to reimburse cities and special districts within Washington County for necessary expenses related to COVID-19 public health emergency; and
9. WHEREAS, The Washington County Cities and Special Districts Assistance Program is funded by the CARES (Coronavirus Aid, Relief, and Economic Security) Act Coronavirus Relief Fund (CRF) to provide economic relief to cities and special districts that are located primarily in Washington County for necessary expenses related to the Coronavirus Disease 2019 (COVID-19) public health emergency.
10. WHEREAS the Organization has applied for allocation of a portion of the City and Special District Assistance Program funds as a Subrecipient under the CARES Act to cover expenses already incurred or to be incurred in the form of unbudgeted necessary expenses due to the COVID-19 public health emergency; and
11. WHEREAS, the County desires to provide the City a portion of the City and Special District Assistance Program funds to reimburse the City for unbudgeted expenses for needs made necessary by the COVID-19 public health threat;

## **AGREEMENT**

NOW, THEREFORE, the premises being in general as stated in the foregoing recitals and in consideration of the terms, conditions and covenants set forth below, the parties agree as follows:

### **Article 1      COUNTY OBLIGATIONS**

- 1.1 County shall distribute at total of up to \$617,969 from the City and Special District Assistance funds within ten days of receipt of the required reports including backup documentation for actual incurred expenses from City.
- 1.2 Review all monthly reports and reimbursement requests promptly and request any further clarifying documentation or information from City to verify and approve reports and requests.

### **Article 2      ORGANIZATION OBLIGATIONS**

- 2.1. City may request reimbursement from the County for up to \$617,969 of the City and Special District Assistance funds in their initial report and following monthly reports for actually incurred eligible expenditures.
- 2.2. City shall submit an initial report with reimbursement request no later than August 15th, 2020 to the County for expenditures actually incurred from March 1st, 2020 through July 31st, 2020 to be reimbursed with City and Special

Districts Assistance funds. This report and all other reports shall include copies of all receipts, invoices, payroll reports, or other relevant backup for all expenditures that the award recipient is asking to be reimbursed for. All reports and documentation are to be submitted by email to the Program Coordinator, Christine Thornhill, [Christine\\_Thornhill@co.washington.or.us](mailto:Christine_Thornhill@co.washington.or.us)

- 2.3. City shall submit monthly reports and reimbursement requests on or before the 15th day of each month following the initial report for the previous month's actually incurred expenditures that are to be reimbursed by the County (for example: September 15th's report contains August 1st through August 31st expenditures).
- 2.4. City shall submit a Final report and reimbursement request on or before November 30th, 2020 for expenditures incurred between November 1st, 2020 through November 15th, 2020.
- 2.5. City shall promptly provide any documentation requested by County in relation to the City and Special District Assistance Program.
- 2.6. City shall make available to Washington County Finance a final copy of all City's audits that cover any period during which CARES Act grant funds were expended.
- 2.7. City shall adhere to any and all compliance requirements from the federal government regarding Federal grant funds, as well as any additional guidance or restrictions on the funds instituted by the County.
- 2.8. City shall send updated insurance COI's for the duration of the agreement as they come available to the Contract Administrator, Will Culver, [Will\\_Culver@co.washington.or.us](mailto:Will_Culver@co.washington.or.us)
- 2.9. City will ensure all expenditures covered by the City and Special District Assistance funds will be for programs and program costs that comply with the CARES Act.
- 2.10. City understands and agrees that while a broad range of activities, services and programs may be authorized under the CARES Act, the County recommends City only cover internal expenditures as allowed by the CARES Act. In any case, the City agrees to cover only its own expenditures that may be eligible expenditures under the CARES Act with the City and Special District Assistance funds and may not distribute funds to any other subrecipient for any reason.
- 2.11. City will ensure the monies provided from the City and Special District Assistance funds only and exclusively cover those expenditures and costs already incurred or to be incurred and:

- 2.11.1. Are necessary expenditures incurred due to the public health emergency with respect to the COVID-19 within the meaning the CARES Act; and
  - 2.11.2. Were not accounted for in the City's most recently approved budgets as of March 27, 2020; and
  - 2.11.3. Were incurred during the period that begins March 1, 2020 and ends on November 15th, 2020.
- 2.12. City will not use any of the City and Special District Assistance funds provided by the County as a revenue replacement for lower than expected tax or other revenue collections or for any other purpose not allowed by the CARES Act.
- 2.13. City will ensure all use of the City and Special District Assistance funds will adhere to official federal guidance issued or to be issued on what constitutes a necessary expenditure. City will review the guidance established by the U.S. Department of Treasury and will warrant that all expenditures have met the required guidance.
- 2.14. City will not use the City and Special District Assistance funds for expenditures for which the City has already received any other emergency COVID-19 supplemental funding for the same expenditure.
- 2.15. In the event City uses the City and Special District Assistance funds to reimburse expenditures for a qualifying City and Special District Assistance program expense and subsequently receives or becomes eligible for additional emergency COVID-19 supplemental funding to reimburse the City for the same qualified expended City and Special District Assistance program expense, the City will return the funds to the County, an amount equal to the City and Special District Assistance funds used to cover for the same program or expense within thirty (30) days of receipt of or eligibility verification of, whichever is first, the additional supplemental funds.
- 2.16. City will retain all necessary documentation of all uses of the City and Special District Assistance funds including but not limited to invoices and receipts in a manner consistent with §200.333 Retention requirements for records of 2 CFR 2 Part 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance). Such documentation shall be produced to the County upon request and may be subject to audit by the County or County's authorized agent.
- 2.17. City will comply with all terms in Attachment R, Federal Grant Funds, 2 CFR Part 200, Appendix II.

## **Article 3      GENERAL PROVISIONS**

### **3.1      LAWS OF OREGON**

The parties shall comply with all applicable laws and regulations regarding the handling and expenditure of public funds. This Agreement shall be construed and enforced in accordance with the laws of the State of Oregon.

### **3.2      DEFAULT**

Time is of the essence in the performance of the Agreement. Either party shall be deemed to be in default if it fails to comply with any provisions of this Agreement. The non-defaulting party shall provide the other party with written notice of default and allow thirty (30) days within which to cure the defect.

### **3.3      INDEMNIFICATION**

This Agreement is for the benefit of the parties only. City agrees to indemnify and hold harmless the County, and its elected officials, directors, officers, employees, and agents, from and against all claims, demands and causes of actions and suits of any kind or nature for personal injury, death or damage to property on account of or arising out of services performed, the omissions of services or in any way resulting from the negligent or wrongful acts or omissions of the indemnifying party and its officers, employees and agents. To the extent applicable, the above indemnification is subject to and shall not exceed the limits of liability of the Oregon Tort Claims Act (ORS 30.260 through 30.300). City shall give County immediate written notice of any action or suit filed or any claim made against the County that may result in litigation in any way related to this Agreement. County retains the right, in its discretion, to defend any action with Counsel of this choosing.

### **3.4      INSURANCE**

City shall maintain insurance levels or self-insurance in accordance with ORS 30.282, for the duration of this Agreement at levels necessary to protect against public body liability as specified in ORS 30.269 through 30.274.

### **3.5      MODIFICATION OF AGREEMENT**

No waiver, consent, modification or change of terms of this Agreement shall be binding unless in writing and signed by both Parties. The Parties agree that this Agreement may require modification as additional guidance becomes available.

### **3.6      DISBURSEMENTS REMAIN SUBJECT TO RECOVERY**

All disbursements and payments under this Agreement, remain subject to recovery from City in accordance with the following:

i. Notice of Underexpenditure, Overexpenditure, or Misexpenditure.

If County finds there has been an underexpenditure, overexpenditure or misexpenditure of moneys disbursed under this Agreement, County shall provide City with written notice thereof, with a detailed spreadsheet providing supporting data of an underexpenditure, overexpenditure or misexpenditure, and County and City shall engage in the process described in the Recovery of Underexpenditure, Overexpenditure or Misexpenditure section below.

ii. Recovery of Underexpenditure, Overexpenditure or Misexpenditure.

(a) City's Response. City shall have 90 calendar days from the effective date of the notice of underexpenditure, overexpenditure or misexpenditure or from the date of receipt of the notice, whichever is later, to pay County in full or notify County that it wishes to engage in the appeals process set forth in the Appeals Process section below. If City fails to respond within that 90 calendar-day time period, City shall promptly pay the noticed underexpenditure, overexpenditure or misexpenditure.

(b) Appeals Process. Upon receipt of the final notice, if City notifies County that it wishes to engage in the Appeals Process, City and County shall engage in non-binding discussions to give the City an opportunity to present reasons why it believes that there was no underexpenditure, overexpenditure or misexpenditure, or that the amount of the underexpenditure, overexpenditure or misexpenditure was different than the amount identified by County, and to give County the opportunity to reconsider its notice. City and County may negotiate an appropriate apportionment of responsibility for the repayment of an underexpenditure, overexpenditure or misexpenditure. At City request, County will meet and negotiate with City in good faith concerning appropriate apportionment of responsibility for repayment of an underexpenditure, overexpenditure or misexpenditure. In determining an appropriate apportionment of responsibility, City and County may consider any relevant factors. An example of a relevant factor is the extent to which either party contributed to an interpretation of a statute, regulation or rule prior to the expenditure that was officially reinterpreted after the expenditure. If County and City reach agreement on the amount owed to County, City shall promptly repay that amount to County by issuing payment to County. If County and City are unable to agree to whether there has been an underexpenditure, overexpenditure or misexpenditure or as to the amount

owed, the parties may agree to consider further appropriate dispute resolution processes, including mediation and arbitration.

### 3.7 DISPUTE RESOLUTION

The Parties shall attempt to informally resolve any dispute concerning any Party's performance or decisions under this Agreement, or regarding the terms, conditions or meaning of this Agreement. A neutral third party may be used if the parties agree to facilitate these negotiations. In the event of an impasse in the resolution of any dispute, the issue shall be submitted to the governing bodies of both parties for a recommendation or resolution.

### 3.8 REMEDIES

Subject to the provisions in paragraph 3.6 and 3.7, any Party may institute legal action to cure, correct or remedy any default, to enforce any covenant or agreement herein, or to enjoin any threatened or attempted violation of this Agreement. All legal actions shall be initiated in Washington County Circuit Court. The Parties, by signature of their authorized representatives below, consent to the personal jurisdiction of that court.

### 3.9 EXCUSED PERFORMANCE

In addition to the specific provisions of this Agreement, performance by any party shall not be in default where delay or default is due to war, insurrection, strikes, walkouts, riots, floods, drought, earthquakes, fires, casualties, acts of GOD, governmental restrictions imposed on or mandated by governmental entities other than the parties, enactment of conflicting state or federal laws or regulations, new or supplementary environmental regulation, litigation or similar bases for excused performance that are not within the reasonable control to the party to be excused.

### 3.10 SEVERABILITY

If any one or more of the provisions contained in this Agreement is invalid, illegal or unenforceable in any respect, the validity, legality and enforceability of the remaining provisions of the Agreement will not be affected or impaired in any way.

### 3.11 INTEGRATION

This Agreement is the entire agreement of the parties on its subject and supersedes any prior discussions or agreements regarding the same subject.

## **Article 5 TERM OF AGREEMENT and SURVIVAL**

5.1 This Agreement becomes effective on the last date signed below and shall



terminate on December 30th, 2020, unless extended by mutual written consent of the Parties.

5.2 City Obligations 2.15, 2.16 and 2.17 and General Provisions 3.3, 3.6 and 3.8 shall survive termination or expiration of this Agreement.

DATED this \_\_\_\_\_ day of \_\_\_\_\_, 2020.

WHEREAS, all the aforementioned is hereby agreed upon by the parties and executed by the duly authorized signatures below.

**WASHINGTON COUNTY, OREGON**

**CITY OF TUALATIN, OREGON**

\_\_\_\_\_  
CAO

\_\_\_\_\_  
CITY MANAGER

\_\_\_\_\_  
DATE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
RECORDING SECRETARY

\_\_\_\_\_  
CITY RECORDER

APPROVED AS TO FORM:

\_\_\_\_\_  
Cortney Duke-Driessen  
Sr. Assistant County Counsel

\_\_\_\_\_  
City Attorney

\_\_\_\_\_  
DATE

\_\_\_\_\_  
DATE

## ATTACHMENT R

### COVID-19 RESPONSE

**Required for all Agreements that are funded in whole or in part by Federal Grant Funds**

**Clauses required in non-Federal entity's contracts**

**Source: 2 CFR Part 200, Appendix II**

- I. **City of Tualatin (Recipient) shall comply with all applicable provisions below.**
- (A) **Administrative, contractual, or legal remedies** are addressed in the Intergovernmental Agreement (Term 3.3, 3.4 and 5.1) as well as any other applicable provisions in the Agreement and Attachments
- (B) **Termination provisions** are addressed in the Intergovernmental Agreement (Term 5.1) as well as any other applicable provisions in the Agreement and Attachments
- (C) **Equal Employment Opportunity.** Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of “federally assisted construction contract” in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 CFR part 60, “Office of Federal Opportunity,” and implementing regulations at 41 CFR part 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.”
- (D) **Davis-Bacon Act, as amended (40 U.S.C. 3141-3148).** If required by the federal funding source and if this Agreement is a prime construction contract in excess of \$2,000, Recipient shall comply with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5 “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). If this section applies, Recipient must pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, Recipient must pay wages not less than once a week. If applicable, the County will place a copy of the current prevailing wage determination issued by the Department of Labor in the solicitation. The decision to award a Contract is conditioned upon the acceptance of the wage determination. If

applicable, the County will place a copy of the current prevailing wage determination issued by the Department of Labor in the solicitation. If applicable, Recipient must accept the wage determination. If applicable, County will report all suspected or reported violations by Recipient to the Federal awarding agency. If applicable, Recipient must comply with the Copeland “Anti-Kickback” Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, “Government Entities and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each Recipient is prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. If applicable, County will report all suspected or reported violations by Recipient to the Federal awarding agency.

**(E) Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708).** If the amount of this contract exceeds \$100,000 and involves the employment of mechanics or laborers Recipient shall comply with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, if applicable, Recipient shall compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

**(F) Rights to Inventions Made Under a Contract or Agreement.** If the funding for this Contract meets the definition of “funding agreement” under 37 CFR 401.2(a) and Contract is a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under this Agreement, Recipient must comply with the requirements of 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the federal awarding agency.

**(G) Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387).** If the amount of this contract exceeds \$150,000 Recipient shall comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations shall be reported to the Federal awarding agency and

the Regional Office of the Environmental Protection Agency (EPA).

**(H) Debarment and Suspension (Executive Orders 12549 and 12689).**

Government Entity Certification Regarding Debarment, Suspension, Proposed Debarment and other Responsibility Matters. The Government Entity certifies to the best of its knowledge and belief that neither it nor any of its principals:

15.1 Are presently debarred, suspended, proposed for debarment, or declared ineligible from submitting bids or proposals by any federal, state or local entity, department or agency;

15.2 Have within a three-year period preceding this offer, been convicted or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performance of a public (Federal, state or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statement, tax evasion, or receiving stolen property;

15.3 Are presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph 15.2 of this certification;

15.4 Have within a three-year period preceding this offer, had one or more contracts terminated for default by any Federal, state or local public agency.

15.5 Are on the list titled "Specially Designated Nationals and Blocked Persons" maintained by the Office of Foreign Assets Control of the United States Department of the Treasury and currently found at:  
<http://www.treas.gov/offices/enforcement/ofac/sdn/t11sdn.pdf>

15.6 Are out of compliance with the tax laws of Oregon and all tax laws of political subdivisions of the State of Oregon, including, but not limited to, ORS 305.620 and ORS chapters 316, 317 and 318. Washington County may terminate the contract if Government Entity fails to comply with any tax laws during the term of the contract.

**(I) 2 CFR Section 200.322 Procurement of recovered materials.** Government Entity must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

**(J) Byrd Anti-Lobbying Amendment (31 U.S.C. 1352) By signing this Agreement, the Recipient certifies, to the best of the Recipient's knowledge and belief that:**

- a. No federal appropriated funds have been paid or will be paid, by or on behalf of Recipient, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any federal contract, grant, loan or cooperative agreement.
- b. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan or cooperative agreement, the Recipient shall complete and submit Standard Form LLL, "Disclosure Form to Report Lobbying" in accordance with its instructions.
- c. The Recipient shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients and subcontractors shall certify and disclose accordingly.
- d. This certification is a material representation of fact upon which reliance was placed when this Agreement was made or entered into. Submission of this

certification is a prerequisite for making or entering into this Agreement imposed by section 1352, Title 31 of the U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

- e. No part of any federal funds paid to Recipient under this Agreement shall be used, other than for normal and recognized executive legislative relationships, for publicity or propaganda purposes, for the preparation, distribution before the United States Congress or any State or local legislature itself, or designed to support or defeat any proposed or pending regulation, administrative action, or order issued by the executive branch of any State or local government.
- f. No part of any federal funds paid to Recipient under this Agreement shall be used to pay the salary or expenses of any grant or contract recipient, or agent acting for such recipient, related to any activity designed to influence the enactment of legislation, appropriations, regulation, administrative action, or Executive Order proposed or pending before the United States Congress or any State government, State legislature or local legislature or legislative body, other than for normal and recognized executive-legislative relationships or participation by an agency or officer of a State, local or tribal government in policymaking and administrative processes within the executive branch of that government.
- g. The prohibitions in subsections 5 and 6 of this section shall include any activity increase, or any proposed, pending, or future requirement or restriction on any legal consumer product, including its sale or marketing, including but not limited to the advocacy or promotion of gun control.
- h. No part of any federal funds paid to Recipient under this Agreement may be used for any activity that promotes the legalization of any drug or other substance included in schedule I of the schedules of controlled substances established under section 202 of the Controlled Substances Act except for normal and recognized executive congressional communications. This limitation shall not apply when there is significant medical evidence of a therapeutic advantage to the use of such drug or other substance or that federally sponsored clinical trials are being conducted to determine therapeutic advantage.

II. **FEMA Required Language:**

- (A) To be eligible for FEMA assistance under the County's FEMA grant or cooperative agreement, the cost of the change, modification, change order, or construction change must be allowable, allocable, within the scope of the County's grant or cooperative

agreement, and for the completion of project scope. All changes to this Agreement to alter the method, price or schedule of work must be approved by written amendment to this Agreement signed by both parties.

(B) Access to Records: In addition to any other term or condition regarding access to records in this Agreement, Government Entity agrees to provide the FEMA administrator, the Comptroller General of the United States, or any of their authorized representatives access to any books, documents, papers, and records of the Government Entity which are directly pertinent to this Agreement for the purposes of making audits, examinations, excerpts, and transcripts. The Government Entity agrees to permit any of the foregoing parties to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed. The Government Entity agrees to provide the FEMA Administrator or his/her authorized representatives access to construction or other work sites pertaining to the work being completed under the Agreement.

(C) Government Entity shall not use the Department of Homeland Security (DHS) seal(s), logos, crests, or reproductions of flags or likenesses of DHS agency officials without specific FEMA pre-approval.

(D) Government Entity acknowledges that FEMA financial assistance will be used to fund this Agreement only and can be used for no other purposes. Government Entity will comply with all applicable federal law, regulations, executive orders, FEMA policies, procedures, and directives.

(E) The Federal Government is not a party to this Agreement and is not subject to any obligations or liabilities to the County, Government Entity, or any other party pertaining to any matter resulting from this Agreement.

(F) Government Entity acknowledges that 31 USC Chapter 38 (Administrative Remedies for False Claims and Statements) applies to Government Entity's actions pertaining to this Agreement.

**III. HIPAA Compliance.** If the work performed under this Contract is covered by the Health Insurance Portability and Accountability Act or the federal regulations implementing the Act (collectively referred to as HIPAA), Government Entity agrees to perform the work in compliance with HIPAA.

**ATTACHMENT R**  
**Intergovernmental Agreement ONLY**  
**COVID-19 RESPONSE**

**Required for all Agreements that are funded in whole or in part by Federal Grant Funds**  
**Clauses required in non-Federal entity's contracts**  
**Source: 2 CFR Part 200, Appendix II**

**Catalog of Federal Domestic Assistance (CFDA) number(s) of federal funds to be paid through this Agreement: 21.019**

**Contractor or Sub-Recipient Determination - Washington County determines that:**

Recipient is a sub-recipient;                      OR                       Recipient is a contractor

**AUDIT CLAUSES**

Recipient shall comply with the following applicable provisions below.

**Audits/Costs**

- A. Recipients receiving federal funds in excess of \$750,000 from all sources in the Recipient's fiscal year are subject to audit conducted in accordance with the provisions of 2 CFR part 200, subpart F. Subrecipient, if subject to this requirement shall at Recipient's own expense submit to County a copy of, or electronic link to, its annual audit subject to this requirement covering the funds expended under this Agreement and shall submit or cause to be submitted to County the annual audit of any subrecipients(s), contractor(s), or subcontractor(s) of Subrecipient responsible for the financial management of funds received under this Agreement.
- B. Audit costs for audits not required in accordance with 2 CFR part 200, subpart F are unallowable. If Subrecipient did not expend \$750,000 or more in Federal funds in its fiscal year, but contracted with a certified public accountant to perform and audit, costs for performance of that audit shall not be charged to the grant.
- C. Subrecipient shall save, protect and hold harmless County from the cost of any audits or special investigations performed by the Federal awarding agency or any federal agency with respect to the funds expended under this Agreement. Subrecipient acknowledges and agrees that any audit costs incurred by Subrecipient as a result of allegations of fraud, waste or abuse are ineligible for reimbursement under this or any other agreement between Subrecipient and the County.

**Maintenance of Financial Records**

Recipient must maintain auditable financial records per generally accepted accounting principles and in accordance with OAR 309-013-0075 through 0220 and in sufficient detail to permit County or the State to verify how any payments received under this Agreement were expended.



## **Attachment R**

### **Access to Records**

Recipient agrees to permit a program reviewer or an auditor of the Federal, State, or County government or their agents to have access to records and financial statements as may be necessary. Access to records by the County or State may be with notice or without notice. Any refunds to or disallowances by the Federal Government, the State, or the County resulting from audits shall be the sole responsibility of Recipient for payment to the Federal Government, the State, or the County.

### **Cost Principles**

The parties agree to comply with any applicable cost principles established for determining the allowable costs incurred as set forth in 2 CFR 200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards), OR circulars superseded by 2 CFR 200 (OMB Circular A-87 (State and Local Governments), OMB Circular A-122 (Nonprofit Organizations), OMB Circular A-21 (Institutions of Higher Learning), 45 CFR Part 74 (Appendix E Hospitals), FAR 48 Subpart 31.2 (For profit Organizations). The parties further agree to comply with, as applicable, the administrative standards for grants set forth in 2 CFR 200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards).

### **Financial Reports**

Recipients determined to be sub-recipients of Federal funds who receive Federal awards during the current contract year from County shall provide County with a Financial Report prepared in accordance with generally accepted accounting principles upon which an independent certified public accountant has expressed an opinion. Such report shall account for funds received during the County's fiscal year, July 1 through June 30, or any part of the County's fiscal year occurring during the term of this Agreement. The report must be submitted within six months of the Recipient's fiscal year end. If the Recipient is unable to meet the deadline, they may request, in writing, an extension of up to three months. Failure to provide County with the annual Financial Report may result in withholding of payments due to the Recipient or termination of this agreement. If the Recipient has a different fiscal year from the County, then the report shall account for funds received during the Recipient's fiscal year.

### **Expenditure Records**

Recipient shall document the expenditure of all funds paid to Recipient under this Agreement. Unless applicable federal law requires Recipient to utilize a different accounting system, Recipient shall create and maintain all expenditure records in accordance with generally accepted accounting principles and in sufficient detail to permit County to verify how the funds paid to Recipient under this contract were expended.

## Attachment R

I. **Government Entity (Recipient) shall comply with all applicable provisions below.**

- (A) **Administrative, contractual, or legal remedies** are addressed in the Intergovernmental Agreement (Sections 6, 8, 9, and 10) as well as any other applicable provisions in the Agreement and Attachments
- (B) **Termination provisions** are addressed in the Intergovernmental Agreement (Section 6) as well as any other applicable provisions in the Agreement and Attachments
- (C) **Equal Employment Opportunity.** Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of “federally assisted construction contract” in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 CFR part 60, “Office of Federal Opportunity,” and implementing regulations at 41 CFR part 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.”
- (D) **Davis-Bacon Act, as amended (40 U.S.C. 3141-3148).** If required by the federal funding source and if this Agreement is a prime construction contract in excess of \$2,000, Recipient shall comply with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5 “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). If this section applies, Recipient must pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, Recipient must pay wages not less than once a week. If applicable, the County will place a copy of the current prevailing wage determination issued by the Department of Labor in the solicitation. The decision to award a Contract is conditioned upon the acceptance of the wage determination. If applicable, the County will place a copy of the current prevailing wage determination issued by the Department of Labor in the solicitation. If applicable, Recipient must accept the wage determination. If applicable, County will report all suspected or reported violations by Recipient to the Federal awarding agency. If applicable, Recipient must comply with the Copeland “Anti-Kickback” Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, “Government Entities and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each Recipient is prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. If applicable, County will report all suspected or reported violations by Recipient to the Federal awarding agency.
- (E) **Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708).** If the amount of this contract exceeds \$100,000 and involves the employment of mechanics or laborers Recipient shall comply with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR

## Attachment R

Part 5). Under 40 U.S.C. 3702 of the Act, if applicable, Recipient shall compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

**(F) Rights to Inventions Made Under a Contract or Agreement.** If the funding for this Contract meets the definition of “funding agreement” under 37 CFR 401.2(a) and Contract is a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under this Agreement, Recipient must comply with the requirements of 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the federal awarding agency.

**(G) Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387).** If the amount of this contract exceeds \$150,000 Recipient shall comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations shall be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

**(H) Debarment and Suspension (Executive Orders 12549 and 12689).**

Government Entity Certification Regarding Debarment, Suspension, Proposed Debarment and other Responsibility Matters. The Government Entity certifies to the best of its knowledge and belief that neither it nor any of its principals:

- a. Are presently debarred, suspended, proposed for debarment, or declared ineligible from submitting bids or proposals by any federal, state or local entity, department or agency;
- b. Have within a three-year period preceding this offer, been convicted or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performance of a public (Federal, state or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statement, tax evasion, or receiving stolen property;
- c. Are presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph 15.2 of this certification;
- d. Have within a three-year period preceding this offer, had one or more contracts terminated for default by any Federal, state or local public agency.

## Attachment R

- e. Are on the list titled “Specially Designated Nationals and Blocked Persons” maintained by the Office of Foreign Assets Control of the United States Department of the Treasury and currently found at: <http://www.treas.gov/offices/enforcement/ofac/sdn/t11sdn.pdf>
- f. Are out of compliance with the tax laws of Oregon and all tax laws of political subdivisions of the State of Oregon, including, but not limited to, ORS 305.620 and ORS chapters 316, 317 and 318. Washington County may terminate the contract if Government Entity fails to comply with any tax laws during the term of the contract.

**(I) 2 CFR Section 200.322 Procurement of recovered materials.** Government Entity must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

**(J) Byrd Anti-Lobbying Amendment (31 U.S.C. 1352) By signing this Agreement, the Recipient certifies, to the best of the Recipient's knowledge and belief that:**

- a. No federal appropriated funds have been paid or will be paid, by or on behalf of Recipient, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any federal contract, grant, loan or cooperative agreement.
- b. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan or cooperative agreement, the Recipient shall complete and submit Standard Form LLL, “Disclosure Form to Report Lobbying” in accordance with its instructions.
- c. The Recipient shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients and subcontractors shall certify and disclose accordingly.
- d. This certification is a material representation of fact upon which reliance was placed when this Agreement was made or entered into. Submission of this certification is a prerequisite for making or entering into this Agreement imposed by section 1352, Title 31 of the U.S. Code. Any

## Attachment R

person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

- e. No part of any federal funds paid to Recipient under this Agreement shall be used, other than for normal and recognized executive legislative relationships, for publicity or propaganda purposes, for the preparation, distribution before the United States Congress or any State or local legislature itself, or designed to support or defeat any proposed or pending regulation, administrative action, or order issued by the executive branch of any State or local government.
- f. No part of any federal funds paid to Recipient under this Agreement shall be used to pay the salary or expenses of any grant or contract recipient, or agent acting for such recipient, related to any activity designed to influence the enactment of legislation, appropriations, regulation, administrative action, or Executive Order proposed or pending before the United States Congress or any State government, State legislature or local legislature or legislative body, other than for normal and recognized executive-legislative relationships or participation by an agency or officer of a State, local or tribal government in policymaking and administrative processes within the executive branch of that government.
- g. The prohibitions in subsections 5 and 6 of this section shall include any activity increase, or any proposed, pending, or future requirement or restriction on any legal consumer product, including its sale or marketing, including but not limited to the advocacy or promotion of gun control.
- h. No part of any federal funds paid to Recipient under this Agreement may be used for any activity that promotes the legalization of any drug or other substance included in schedule I of the schedules of controlled substances established under section 202 of the Controlled Substances Act except for normal and recognized executive congressional communications. This limitation shall not apply when there is significant medical evidence of a therapeutic advantage to the use of such drug or other substance or that federally sponsored clinical trials are being conducted to determine therapeutic advantage.

### II. **FEMA Required Language:**

(A) To be eligible for FEMA assistance under the County's FEMA grant or cooperative agreement, the cost of the change, modification, change order, or construction change must be allowable, allocable, within the scope of the County's grant or cooperative agreement, and for the completion of project scope. All changes to this Agreement to alter the method, price or schedule of work must be approved by written amendment to this Agreement signed by both parties.

(B) Access to Records: In addition to any other term or condition regarding access to records in this Agreement, Government Entity agrees to provide the FEMA administrator, the Comptroller General of the United States, or any of their authorized representatives access to any books, documents, papers, and records of the Government Entity which are directly pertinent to this Agreement for the purposes of making audits, examinations, excerpts, and transcripts. The Government Entity agrees to permit any of the foregoing parties to reproduce by any means whatsoever or to copy excerpts and transcriptions as

## **Attachment R**

reasonably needed. The Government Entity agrees to provide the FEMA Administrator or his/her authorized representatives access to construction or other work sites pertaining to the work being completed under the Agreement.

- (C) Government Entity shall not use the Department of Homeland Security (DHS) seal(s), logos, crests, or reproductions of flags or likenesses of DHS agency officials without specific FEMA pre-approval.
- (D) Government Entity acknowledges that FEMA financial assistance will be used to fund this Agreement only and can be used for no other purposes. Government Entity will comply with all applicable federal law, regulations, executive orders, FEMA policies, procedures, and directives.
- (E) The Federal Government is not a party to this Agreement and is not subject to any obligations or liabilities to the County, Government Entity, or any other party pertaining to any matter resulting from this Agreement.
- (F) Government Entity acknowledges that 31 USC Chapter 38 (Administrative Remedies for False Claims and Statements) applies to Government Entity's actions pertaining to this Agreement.

*III. **HIPAA Compliance**.* If the work performed under this Contract is covered by the Health Insurance Portability and Accountability Act or the federal regulations implementing the Act (collectively referred to as HIPAA), Government Entity agrees to perform the work in compliance with HIPAA.

## Attachment R

### Information Required by 2 CFR 200.331 (a)

1. CFDA Number: **21.019**  
CFDA Name: **CARES Act - Coronavirus Relief Fund**  
Amount: **\$ 0.00**
2. Federal Award Identification:
- i. Contractor name (must match DUNS name):  

---
  - ii. Contractor DUNS number:  

---
  - iii. Federal Award Identification Number (FAIN): **N/A**
  - iv. Federal Award Date: **March 27, 2020**
  - v. Sub-Award Period of Performance Start/End Dates: From: \_\_\_\_\_ To: \_\_\_\_\_
  - vi. Total Amount of Federal Funds Obligated by this Agreement: **\$ 0.00**
  - vii. Total Amount of Federal Award Obligated to the Subrecipient by the pass-through Entity: **\$ 0.00**
  - viii. Total Amount of Federal Award Committed to the Subrecipient by the pass-through Entity: **\$ 0.00**
  - ix. Federal Award Project Description:  

---
  - x. Name of Federal Awarding Agency, pass-through Entity, and contact information for awarding official of the pass-through entity:
    - a. Name of Federal Awarding Agency: **U. S. Treasury**
    - b. Name of pass-through Entity: **Washington County, OR**
    - c. Contact information for awarding official of the pass-through Entity:  
**Sia Lindstrom sia\_lindstrom@co.washington.or.us**
  - xi. Washington County Program Name:  

---
  - xii. Is Award R&D? Yes
  - xiii. Indirect Cost Rate for Federal Award: **0%**



City of Tualatin

## CITY OF TUALATIN Staff Report

**TO:** Honorable Mayor and Members of the City Council

**THROUGH:** Sherilyn Lombos, City Manager

**FROM:** Ross Hoover, Parks and Recreation Director  
Rich Mueller, Parks Planning and Development Manager

**DATE:** August 10, 2020

---

**SUBJECT:**

Consideration of **Resolution No. 5515-20** Authorizing the City Manager to Execute a Deed Acquiring Riverfront Property for the Tualatin River Greenway.

**RECOMMENDATION:**

Staff recommends that the Council approve Resolution No. 5515-20 for the purchase of Hazelbrook Estates Property, Tract B for the Tualatin River Greenway.

**EXECUTIVE SUMMARY:**

The City received a completed application for a proposed subdivision to be known as Hazelbrook Estates, 10605 Hazelbrook Road (TLID 2S115DA00300) on December 20, 2017. The applicable Tualatin Development Code (TDC) allows the City to purchase a tract in the subdivision along the Tualatin River for future construction of the Tualatin River Greenway Trail.

The property is located in the City of Tualatin boundaries, and the property owner has recorded the Hazelbrook Estates Subdivision Compliance Agreement, which includes sale of riverbank greenway Tract B to the City. The Subdivision Review Findings and Decision for SB 17-0001, Hazelbrook Estates includes the condition for the sale of the riverfront greenway to the City.

**FINANCIAL IMPLICATIONS:**

For the property affected, the City's offering price was based on appraisal performed by Real Estate Services Group, Inc. The riverbank greenway tract is 11,809 square feet (.27 acre). The property acquisition from Robert and Mary Bosak to be known as Hazelbrook Estates is based on an appraised value of \$10,000, and Clean Water Services requirement vegetated corridor enhancement costing \$1,342 for a sale price of \$11,342 plus closing costs.

---

**ATTACHMENTS:**

Resolution No.  
Property Appraisal  
Hazelbrook Estates Property Exhibit



RESOLUTION NO. 5515-20

A RESOLUTION AUTHORIZING THE CITY MANAGER TO EXECUTE DEED ACQUIRING RIVERFRONT PROPERTY FOR THE TUALATIN RIVER GREENWAY

WHEREAS, the Tualatin River Greenway is a natural area with regional multi use off road pedestrian and bike trail for recreation and active transportation;

WHEREAS, the City has identified the need to acquire riverfront greenway properties in order to facilitate the future construction of the Tualatin River Greenway Trail; and

WHEREAS, the City has negotiated property transactions with a seller to acquire Tract B of the Hazelbrook Estates Subdivision.

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

**Section 1.** The City Manager is authorized to acquire and execute deed for the following property:

A. Tract B of Tax Lot 2S115DA00300 - Bosak Property for \$11,342

**Section 2.** The City Manager is hereby authorized to execute any and all documents necessary to acquire property and property interests identified in Section 1.

**Section 3.** This resolution is effective upon adoption.

INTRODUCED and ADOPTED by the City Council this 10<sup>th</sup> day of August, 2020.

CITY OF TUALATIN, OREGON

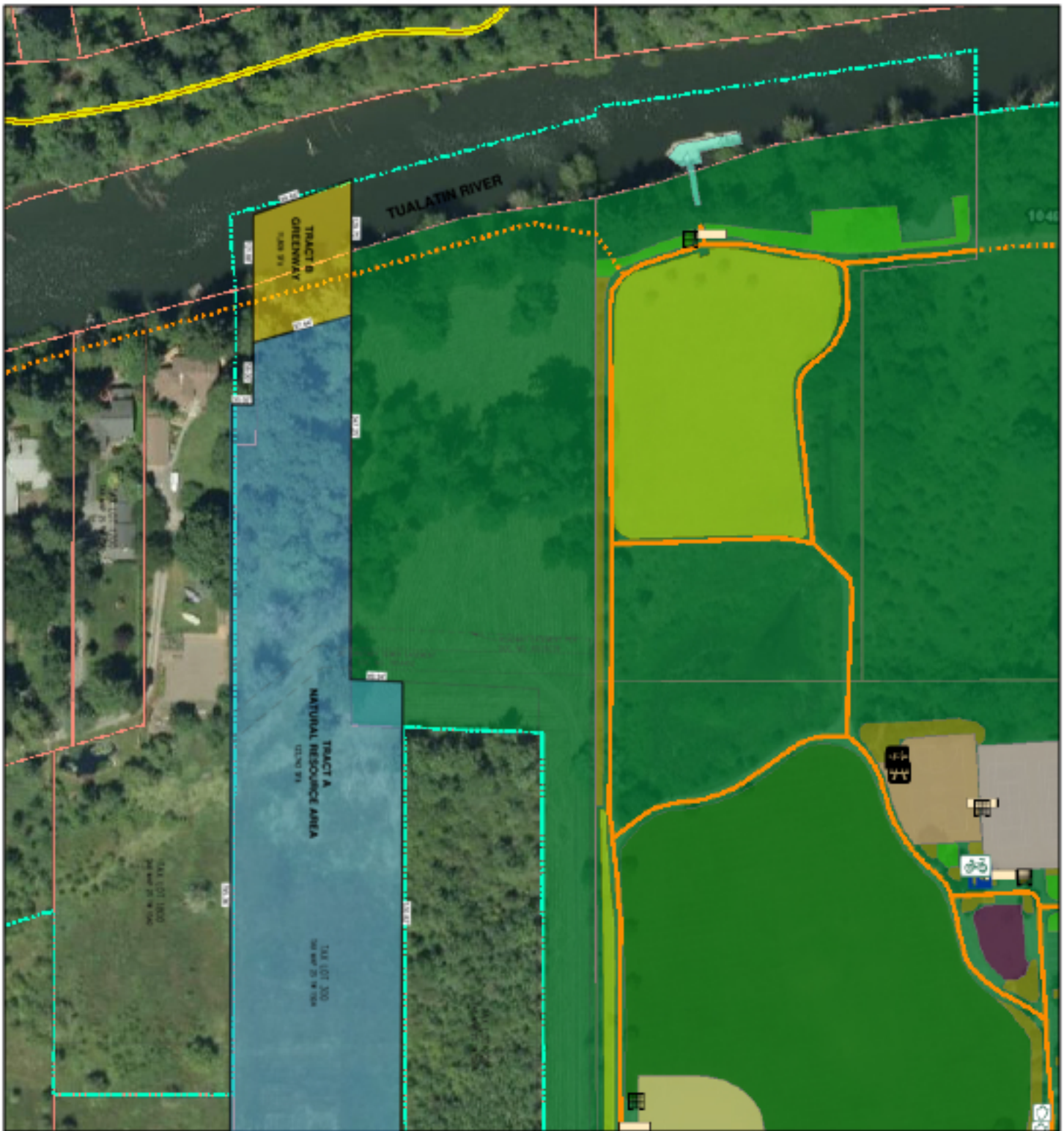
BY \_\_\_\_\_  
Mayor

APPROVED AS TO FORM

ATTEST:

BY \_\_\_\_\_  
City Attorney

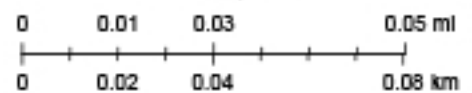
BY \_\_\_\_\_  
City Recorder



6/30/2020, 3:52:57 PM

1:2,257

- |                   |                     |                              |
|-------------------|---------------------|------------------------------|
| Taxlots           | Accessway           | Park Turf                    |
| <b>Park Sites</b> | Shared Use Path     | Rough Mow Turf               |
| Park              | <b>Park Grounds</b> | Sports Turf                  |
| Greenway          | Landscape Bed       | <b>Recreation Facilities</b> |
| Natural Area      | Park Grade Turf     | Baseball Field               |



Source: Esri, Maxar, GeoEye, Earthstar Geographics, CNES/Airbus DS, USDA, USGS, AeroGRID, IGN, and the GIS User Community, Esri, HERE, Garmin, (c) OpenStreetMap contributors, TuiGIS

REAL ESTATE SERVICES GROUP, INC  
*We value the land.*  
MATTHEW LARRABEE, MAI

THIS PAGE IS INTENTIONALLY LEFT BLANK

GREENWAY TRACT B – HAZELBROOK ESTATES  
NORTHERLY EXTREME OF 10605 SW HAZELBROOK  
TUALATIN, OREGON 97062



**PREPARED FOR**

Paul Hennon  
Community Services Director  
City of Tualatin  
18880 SW Martinazzi Avenue  
Tualatin, Oregon 97062

**PREPARED BY**

Matthew Larrabee, M.Arch., MAI  
Real Estate Services Group, Inc.  
10961 NW Crystal Creek  
Portland, Oregon 97229  
Email: [matthew@resg.us](mailto:matthew@resg.us); [Larrabee.MAI@gmail.com](mailto:Larrabee.MAI@gmail.com)  
Phone: 503.799.3374

**EFFECTIVE DATE OF VALUE**

February 16, 2018

**DATE OF REPORT**

March 24, 2018

RESG File No. 18111



March 24, 2018

Paul Hennon  
 Community Services Director  
 City of Tualatin  
 18880 SW Martinazzi Avenue  
 Tualatin, Oregon 97062

Subject: Appraisal of Greenway Tract B at Hazelbrook Estates, Tualatin, Oregon, 97062

Dear Mr. Hennon:

I am pleased to present you with this appraisal of the above referenced property. In the course of this appraisal assignment, I have completed an on-site viewing of the subject site and have analyzed the characteristics of the subject and the market. The subject property consists of a raw 11,809 SF riverfront parcel located at the northern extreme of 10605 SW Hazelbrook, Tualatin, Oregon.

In the course of this appraisal assignment, I have analyzed the characteristics of the subject and its market area. This appraisal has included the research and reporting of market data relevant to the valuation of the subject. The subject property has been valued as though it would be sold on an all-cash or equivalent new mortgage-financing basis. This appraisal complies with the current version of the Uniform Standards of Professional Appraisal Practice (USPAP) and the Code of Ethics of the Appraisal Institute.

Please refer to the Executive Summary pages for the value opinion and other information. Feel free to contact me for any additional information or clarification needed.

Respectfully submitted,

Matthew Larrabee, M.Arch., MAI  
 Certified General Appraiser  
 Oregon State Certification #C000543

TABLE OF CONTENTS

Executive Summary .....	1
<b>GENERAL DATA</b> .....	<b>3</b>
Scope of Work .....	5
Client & Intended User .....	5
Intended Use of the Appraisal .....	6
Property Rights Appraised .....	6
Type of Value / Purpose .....	6
Exposure Period .....	6
Ownership & Recent Sales History .....	6
Definitions .....	7
Regional Location Map .....	8
Regional Description .....	9
Neighborhood Map .....	15
Neighborhood Description .....	16
<b>DESCRIPTION</b> .....	<b>17</b>
Aerial Photograph .....	19
Subject Photographs .....	20
Survey .....	23
Site Analysis .....	24
Highest and Best Use .....	29
<b>VALUATION</b> .....	<b>31</b>
The Appraisal Process .....	33
Sales Comparison Approach .....	33
Comparable Land Sales Data .....	35
Comparable Land Sales Map .....	45
Market Data Adjustment Factors .....	48
Analysis of Comparable Land Sales .....	51
Conclusion of Value .....	54
Certification .....	55
Ordinary Assumptions and Limiting Conditions .....	56
<b>ADDENDA</b> .....	<b>57</b>
Qualifications of the Appraiser	
Subject Property Data	
Zoning Code Excerpt	
Owner Notification	

**EXECUTIVE SUMMARY**

**Effective Date:** February 16, 2018  
**Date of Inspection:** February 16, 2018  
**Date of Report:** March 24, 2018  
**Property Rights Appraised:** Fee Simple

**IDENTIFICATION OF SUBJECT PROPERTY**

**Name/Location:** Greenway Tract B, Hazelbrook Estates  
Northerly Extreme of 10605 SW Hazelbrook  
Tualatin, Washington County, Oregon 97062

**Map & Tax Lot:** Por. of 2S 1W Sec. 15DA Tax Lot 300

**Property ID:** Por. of R523650

**Owner of Record:** Robert E. & Mary C. Bosak

**Site Size:** 11,809 SF or 0.27 Acre

**Site Shape:** Rectangular

**Site Topography:** Level to sloping

**Improvements:** None

**Zoning:** RL (Low-Density Residential)

**Jurisdiction:** City of Tualatin

**Highest & Best Use:** Recreation

**MARKET VALUE SUMMARY**

Market Value as of February 16, 2018

**Market Value in Fee Simple: \$10,000**

Note – As of the effective date of appraisal the subject is part of a larger development parcel and has not yet been created. Thus, this appraisal is subject to the hypothetical condition that the subject is a freestanding legal lot. It is assumed that there are no environmental conditions or contamination that would affect the marketability or value of the subject property. If these premises are shown to be otherwise, the value conclusion could be different.

THIS PAGE IS INTENTIONALLY LEFT BLANK

THIS PAGE IS INTENTIONALLY LEFT BLANK

## GENERAL DATA

#### Scope of Work

- Appraisal and Appraisal Report comply and are consistent with:
  - ✓ Current edition of USPAP (Uniform Standards of Professional Appraisal Practice)
  - ✓ The Code of Ethics of the Appraisal Institute
- Inspection of Subject
  - ✓ The extent of inspection of the subject property is noted in the Certification.
  - ✓ “Inspection” is a term of art and does not imply that a building inspection was performed. It is simply a viewing of the property. Appraiser takes no responsibility as to the serviceability or defects, if any, of the improvements, soils conditions, or of any other detrimental property conditions.
- Review of materials provided by the property owner and public records
- Research, reporting and analysis of market data
  - ✓ Market data has been researched or verified through public sources, brokers’ listings, or other published materials, or with other sources considered reliable, and confirmed with direct participants in the transaction unless otherwise noted. See the Valuation section for the specifics on sales confirmations.
- Personal property, business enterprise value, and other intangible values, if any, are excluded from the scope of work.
- The appraisal of mineral rights is excluded from the scope of work. However, given supply and demand factors, lack of any permits or exploration for minerals on the subject, the delays and high costs of obtaining mining permits, and the market data available, it is highly unlikely and speculative that mineral rights add any value.
- The value of crops, livestock, and timber, if any, is excluded.
- For the purposes of this appraisal, delinquent taxes, local improvement district bonds, SDCs, TIFs, etc. (if any) are considered as liens on the property and are excluded from the analysis of market value.
- The sales comparison approach is utilized to arrive at an opinion of value. A number of sales of comparable parcels in the area were researched and analyzed in support of a value opinion.
- The subject effectively consists of land, and thus a cost approach does not apply.
- The income approach is not necessary to valuing the real estate since there are adequate comparable sales available to provide a credible opinion of value. The rental income received for properties such as the subject is not the primary motivating factor for typical purchasers in this market.

#### Client & Intended User

The client and intended user is the City of Tualatin. There are no other intended users.

#### Intended Use of the Appraisal

The appraisal report is intended only for use by the City of Tualatin in conjunction with the potential acquisition of the identified property rights and is not intended for any other use.

The use of this report is limited solely to the client and for the intended use specified above. All other uses are expressly prohibited. Reliance on this report by anyone other than the client or intended user noted here, or for a purpose not set forth above is prohibited.

#### Ownership of the Documents and Limits of Liability

The appraiser’s and the corporation’s responsibilities are limited solely to the client and solely in the context of the intended use noted below. Liability is limited to the amount of appraisal fees actually collected. This document is an instrument of service, and as such remains the property of the service provider. Possession of this document does not convey ownership of the contents, and copying, distribution (other than to the borrower or other entities as required by law) or conversion into electronic form in whole or in part is prohibited without prior, express written permission of the author. The author reserves the right to charge fees for any additional work expended. Copyright Matthew Larrabee – all rights reserved.

#### Property Rights Appraised

Fee Simple Estate. The value opinion of the fee simple estate considers the encumbrances noted in the title report (if provided), visible on the property, or as reported by the owner.

#### Type of Value / Purpose

To develop and report an opinion of Market Value of the real estate.

#### Exposure Period

Based upon the market sales analyzed in this report, the location, type and size of the subject property, and current market conditions for such properties, a reasonable exposure time for the subject property would be approximately a year or more, if it were to be listed at a reasonable price with a knowledgeable and competent broker and aggressively marketed.

#### Ownership & Recent Sales History

The subject property is owned by Robert E. and Mary C. Bosak based upon public records. There have been no market transfers within the three-year period prior to the effective date of this appraisal and the property is not listed for sale. There is a potential acquisition of the subject by the client. However, no price has been made known to me, and it is understood that the appraisal will be used to inform the price to be offered by the client.

#### Viewing of Subject

The subject was viewed on February 16, 2018 by Mr. Larrabee and Mr. Beaman.

### Definitions

**Market Value** - The following definition of market value is used by agencies that regulate federally insured financial institutions in the United States:

The most probable price which a property should bring in a competitive and open market under all conditions requisite to a fair sale, the buyer and seller each acting prudently and knowledgeably, and assuming the price is not affected by undue stimulus. Implicit in this definition is the consummation of a sale as of a specified date and the passing of title from seller to buyer under conditions whereby:

- Buyer and seller are typically motivated;
- Both parties are well informed or well advised, and acting in what they consider their best interests;
- A reasonable time is allowed for exposure in the open market;
- Payment is made in terms of cash in U.S. dollars or in terms of financial arrangements comparable thereto; and
- The price represents the normal consideration for the property sold unaffected by special or creative financing or sales concessions granted by anyone associated with the sale.

(12 C.F.R. Part 34.42(g); 55 Federal Register 34696, August 24, 1990, as amended at 57 Federal Register 12202, April 9, 1992; 59 Federal Register 29499, June 7, 1994; Title XI of FIRREA)

**Fee Simple Estate** – As defined in *The Dictionary of Real Estate Appraisal* (6<sup>th</sup> Ed.) by the Appraisal Institute, fee simple estate is:

Absolute ownership unencumbered by any other interest or estate, subject only to the limitations imposed by the governmental powers of taxation, eminent domain, police power, and escheat.

**Extraordinary assumptions and hypothetical conditions are defined in USPAP as follows:**

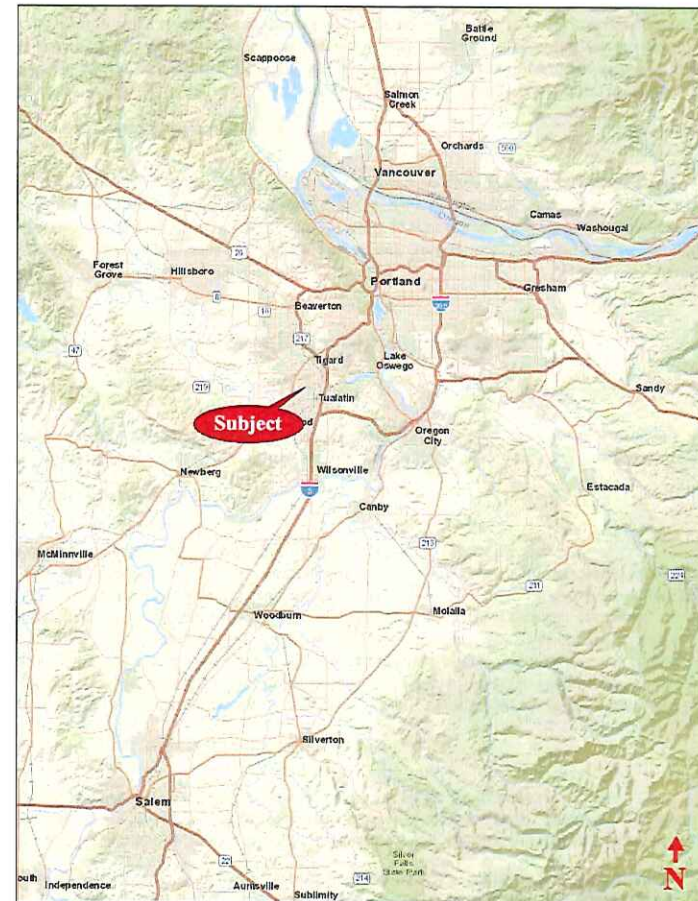
**Extraordinary Assumption:** an assumption, directly related to a specific assignment, as of the effective date of the assignment results, which, if found to be false, could alter the appraiser's opinions or conclusions. Extraordinary assumptions presume as fact otherwise uncertain information about physical, legal, or economic characteristics of the subject property; or about conditions external to the property, such as market conditions or trends; or about the integrity of data used in an analysis.

**Hypothetical Condition:** a condition, directly related to a specific assignment, which is contrary to what is known by the appraiser to exist on the effective date of the assignment results but is used for the purpose of analysis. Hypothetical conditions are contrary to known facts about physical, legal, or economic characteristics of the subject property or about conditions external to the property, such as market conditions or trends; or about the integrity of data used in an analysis.

Extraordinary Assumptions and Hypothetical Conditions, if any, are stated in the Executive Summary and immediately after the conclusion of value.

**Exposure Period and Marketing Time** - Exposure time is the estimated length of time the property interest being appraised would have been offered on the market prior to the hypothetical consummation of a sale at market value on the effective date of the appraisal; in other words, a retrospective estimate based upon an analysis of past market conditions. Marketing time is an estimate of the amount of time it might take to sell a property interest in real estate at the estimated market value during the period immediately after the effective date of an appraisal.

### REGIONAL LOCATION MAP





**REGIONAL DESCRIPTION**

**The Portland Metropolitan Area**

The Portland/Vancouver/Beaverton PMSA is defined by the U.S. Census as these seven counties: Clackamas, Columbia, Multnomah, Washington, Yamhill Counties in Oregon, and Clark and Skamania Counties in the State of Washington. The City of Portland, located in Multnomah County, is the geographical, political and cultural center of the PMSA.

**Population**

According to the 2000 US Census, the Portland MSA was the 23rd largest urban area in the United States with a population of 1,927,881. In the 2010 census, the Portland MSA population was 2,226,009. The 2015 population estimate for the Portland MSA is 2,389,228, an increase of 461,347, or 23.9% since the 2000 Census, and 7.3% since the 2010 census. According to the 2000 census, the population of Oregon was 3,421,399. In the 2010 census, the population of Oregon was 3,831,074. The 2016 population estimate for Oregon was 4,076,350, which represents a 19.1% increase from the 2000 census, and 6.4% since the 2010 census.

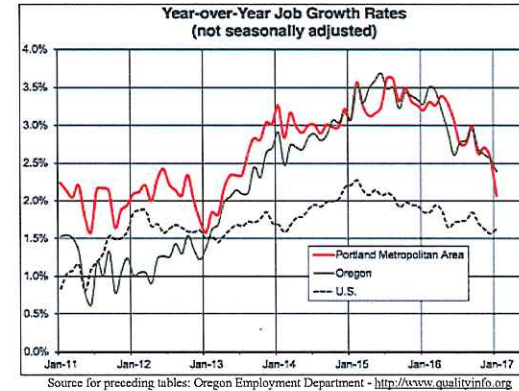
Unemployment Rates			
	Seasonally Adjusted	Raw	
<b>Oregon</b>			
December 2017	4.1%	3.8%	
November 2017	4.2%	3.9%	
December 2016	4.5%	4.2%	
<b>Portland MSA</b>			
December 2017	3.8%	3.6%	
November 2017	3.9%	3.6%	
December 2016	4.3%	4.0%	
Nonfarm Payroll Employment			
	December		
	2017	2016	
Total	1,194,700	1,161,600	
Mining & Logging	1,400	1,300	
Construction	68,600	62,900	
Manufacturing	126,200	121,900	
Trade, Trans., & Utilities	223,600	219,100	
Information	25,300	25,200	
Financial Activities	69,500	69,400	
Professional & Bus. Svc.	181,500	176,700	
Educ. & Health Services	174,500	167,800	
Leisure & Hospitality	121,600	118,500	
Other	41,300	41,600	
Government	161,200	157,200	

The Portland MSA (otherwise referred to in this report as the Portland metropolitan area) comprises the majority of the population in the state of Oregon. Between 1990 and 2000, population in the State of Oregon increased by 20.3%, while the Portland MSA population increased by 26.5%. Approximately 70% of the state's population increase during those ten years occurred in the Portland MSA. The trend continued from 2000 to 2010, with the Portland MSA gaining 15.5%, compared with population growth in the state of Oregon of 12.0%.

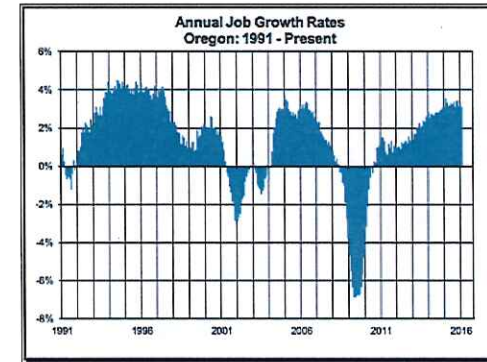
**Employment**

Oregon's seasonally adjusted unemployment rate has continued to improve and stands at 4.1%. The table compares Portland unemployment rates with the State of Oregon and the United States as a whole. Historically, the state had higher unemployment, but its current unemployment rates are close to the nation as a whole. The Portland MSA currently enjoys a seasonally adjusted unemployment rate of only 3.8% of the active workforce.

**Portland Metro Employment Trends**



These charts indicate recent employment trends. Unemployment has declined, and total payroll employment exceeds the pre-recession figure. The Education and Health Services sector and Construction sector added the most jobs over the past year with 6,700 and 5,700 jobs, respectively. All other sectors added jobs over the past year except the Other sector which lost 300 jobs. Government also fared well, adding 4,000 jobs in the past year.



**The Portland Area Housing Market**

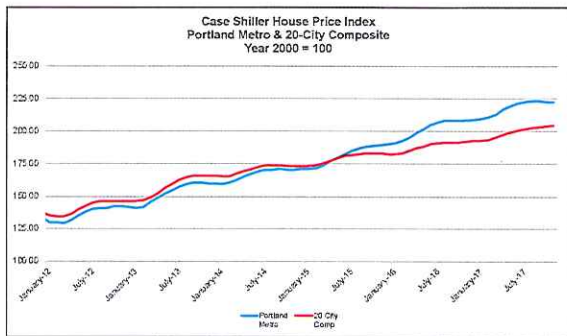
**Home Price Trends:** Nationally recognized economists including Professor Robert Shiller of Yale University have developed the Case-Shiller Home Price Index. This index of price trends shows that prices have increased substantially since the low point of March 2012. Case-Shiller data reflects sales/resales of a large sample of individual homes and is thus regarded as a very reliable measure of price changes, since it is less likely to be skewed by other factors.

The Case Shiller index for Portland reached a peak of 186.51 in July 2007, and its nadir in March 2012 of 129.01, a drop of over 30%. The chart to the right indicates the relative price levels since those dates. The February 2017 price level is well above the peak index number in 2007, and an increase of nearly 73% from the low in 2012. The reader is cautioned that all markets are localized, and the impact varies widely. Close-in neighborhoods have fared better, while outlying areas have been slower to recover. Marketing times are brief, and inventory is limited in well-located areas.

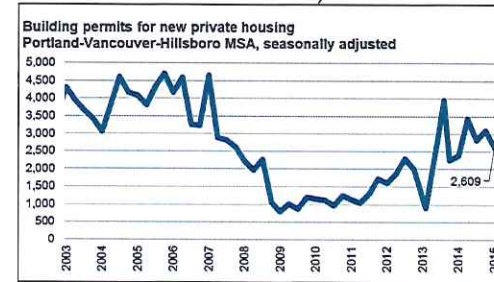
New housing permits declined dramatically after the peak years of 2004-06, but have recently increased, although they have not returned to their pre-recession highs. New homes in the Portland market are aimed at the \$250,000 to \$500,000 price category, where qualified buyers are the most numerous, but new spec homes also being built and sold at higher price points, up to and over \$1 million.

**Case-Shiller Index (Portland Metro)**

Date	Portland Metro	Relative to 3.2012
January-16	190.93	148.0%
February-16	192.34	149.1%
March-16	195.21	151.3%
April-16	198.63	154.0%
May-16	201.85	156.5%
June-16	205.01	158.9%
July-16	207.29	160.7%
August-16	208.23	161.4%
September-16	208.38	161.5%
October-16	208.20	161.4%
November-16	208.50	161.6%
December-16	209.08	162.1%
January-17	209.36	162.3%
February-17	210.98	163.5%
March-17	213.07	165.2%
April-17	216.98	168.2%
May-17	219.68	170.3%
June-17	221.59	171.8%
July-17	222.92	172.8%
August-17	223.25	173.0%
September-17	223.62	173.3%
October-17	222.94	172.8%
November-17	222.95	172.8%



Source: Standard & Poors <http://us.spindices.com/indices/real-estate/sp-case-shiller-or-portland-home-price-index>



Source: Housing Market Analysis, PSU Center for Real Estate, Winter 2014



The December 2017 *Market Action*, which is published by the RMLS (regional multiple listing service) reports that the median sales price for the Portland Metro Area has increased 9.5% during the preceding twelve months to \$380,000 and that the average sales price has increased to \$421,700, as indicated on the table below. The trending data methods used by *RMLS Market Action* tend to vary from Case-Shiller because of their use of long-period moving averages (going back 24 months).

Portland Metro Residential Highlights	New Listings	Pending Sales	Closed Sales	Average Sale Price	Median Sale Price	Total Market Time
<b>2017</b>						
December	1,617	1,757	2,350	421,700	380,000	55
November	2,416	2,371	2,387	425,000	377,000	51
Year-to-date	40,805	31,330	31,624	428,700	379,900	45
<b>2016</b>						
December	1,421	1,757	2,621	399,300	349,900	49
Year-to-date	41,121	33,234	32,798	395,000	347,000	42
<b>Change</b>						
December	13.8%	0.0%	-10.3%	5.6%	8.6%	11.7%
Prev Mo 2017	-33.1%	-25.9%	-1.6%	-0.8%	0.8%	7.8%
Year-to-date	-0.8%	-5.7%	-3.6%	8.5%	9.5%	7.7%

**For-Sale Single Family Housing Inventory:** As noted in *Market Action*, Inventory in Months is calculated by dividing the Active Residential Listings at the end of the month by the number of closed sales for that month. This includes proposed and under construction homes. As can be seen from the following charts, inventory has been below six months since early 2012. This is a positive trend for pricing, since it reflects high demand relative to available supply, placing upward pressure on pricing.

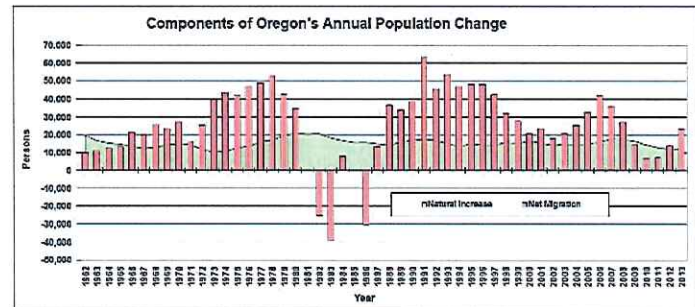
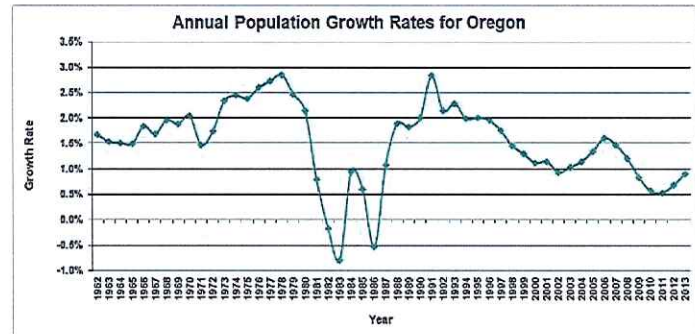
Inventory in Months*			
	2015	2016	2017
January	3.4	1.8	1.7
February	3.0	1.8	1.9
March	1.9	1.3	1.3
April	1.8	1.4	1.7
May	1.7	1.4	1.5
June	1.6	1.5	1.6
July	1.7	1.9	2.1
August	1.9	1.9	2.0
September	1.9	2.0	2.3
October	1.8	2.0	2.1
November	2.0	1.8	1.9
December	1.2	1.3	1.6



Source: RMLS Market Action (Inventories of June 2009-June 2016)

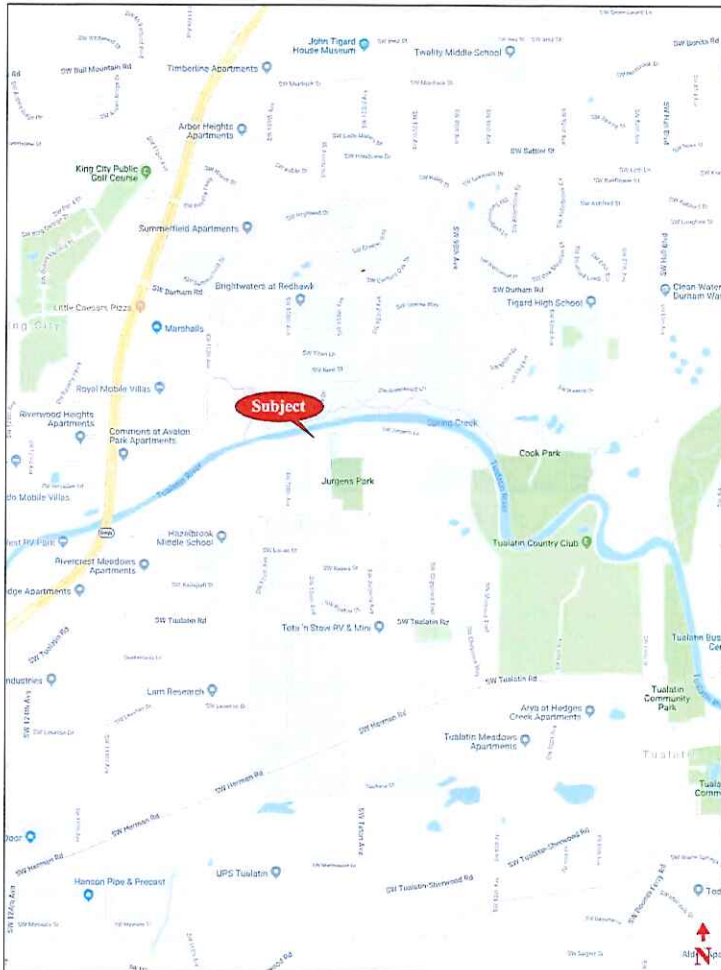
*Declining Housing Inventory Reflects Increased Demand for Single-Family Dwellings and Tighter Supply*

**Statewide Long-Term Population Growth:** The following population charts indicate that, after a period of decline in the rate of growth in statewide population, it has recently recovered. During the growth years of the 1990s and 2000s, a substantial portion of the state's population increase came from in migration from neighboring states, particularly California. Net migration, as indicated on the lower chart, has rebounded after slowing during the recession. Recent increases in population and net migration are positive economic indicators that reflect increased job opportunities in the state.



Source: Population Research Center, PSU, April 2014 <http://www.pdx.edu/prc/annual-oregon-population-report>

NEIGHBORHOOD MAP



NEIGHBORHOOD DESCRIPTION

*Overview* – The subject property is located along the Tualatin River within unincorporated Washington County. Specifically, it is located just outside of the city limits of Tigard and within its urban growth boundary. The neighborhood is located in the southwest portion of the Portland Metropolitan Area and can best be described as an established residential community. The neighborhood boundaries include the Tualatin River to the north and east, SW Tualatin Road to the south and Highway 99W to the west.

*Office* – There is a cluster of newer office buildings at the corner of Highway 99W and SW 124<sup>th</sup> Avenue just to the west of the subject neighborhood. The closest major concentrations of office space are along Kruse Way, north of the subject in Lake Oswego, and in the Tigard Triangle area near the I-5/Hwy 217 interchange. These are characterized by Class A office buildings. In addition, Boones Ferry Road is rapidly becoming a significant office corridor as several new good quality office buildings have been constructed within the past several years. Office buildings along that corridor, while good quality, tend to be smaller than those on Kruse Way, and include medical and professional office users.

*Industrial* – Industrial uses are plentiful with nearly the entire west side of Tualatin devoted to industrial, manufacturing and campus uses. There is also a major warehousing district, which includes large warehouse / distribution centers as well as flex office and auto dealerships west of I-5 along SW 95<sup>th</sup> Avenue between Wilsonville Road and Elligsen Road. In Lake Grove, between Pilkington Road and I-5 is an industrial pocket that features a range of properties that includes small user office/light industrial properties as well as manufacturing plants.

*Retail* – As a commercial corridor, Highway 99 provides the venue for significant retail development. The most intense retail development in the area is located at the intersection of Boones Ferry Road and Interstate 5 roughly 2.8 road miles southeast of the subject. Located at the northeast corner of the intersection is the Southlake Center, which is anchored by Safeway and Dick’s Sporting Goods. The upscale lifestyle shopping center, Bridgeport Village, is located at the northwest quadrant of the interchange. The 29-acre center features 505,000 square feet, more than 44 tenants including anchors such as Crate & Barrel Home Store, Regal Cinemas and upscale shops such as Tommy Bahama, Sur La Table and Ann Taylor Loft. Additional national, regional and local retail uses are located along Tualatin Sherwood Road to the south of the subject Neighborhood.

*Residential* – While the subject’s neighborhood is mature and essentially built-out, there has been substantial growth within the urban growth boundaries of the nearby communities of Tualatin, Tigard, Sherwood and Wilsonville. This has primarily been single family, with a number of denser residential developments as well. Development within the subject’s immediate market area has been in-fill in nature.

*Transportation and Linkages* – SW Hazelbrook Road provides access to Highway 99W at the western extreme of the neighborhood. In addition, Tualatin Sherwood Road provides access to both Interstate 5 and Highway 99W. These roadways in turn provide access to the transportation infrastructure of the greater metro area. The subject is fifteen road miles from downtown Portland via 99W to I-5.

THIS PAGE IS INTENTIONALLY LEFT BLANK

## DESCRIPTION

**AERIAL PHOTOGRAPH**



*Maps in this report are oriented to North at top unless indicated otherwise.  
Note that maps show approximate boundaries only and are not to be relied on for any other use.*

**SUBJECT PHOTOGRAPHS**



1: View of subject from abutting parcel looking in a northerly direction



2: Southern boundary looking in an easterly direction from near the southwest extreme



3: Interior site photograph



4: Interior site photograph

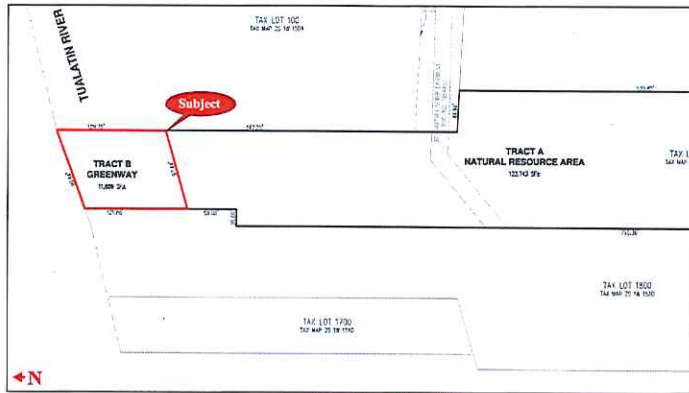


5: Tualatin River frontage



6: SW Hazelbrook Road looking in a westerly direction  
(10605 SW Hazelbrook Road at photo right)

### SURVEY



Greenway Tract B of Hazelbrook Estates  
(North at left)

### SITE ANALYSIS

**Identification and Site Size:** The subject property is located along the Tualatin River in Tualatin and commonly known as Greenway Tract B of the Hazelbrook Estates. The property is further identified as the northernmost 11,809 SF of Tax Lot 300 of Township 2S, Range 1W of Section 15DA and a portion of Assessor's Parcel Number R517569. The property contains 11,809 gross SF as reflected on the preceding survey map, which is assumed correct for the purposes of this analysis.

**Shape:** Rectangular. (See Plat)

**Abutting Properties:**

- North – Tualatin River
- East – Vacant small acreage residential parcel owned by the City
- South – Proposed Natural Resource Tract and 5-lot subdivision (Hazelbrook Estates)
- West – Improved small acreage homesite
- No detrimental adjacencies were noted. The Tualatin River frontage is seen as an amenity.

**Street Improvements:**

- None. Boat access only.

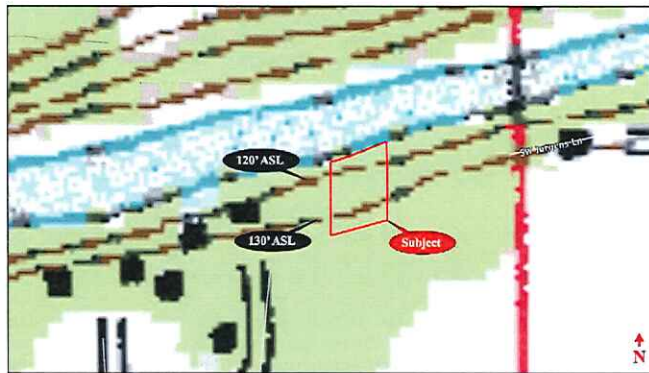
**Frontage & Exposure:** The subject represents the northernmost portion of the Hazelbrook Estates and does not have frontage along any roadway. Exposure is limited to boat traffic.

**Accessibility:** There is no provision to establish legal access to the parcel. Access is limited to boat access; there are no existing docks.

**Utilities:** None

**Environmental:** No environmental assessment information was provided. It is assumed that no significant environmental contamination exists on the subject property, however, the appraiser is not an expert on contamination and no warranty is made. If any questions or concerns exist, the appropriate experts should be consulted.





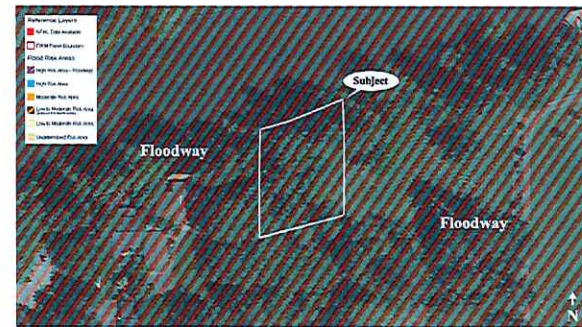
Topography Map

**Topography and Site Features:** The subject property is level to steeply sloping and ranges from ±110' - 130' above sea level.



Wetland Map

**Watercourses and Wetlands:** The subject has ±100' of Tualatin River frontage. Based upon information gleaned from the US Fish and Wildlife Services Online National Wetlands Inventory map above, the subject is not encumbered by any recognized wetlands. No other information about wetlands was made available; the mapping is general in nature and based primarily on aerial surveys.



Source: FEMA

Flood Map

**Flood Zone:** Based upon FEMA map 41067C 0543E dated November 4, 2016, the subject is entirely located within the flood way. Specifically, it is located within floodway areas in Zone AE. Zone AE denotes that base flood elevations are determined. In this case they are at an elevation of 127'. A floodway is defined as: *the channel of a stream plus any adjacent floodplain areas that must be kept free of encroachment so that the 1% annual chance flood can be carried without substantial increases in flood height.*

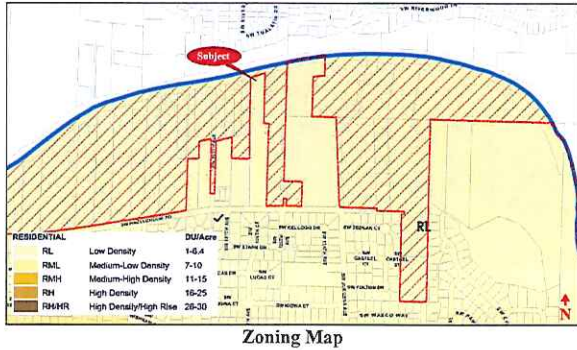


Source: USDA-NRCS

Soils Map

**Geology, Soils, and Drainage:** Soil identification and percentages in the preceding chart are approximate and serve as a general indicator only. Source of data is the online mapping of the USDA Natural Resources Conservation Service. The subject is primarily comprised of Class IIw soil in the form of Chehalis silty clay loam; the balance of the site is designated as water.

Class II (2) soils have moderate limitations that reduce the choice of plants or require moderate conservation practices. Subclass w is made up of soils for which excess water is the dominant hazard or limitation affecting their use. Poor soil drainage, wetness, a high-water table, and overflow are the factors that affect soils in this subclass.



Zoning Map

**Zoning:** The subject is zoned RL, Low-Density Residential, by the City of Tualatin. The purpose of this district is to provide low density residential areas in the City that are appropriate for dwellings on individual lots, as well as other miscellaneous land uses compatible with a low density residential environment. The maximum density is 6.4 units per net acre. Uses permitted outright include single-family dwellings, agricultural, greenways and natural areas and public parks. There are also several other uses as well as conditional uses that may be allowed. Development standards include 6,500 SF minimum lot area, 30' average lot width, and a maximum building coverage of 45%.

The subject is being created along with the Hazelbrook Estate subdivision and it is appraised as though a freestanding, legal lot of record.

A zoning change in the foreseeable future is highly unlikely.

**Easements & Encroachments:** No title report has been provided. It is assumed that there are no easements or encroachments that would be detrimental to the value of the subject. In all cases it is strongly recommended that a current title insurance policy be obtained to protect against the possibility of unknown easements or other deed restrictions that could affect value.

**Property History:** The subject property represents 11,809 SF of land within a larger 4.13-acre improved parcel. Traditionally, it represented the river frontage for the homesite. There is a proposal to develop the larger parcel with four additional homesites to be named Hazelbrook Estates. Along with development, the subject parcel is being created as a greenway. Metro is currently in negotiations to purchase the greenway (subject).

**Property Taxes:** The subject property is liable for annual real estate taxes as levied by the county assessor. Real property in the State of Oregon is assessed a statutory MAV (maximum assessed value) which is based upon a percentage of the assessor's determination of real market value (RMV). Because the subject parcel has not yet been established as a legal lot, there is no record of property assessment for it. However, it is reasonable to expect that its taxes would be similar to other parcels in this location with the same economic utility. In any case, due to the methods and purposes of government assessment, the Assessor's "real market value" would not be considered indicative of the subject's actual market value. For the purposes of this appraisal, delinquent taxes, local improvement district bonds, SDCs, TIFs, etc. (if any) are considered as liens on the property and are excluded from the analysis of market value.

**Building Improvements:** None.

**Site Improvements:** None.

**Larger Parcel:** Although the subject property is being partitioned from a larger, contiguous parent parcel, it has a distinct use as a riverfront recreational parcel within the greenway, and it is thus considered to be the larger parcel.

Subject information is based on County data, owner interview, and site observations.

### HIGHEST AND BEST USE

Highest and best use is defined as the reasonably probable use of property that results in the highest value. The four criteria that highest and best use must meet are legal permissibility, physical possibility, financial feasibility, and maximum productivity. (*The Dictionary of Real Estate Appraisal*, 6<sup>th</sup> Ed.)

Implied within this definition is that the determination of highest and best use involves the appraiser's judgment and analytical skills and is not a fact to be found. In appraisal practice, the concept of highest and best use represents the premise upon which a value is based. In a context of most probable selling price (market value) another appropriate term for highest and best use would be most probable use. To estimate the subject's highest and best use, the potential uses for the property are examined in the context of the restraints put on its use, which are governmental, social, economic and physical.

**Legal Considerations:** The most important legal consideration is the subject's zoning. The subject is under the jurisdiction of the City of Tualatin and zoned RL, Low-Density Residential. This is primarily a residential district that allows single-family residential up to a density of 6.4 units per acre as well as agricultural use, greenways, natural areas and public parks. There is no likelihood of a change in zoning. The subject is labeled as a floodway by FEMA. The parcel lies entirely within the flood plain and the floodway of the Tualatin River.

**Physical Characteristics:** The subject parcel is 11,809 SF in size, rectangular shaped and level to steeply sloping in terms of topography. Access is only available by boat and the entire property is located within a floodway. Historically, the subject parcel provided a treed river amenity to the residence that is on the parent parcel. In terms of a residential use, the subject's lack of road access, topography and location within a floodway effectively preclude development. The subject's small size and topography precludes efficient agricultural use.

With regard to its use as a recreational tract, the subject exhibits desirable characteristics, including Tualatin River frontage and views, wooded areas as well as proximity to the Portland Metro. These features could make it attractive for day camping, swimming, kayaking and fishing. Based on its legal and physical characteristics, the most likely use for the subject is for recreation use.

**Market Overview, Feasibility, Maximum Productivity:** Supply and demand characteristics are considered, including the supply of and demand for smaller, access challenged recreational use. The most likely purchaser would be a recreational user. The subject is close enough to Portland that it could attract buyers from the metro area. The market for marginal recreational property is effectively a separate market with relatively few transactions, and not subject to extreme volatility. Prices for such lands have been fairly stable over a long period of years. The subject is considered to be a marketable parcel, if offered at a reasonable price that reflects its economic utility, which is limited by its access and topography.

**Highest & Best Use Conclusion:** Given the subject's combination of legal limitations, physical characteristics and market factors, the highest and best use of the subject as vacant is for recreational use. (The subject is unimproved, and thus the question of HBU as improved is moot).

THIS PAGE IS INTENTIONALLY LEFT BLANK

THIS PAGE IS INTENTIONALLY LEFT BLANK

## VALUATION

### THE APPRAISAL PROCESS

There are three basic approaches used by appraisers to develop an opinion of market value. These approaches provide market data from differing perspectives. The three approaches are the Cost, Sales Comparison and Income Approaches.

As noted in the Scope of Work, a direct Sales Comparison Approach is used to form an opinion of the value of the subject property.

The subject consists of vacant marginal recreation land, and thus a cost approach is not applicable. Properties such as the subject are typically not purchased for their rental income or potential rental income, which does not justify the prices paid for the land. Thus, the income approach is not considered applicable.

### SALES COMPARISON APPROACH

The value of the subject site is estimated by the direct Sales Comparison Approach. The Sales Comparison Approach is based upon the principle that a prudent buyer would pay no more for a property than the cost of acquiring a satisfactory substitute. In this case, the *whole property price* is considered the most applicable.

Extensive research was conducted in the subject's market area for recent sales of similar properties. As a result of the unique nature of the subject, specifically its unusual combination of boat access and physical attributes, the sales comparables exhibit a range of locational, physical and legal characteristics. It was necessary to expand the scope of the search in terms of size and sale dates and to include competing markets within and beyond Washington County. Ultimately, a sufficient number of relevant sales were identified, confirmed, and analyzed. These sales are presented on the following pages, which include a location map, a summary chart, a market data analysis, and a conclusion of value for the subject property.

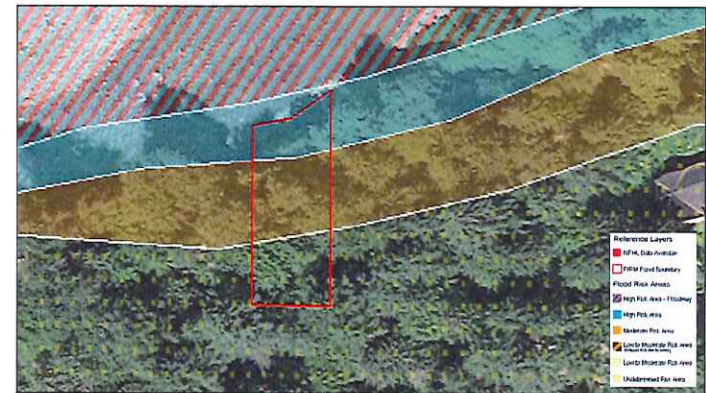
THIS PAGE IS INTENTIONALLY LEFT BLANK

COMPARABLE LAND SALES DATA

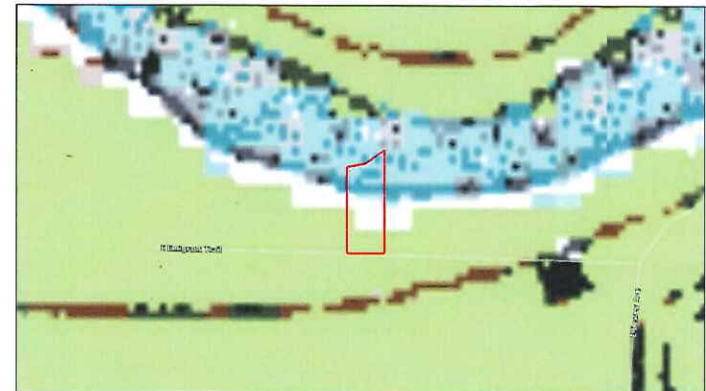


Comparable 1 – E Emigrant Trail, Welches

Listing Photo



FEMA Flood Hazard Map

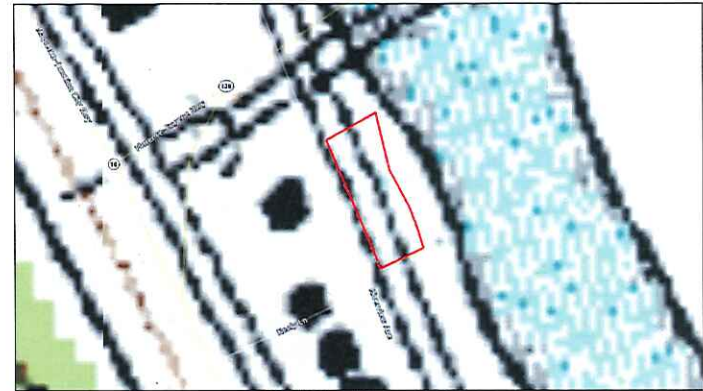


Topography Map



Listing Photo

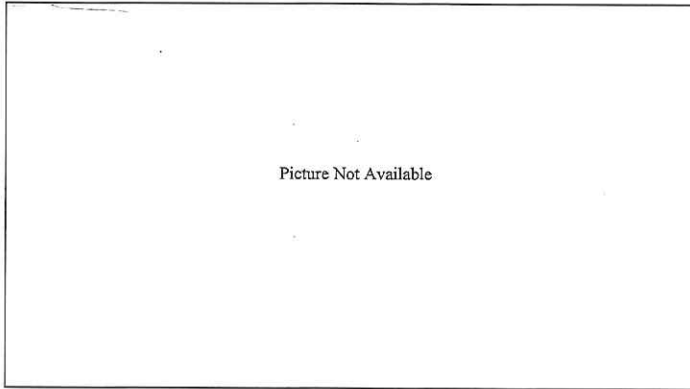
Comparable 2 – Riverview Avenue, Mapleton



FEMA Flood Hazard Map



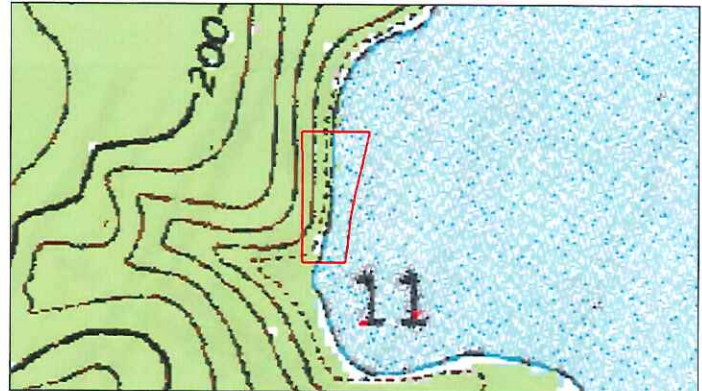
Topography Map



Comparable 3 – Front Street, Charleston



FEMA Flood Hazard Map



Topography Map

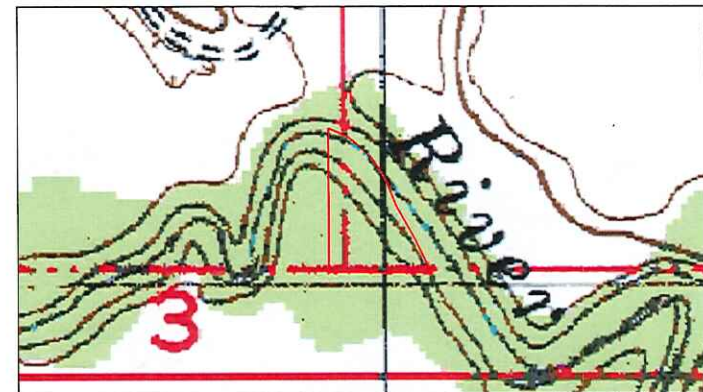




Comparable 4 – E of Golf Course Road, Cornelius



FEMA Flood Hazard Map



Topography Map

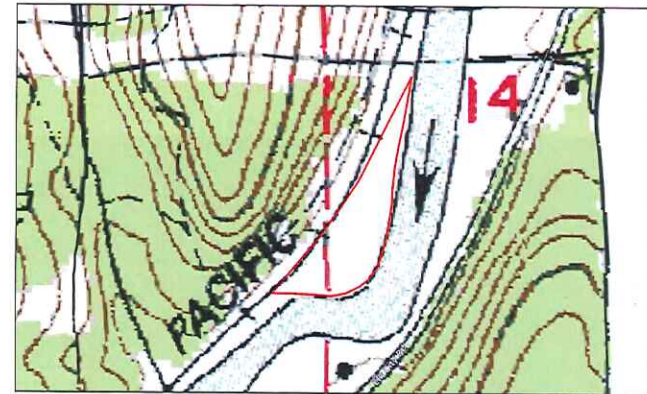


Listing Photo

Comparable 5 – N of Elk City Road, Toledo

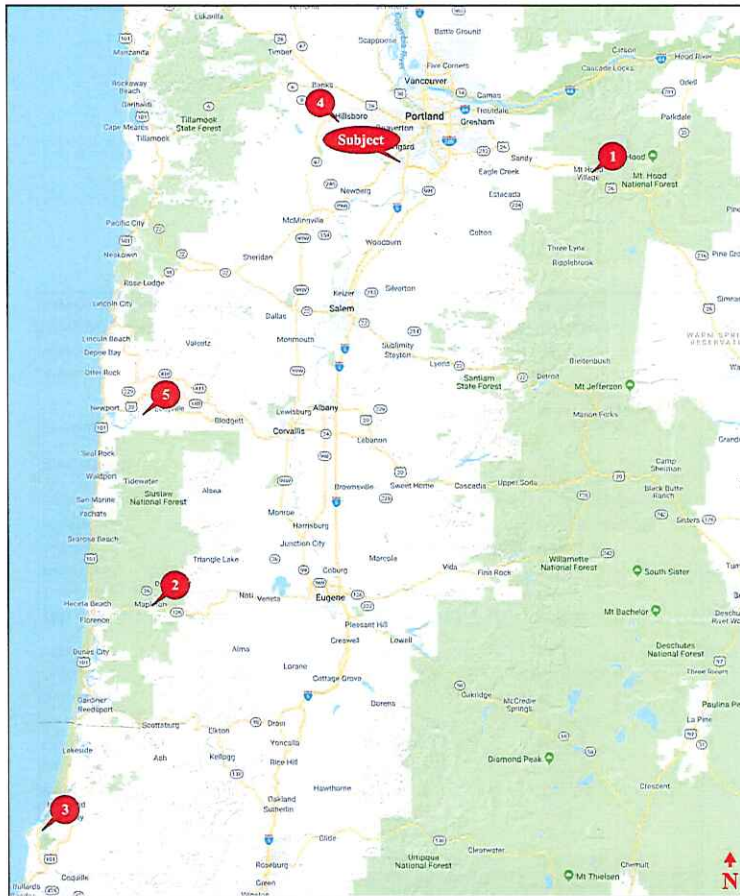


FEMA Flood Hazard Map



Topography Map

COMPARABLE LAND SALES MAP



SUMMARY OF COMPARABLE SALES

Subject	Comparable 1	Comparable 2	
<b>Location</b>	N. of SW Hazelbrook Rd.	E Emigrant Trail	Riverview Ave.
<b>Area</b>	Tualatin	Welches	Mapleton
<b>County</b>	Washington	Clackamas	Lane
<b>Property ID</b>	Por. 2S115DA 300	00735510	764124
<b>Sale Date</b>	–	1.2016	6.2016
<b>Cash Eq. Sale Price</b>	–	\$5,000	\$5,000
<b>Parcel Size</b>	11,809 SF	5,250 SF	6,098 SF
<b>Overall \$/SF</b>	–	\$0.95	\$0.82
<b>Zoning</b>	RL; City of Tualatin	RR, County	RR1, County
<b>Utilities</b>	None	None	None
<b>Shape</b>	Rectangular	Rectangular	Rectangular
<b>Topography</b>	Level - Steeply Sloping	Level/Low-Lying	Sloping
<b>Flood Zone</b>	100%	68%	100%
<b>Wetlands</b>	None of Note	None of Note	None of Note
<b>Road Access</b>	None - Boat Access	Gravel Road	Paved Public ROW
<b>Views/Amenities</b>	Tualatin River frontage & views, trees	Sandy River frontage & views, trees	Siuslaw River frontage & views
<b>Improvements</b>	None	None	None
<b>Comments</b>	Boat access only. Small recreational parcel with Tualatin River frontage	Small recreational parcel with Sandy River frontage	Extremely small parcel - very limited uses
<b>Grantor</b>	–	Olson	Taylor
<b>Grantee</b>	–	Rice	Ramm
<b>Likely Uses   HBU</b>	Recreation	Recreation	Recreation
<b>Buyer's Motivation</b>	–	Recreation	Recreation

**SUMMARY OF COMPARABLE SALES**

	Comparable 3	Comparable 4	Comparable 5
Location	Front St.	E of Golf Course Rd.	N of Elk City Rd.
Area	Charleston	Cornelius	Toledo
County	Coos	Washington	Lincoln
Property ID	1731800	R0405966	R346249
Sale Date	10.2017	9.2016	11.2016
Cash Eq. Sale Price	\$9,000	\$12,000	\$13,500
Parcel Size	75,359 SF	105,415 SF	87,120 SF
Overall \$/SF	\$0.12	\$0.11	\$0.15
Zoning	F, CBEMP, County	EFU, County	AC, County
Utilities	None	None	None
Shape	Irregular	Irregular	Irregular
Topography	Steeply Sloping	Level - Sloping	Level
Flood Zone	50%	100%	100%
Wetlands	50%	Min. - Along River frontage	Minimal
Road Access	None - Boat Access	None - Boat Access	None - Boat Access
Views/Amenities	South Slough frontage & views, trees	Tualatin River frontage & views, trees	Yaquina River frontage & views, trees
Improvements	None	None	None
Comments	Boat access only, rec. parcel with slough frontage; +/- 50% water	Recreational parcel with Tualatin River frontage	Boat access only, Recreational parcel with Yaquina River frontage
Grantor	Mink	Livingston /Smith	Lars
Grantee	Moody	Columbia Land Trust	Gill
Likely Uses   HBU	Recreation	Recreation	Recreation
Buyer's Motivation	Recreation, Speculation	Assemblage	Recreation

**MARKET DATA ADJUSTMENT FACTORS**

**Overview:** The subject and comparable sales represent marginal recreational use properties because of their combination of zoning, access, size and physical attributes. Thus, the sales are subject to similar market influences and a similar regulatory environment. The sales are drawn from Washington County and competing areas throughout Oregon. They were selected for their locations, marginal utility and physical similarities to the subject property, including such aspects as water features, access and recreational potential. In terms of a likely economic use, the comparables offer a similar attraction for buyers in the market for parcels that can offer limited recreational use. Thus, in all respects, an effort has been made to find properties that represent reasonable substitutes for the subject property.

**Unadjusted Range of Value:** On an unadjusted basis, the comparable sales range from \$5,000 to \$13,500, overall.

**Elements and Methods of Comparison:** In this comparison, there are a number of adjustment factors. Quantitative adjustments to each comparable would typically be considered for the contributory value of improvements and permanent plantings. In this case, however, the subject and comparables are essentially raw, undeveloped land where the trees are seen as an amenity. Analysis will focus on the bracketing method, as explained in the following paragraph. Building on the bracketing analysis, a ranking analysis is also considered. The ranking analysis is summarized in a table that shows each sale and whether it is inferior, superior, or similar to the subject on an overall basis. This narrows the likely range of value and provides a visual summary of the elements that lead to the conclusion of value.

**Quantitative vs. Qualitative Adjustments:** Due to the disparity of the available market data, it is not feasible to make specific, supportable, quantitative adjustments for each difference between a comparable and the subject with reliability or precision in this case. Therefore, a qualitative method of comparison is employed to make adjustments, whereby each sale is analyzed relative to its superior or inferior characteristics relative to the subject, thus indicating whether it should bracket the lower or upper range of value for the subject property.

**Verification of Sales Data:** Direct verification was made with the brokers or buyers for all of the comparables.

**Property Rights Conveyed:** Fee simple in all cases.

**Financing Terms:** Confirmations include inquiries as to seller concessions and seller financing. If any were found, they would be adjusted for to result in a cash-equivalent sale price. All sales except Sale 2 were cash to the seller and no significant seller financing or concessions were noted; it is assumed that there were none. Sale 2 was aided by seller financing. The listing/selling broker was also the seller who relies on the income from sold properties. She reported the contract was a preference and did not affect the sale price.

**Conditions of Sale:** All of the comparable sales appear to be and are assumed to be arm's length market transactions. The transactions appear to have been between unrelated parties. To the best of my knowledge, none of the sales involved a foreclosed property or a short sale. No such sales were found, and they are not predominant in this market. There were no forced sales, such as sales made under threat of condemnation or other legal process. Thus, all comparables are arm's length transactions that were sold without any known duress.

**Buyer's Motivation:** Typical purchasers in this market in this price category are interested in holding a property for their own use. However, the various and mixed buyer motivations are not considered to exert any undue influence on the price of the comparable sales, as all must compete for the same pool of buyers; thus, no adjustment is made for this factor.

**Market Conditions (Time/Date of Sale):** Sales of tracts of land with marginal recreational uses such as the subject (camping, fishing, picnicking, clamming) occur relatively infrequently. The comparable sales closed from January 2016 to October 2017 and can be considered recent for this property type. All sales occurred well after the real estate correction of 2008. Although the housing market has been in recovery mode since early 2012, market prices for properties of this type have remained fairly stable. Transactions depend to a great extent upon cash buyers. The land often lacks a productive use other than recreation, and prior unrealistic expectations about the market are no longer in play. For these reasons, prices for raw marginal recreational land throughout Oregon have been relatively stable over the past several years. This was attested to by the brokers interviewed. Thus, no upward adjustments are indicated for market conditions.

**Location:** All sales are located within the subject's immediate or competing markets throughout Oregon. Since there are relatively few sales, there is no credible market data with which to establish a specific quantified locational adjustment. Thus, adjustment for location will be considered qualitatively.

**Access:** Access to the subject and comparables except Sales 1 and 2 is via boat only. Comparable 1 is accessed via a long gravel surfaced private and primitive road that is marginally superior to the subject requiring a small downward adjustment. Comparable 2, is accessed via a paved public road which is superior to the subject. The remaining sales have similar access.

**Physical Characteristics:** Comparable sales have been selected for their physical similarities to the subject property, including such aspects as water features, flood plains, and topography. However, differences are recognized, and adjustments are made accordingly.

With respect to parcel size, the subject's area of 11,809 SF is bracketed by the comparables, which range from 5,250 to 105,415 SF. There is a loose relationship between size and sales price as the smallest parcels sold for the least and the largest for the most. However, this is not a strong direct relationship noting that Comparable 4 is larger than 5 yet sold for less. Numerous adjustment factors are at play, and size is only one factor. Because there are relatively few sales, there is no credible market data with which to establish a specific quantified locational adjustment. Thus, the adjustment for parcel size is considered qualitatively.

**Timber:** The subject and all comparables have a timber/tree component. However, because of their proximity to a water body and associated setbacks as well as their recreational highest and best use, timber is seen as an amenity rather than as a commodity with a distinct value.

**Economic Characteristics and Uses:** In terms of a likely economic use, the subject and comparables offer a similar attraction for buyers in the market for parcels that can offer a marginal recreation use such as day camping, fishing and in one instance clamming.

**Zoning:** The subject and all comparables exhibit a wide range in underlying zoning. However, as a result of their combination of access, size, topography and zoning, highest and best use is limited to marginal recreational use. Thus, no adjustments are required.

**Non-realty Components:** No significant personal property or other non-realty components were found among the sales, and thus no adjustment is indicated.

ANALYSIS OF COMPARABLE LAND SALES

**Comparable 1** is the January 2016 sale of a riverfront recreational parcel for \$5,000. The parcel is located roughly 16 road miles east of Sandy. Access is via ±300' private and primitive gravel surfaced road. The underlying parcel is 5,250 SF in size, roughly rectangular, level and low-lying in topography. Power is available with a roughly 200' extension. Parcel amenities include Sandy River frontage, river views and tree cover. As a result of its river frontage, ±68% of the parcel is located within a flood hazard zone.

The listing/selling broker reports the property was purchased for recreation which likely included fishing and day camping and that the transaction was market in all respects.

Compared with the subject, upward adjustments are required for its inferior location and smaller size. Conversely, a significant smaller downward adjustment is required for the sale's superior access. Overall, the sale is considered significantly inferior to the subject, bracketing the lower range of value at \$5,000.

**Comparable 2** represents the June 2016 sale of a riverfront recreational parcel for \$5,000. The parcel is located roughly 15 road miles east of Florence in the town of Mapleton. Access is via Riverview Avenue, a paved public right-of-way. The parcel is 6,098 SF in size, rectangular in shape, sloping in terms of topography and has power available. Parcel amenities include Siuslaw River frontage, river views and tree cover. As a result of its river frontage, 100% of the parcel is located within a flood hazard zone.

The listing/selling broker/seller reports the property was purchased by a property owner located across Riverview Avenue to the west for recreational use which likely included fishing. The broker also reported that the owner contract was her preference, at market and did not affect the sale price. The transaction was reported as market in all respects.

Compared with the subject, upward adjustments are required or its inferior location and smaller size. Smaller downward adjustments are made for the sale's superior access along a public street and its longer river frontage. Overall, the sale is considered significantly inferior to the subject, bracketing the lower range of value at \$5,000.

**Comparable 3** is the October 2017 sale of a slough front recreational parcel for \$9,000. The parcel is located southwest of Coos Bay and accessed via boat only. The underlying parcel is 75,359 SF in size, irregular in shape and level to steeply sloping in topography with ±50% of the parcel in the water. There are no utilities available to the property. Parcel amenities include ±500' of South Slough frontage, slough views and tree cover. As a result of its water frontage, ±50% of the parcel is located within a flood hazard zone.

The listing/selling broker reports that the property was purchased for speculation and recreation. The property is surrounded by a single ownership and the buyer anticipated that the adjoining property owner would want to control the entire area. Recreational uses likely included fishing and clamming. The broker reported that transaction as market in all respects.

Compared with the subject, upward adjustments are required for the sale's inferior location, topography and proportion of submerged land. Smaller downward adjustments are made for the sale's larger overall size and its longer river frontage. Overall, the sale is considered slightly inferior to the subject, bracketing the marginal lower range of value at \$9,000.

**Comparable 4** represents the September 2016 sale of a riverfront recreational parcel for \$12,000. The parcel is located southeast of Cornelius and access is via boat only. The parcel is 105,415 SF in size, irregular in shape and level to sloping in topography. There are no utilities available to the property. Parcel amenities include more than 600' of Tualatin River frontage, river views and tree cover. As a result of its river frontage, the entire parcel is located within a floodway.

The buyer's representative reports that the property was purchased for assemblage and that the transaction was market in all respects.

Compared with the subject, a downward adjustments is necessary due to the sale's significantly larger size. The comparable is over seven times larger than the subject's site area, and it has nearly six times the length of river frontage. Due to these characteristics, the sale is superior to the subject, bracketing the upper range of value at \$12,000.

**Comparable 5** represents the November 2016 sale of a riverfront recreational parcel for \$13,500. The parcel is located east of Toledo, Oregon in Lincoln County and access is via boat only. The underlying parcel is 87,120 SF in size, irregular in shape and level in topography. There are no utilities available to the property. Parcel amenities include more than 1,100' of Yaquina River frontage, river views and tree cover. As a result of its river frontage, the entire parcel is located within a flood hazard zone.

The listing broker reports the property was purchased by a fisherman for recreation which likely included fishing and camping, and that the transaction was market in all respects.

Compared with the subject, an upward adjustment for location is more than offset by significant downward adjustments for the property's significantly larger size, long river frontage, and topography. Thus, the sale is considered significantly superior to the subject, bracketing the extreme upper range of value at \$13,500.

**Ranking of the Subject Relative to the Comparable Sales:** Based on the preceding analysis of the comparable sales, with reference to the overall comparison between each sale and the subject, the following grid can be constructed. This shows the relative ranking of each comparable sale with respect to the subject, and the reasons for positive and negative adjustments to each sale.

**SUMMARY ADJUSTMENT GRID - OVERALL RANKING**

Whole property analysis<sup>1</sup>

Comparable	Sale Date	Parcel Size	Cash Equivalent Sale Price	Adjustments + Upward	Adjustments - Downward	Conclusion
1 E Emigrant Trail	1.2016	5,260 SF	\$5,000	+ Location + Size	- Access	Significantly Inferior
2 Riverview Ave.	6.2016	6,098 SF	\$5,000	++ Location + Size	- Access - River frontage	Significantly Inferior
3 Front St.	10.2017	75,359 SF	\$8,000	+ Location + Topography + % Usable	- Size - River frontage	Marginally Inferior
<b>Subject Property</b>						
4 E of Golf Course Rd.	9.2016	105,415 SF	\$12,000	+ (None)	- Size - River frontage	Superior
5 N of Elk City Rd.	11.2016	87,120 SF	\$13,500	+ Location	- Size - Topography - River frontage	Significantly Superior

<sup>1</sup> Qualitative adjustment to subject

**CONCLUSION OF VALUE**

In the preceding analysis, Comparables 1 through 3, at \$5,000 to \$9,000, represent inferior parcels that bracket the lower range of value for the subject. Comparables 4 and 5, at sale prices of \$12,000 and \$13,500, are superior properties that bracket the upper range of value. Thus, the subject is bracketed within a likely range of \$9,000 to \$12,000. Somewhat greater weight is placed on the two sales in the Portland Metro area (Comparables 1 and 4), and in particular Comparable 4, which is also along the Tualatin River.

Based on the subject's relative locational and physical attributes as presented and analyzed herein, and those of the comparable sales, a value slightly below the midpoint of the aforementioned range, or \$10,000 is reasonable and supportable.

Therefore, considering the subject's legal and physical and locational characteristics, and the supply of and demand for this type of property, the market value of the subject property, in fee simple, subject to all known easements and encumbrances, as of February 16, 2018, is estimated as follows:

TEN THOUSAND DOLLARS

**\$10,000**

**Note** -- As of the effective date of appraisal the subject is part of a larger development parcel and has not yet been created. Thus, this appraisal is subject to the hypothetical condition that the subject is a freestanding legal lot. It is assumed that there are no environmental conditions or contamination that would affect the marketability or value of the subject property. If these premises are shown to be otherwise, the value conclusion could be different.

### CERTIFICATION

The undersigned does hereby certify that, to the best of my knowledge and belief:

1. The statements of fact contained in this report are true and correct.
2. The reported analyses, opinions, and conclusions are limited only by the reported assumptions and limiting conditions and are my own personal, impartial, and unbiased professional analysis, opinions and conclusions.
3. I have no present or prospective interest in the property that is the subject of this report, and I have no personal interest with respect to the parties involved. I have no bias with respect to the property that is the subject of this report or to the parties involved with this assignment.
4. My engagement in this assignment was not contingent upon developing or reporting predetermined results.
5. My compensation for this assignment is in no manner contingent upon returning a specified value, requested minimum value, approval of a loan, or conclusion. Additionally, my compensation for completing this assignment is not contingent upon the development or reporting of a predetermined value or direction in value that favors the cause of the client, the amount of the value opinion, the attainment of a stipulated result, or the occurrence of a subsequent event directly related to the intended use of this appraisal.
6. The reported analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the requirements of the Code of Professional Ethics & Standards of Professional Practice of the Appraisal Institute, and the Uniform Standards of Professional Appraisal Practice (USPAP).
7. The use of this report is subject to the requirements of the Appraisal Institute relating to review by its duly authorized representatives.
8. Significant professional assistance was provided by Steven M. Beaman, CCIM (Oregon Certified General Appraiser #C000737). Mr. Beaman assisted on all aspects of the appraisal from subject identification to value conclusion.
9. I have viewed the subject and Comparable 4. Mr. Beaman has viewed the subject. The balance of the comparables were viewed from aerial photography because of access and/or distance limitations.
10. The Appraisal Institute conducts a program of continuing education for its designated members. As of the date of this report, I, Matthew Larrabee, MAI, have completed the continuing education program of the Appraisal Institute.
11. I have performed no services, as an appraiser or in any other capacity, regarding the property that is the subject of this report within the three-year period immediately preceding acceptance of this assignment.



Matthew Larrabee, MAI  
Certified General Appraiser  
Oregon State Certification #C000543

### ORDINARY ASSUMPTIONS AND LIMITING CONDITIONS

The legal description furnished me is assumed to be correct. I assume no responsibility for matters legal in character, nor do I render any opinion as to title, which is assumed to be marketable. All existing liens, encumbrances, and assessments have been disregarded, and the property is appraised as though free and clear, under responsible ownership and competent management.

The exhibits in this report are included to assist the reader in visualizing the property. Aerial and Street view photos are courtesy of Alphabet Inc. I have made no survey of the property and assume no responsibility in connection with such matters.

Unless otherwise noted herein, it is assumed that there are no encroachments, zoning, or restrictive violations existing in the subject property, and that there are no artifacts or historical resources that would be detrimental to the value of the property. Information, estimates, and opinions contained in this report are obtained from sources considered reliable; however, no liability for them can be assumed by the appraiser.

This report shall be used for its intended purpose only and by the parties to whom it is addressed. Possession of this report does not include the right of publication, nor does it make one an intended user. Appraiser's liability is limited to the amount of appraisal fees actually paid, and liability extends only to the client named in this report. The contract to provide the work was entered into within the jurisdiction of Washington County, Oregon.

This document is an instrument of service and all intellectual property rights are retained by the author. Use of portions of the report out of context, or the resale of data, or placement of market data from this report into an electronic database is prohibited. Neither all nor any part of the contents of this report shall be conveyed to the public through advertising, public relations, news, sales, or other media without the written consent or approval of the author. This applies particularly to value conclusions or to the identity of the appraiser or firm with which he is connected. The appraiser may not be required to give testimony or to appear in court by reason of this appraisal, with reference to the property in question, unless a prior fee agreement has been made.

Unless otherwise stated in this report, the existence of hazardous material, which may or may not be present on the property, was not observed by the appraiser. The appraiser has no knowledge of the existence of such materials on or in the property. The appraiser, however, is not qualified to detect such substances. The presence of potentially hazardous materials may affect the value of the property. The value estimate is predicated on the assumption that there is not such material on the property that would cause a loss in value. The appraiser assumes that there are no hidden or unapparent conditions of the property, subsoil, or structures, which would render it more or less valuable. No responsibility is assumed for any such conditions, or for any expertise or engineering knowledge required to discover them. The client is urged to retain an expert in this field, if desired. The appraiser assumes no responsibility for determining if the property requires environmental approval by the appropriate governing agencies nor if it is in violation thereof.

Real estate markets can and do change, sometimes rapidly or unexpectedly. The statements of value and all conclusions shall apply as of the dates shown herein. All opinions of market value are presented as my considered opinion based on the facts and data appearing in the report. As an appraiser, I assume no responsibility for changes in market conditions or for the inability of the owner to locate a purchaser at the appraised value.

All other assumptions or conditions stated elsewhere in the body of the report are also made a part of these Assumptions and Limiting Conditions stated herein.



THIS PAGE IS INTENTIONALLY LEFT BLANK

## **ADDENDA**

**QUALIFICATIONS OF THE APPRAISER**

QUALIFICATIONS STATEMENT

MATTHEW LARRABEE, M.ARCH., MAI

MATTHEW LARRABEE, M.ARCH., MAI  
Principal Appraiser – Real Estate Services Group, Inc.  
10961 NW Crystal Creek, Portland, Oregon 97229



LarrabeeMAI.com | 503.799.3374 | matthew@resg.us | Larrabee.MAI@gmail.com

PROFESSIONAL DESIGNATION & LEADERSHIP

Member of the Appraisal Institute, MAI  
President, Greater Oregon Chapter of the Appraisal Institute, 2009  
Washington County Planning Commission, 2009-2012  
Adjunct Professor, Portland State University, Center for Real Estate  
Adjunct Professor, Univ. of Portland, Pamplin School of Business

EDUCATION

Undergraduate Degree: Bachelor of Arts, 1976 (Psychology)  
University: University of California - Berkeley, California  
Graduate Degree: Master of Architecture (M.Arch.), 1982 (Architecture)  
University: University of California - Los Angeles, California

Real Estate Appraisal Courses

Appraisal Institute 705GRE  
Appraisal Institute  
American Society of Farm Mgr./Rural Appr's.  
American Society of Farm Mgr./Rural Appr's.  
Appraisal Institute Course 720  
Appraisal Institute Course 710  
Appraisal Institute Course 540  
Appraisal Institute Course 550  
Appraisal Institute Course 520  
Appraisal Institute Course 530  
Appraisal Institute Course 510  
Appraisal Institute Course  
Appraisal Institute Course 210  
Additional Coursework:  
Finance; Real Estate Appraisal Foundations; Real Estate Law – 1992-1995

Litigation Appraising: Specialized Topics & Applications – 2011  
The Valuation of Conservation Easements – 2009  
Fundamentals of Appraisal Review – 2006  
Yellow Book: Uniform Appr'l. Stds. for Federal Land Acquisitions - 2005  
Condemnation Appraisal (Applications) – 1999  
Condemnation Appraisal (Principles) – 1999  
Report Writing and Valuation Analysis – 1999  
Advanced Applications – 1998  
Highest & Best Use and Market Analysis – 1998  
Advanced Sales Comparison and Cost Approaches – 1997  
Advanced Income Capitalization – 1995 & 2011  
Standards of Professional Practice – 1995 & 2000  
Applied Residential Property Valuation – 1991  
Income Property Case Study & Narrative Report Writing; Real Estate

Continuing Education

Appraisal Institute  
Appraisal Institute  
Oregon Society of Farm Mgr./Rural Appr's.  
Oregon Society of Farm Mgr./Rural Appr's.  
Oregon Society of Farm Mgr./Rural Appr's.  
Oregon Society of Farm Mgr./Rural Appr's.  
Appraisal Institute & IRWA  
International Right of Way Assoc'n.  
Appraisal Institute  
Appraisal Institute  
The Seminar Group  
Appraisal Institute  
Appraisal Institute  
Appraisal Institute  
Oregon Society of Farm Mgr./Rural Appr's.

UASFLA: Practical Applications (Instructor) - 2017  
Advanced Land Valuation: Instructor training - 2017  
Tweeners (Small Farms/Rural Residential) - 2017  
Permanent Planting Trends & Values - 2016  
Cropland Soils, Drainage, Water Rights - 2016  
Pacific Northwest Forestry Valuation - 2015  
Right of Way Appraisals (Panelist) - 2015  
Problems in Valuation of Partial Acquisitions - 2014  
Vineyard & Winery Valuation - 2014  
Qualitative Analysis - 2014  
Eminent Domain - 2013 & 2003; Oregon Land Use Law - 2013  
Valuation of Conservation Easements and Taxes - 2013  
Willamette Valley Agricultural Financing and Current Market - 2011  
Common Errors & Misconceptions - Yellow Book - 2011  
Ag Finance, Markets, Technology and Land Ownership - 2009

Additional Continuing Education (Appraisal Institute): USPAP; Business Practices & Ethics; Timberland Valuation-2016; ODOT Appraisal & Review Process - 2013; IRS Valuation Summit-2011; Case Studies in Partnership & Common Tenancy Valuation-2009; Valuing Green Buildings-2008; Real Estate Finance, Statistics, and Valuation Modeling-2008; Appraising Convenience Stores-2006; Litigation Appraising: Specialized Topics-2006, '11; Valuation of Detrimental Conditions in Real Estate- 2006; Analyzing Distressed Real Estate-2005; Subdivision Analysis-2005; Measure 37-2005; Small Hotel/Motel Valuation-2005; Land Valuation-2004; Evaluating Commercial Construction-2004; Attacking & Defending Appraisals in Litigation-2001; Corridor Valuation-2002; Construction Costs-1996. Appraisal Foundation & others: USPAP Instructor's Course-2002,'05, '07; Marylhurst U.: Uncertainties of Measure 37-2005; Ore. Law Institute: M37 Summit-2005; Recent Issues Affecting Land Use Development; Non-urban Properties; ASFMRA: Timber & Timberland Evaluation-2005; Appraising Unique, Complex & Mixed Use Agricultural Properties-2004; IRWA: Federal Yellow Book Updates-2001

QUALIFICATIONS STATEMENT

MATTHEW LARRABEE, M.ARCH., MAI

LICENSING, PROFESSIONAL AFFILIATIONS, and AWARDS

- Member of the Appraisal Institute, MAI (Designation awarded 2004)
- Member, Oregon Society of Farm Managers & Rural Appraisers (2004-present)
- Oregon State Certified General Appraiser (Certificate C000543; First certified 1996, expires 3/31/2018)
- Washington State Certified General Appraiser (Certificate 1101827, expires 3/2/2019)
- AQB national USPAP Instructor, certified by the Appraisal Foundation (Certif. 10135; 2002-3/2010)
- California Registered Architect (Certificate No. C20644; First licensed 1989, expires 3/31/2019)
- Appraisal Institute, Greater Oregon Chapter: Secretary (2006); Treasurer (2007); VP (2008); President (2009)
- Education Committee Chairman, Greater Oregon Chapter of the Appraisal Institute (2006-2008; 2010-2014)
- Appraisal Institute, Leadership Development & Advisory Council (LDAC), Washington DC (2005)
- Appraisal Institute, Greater Oregon Chapter, President's Service Award, 2004
- Appraisal Institute, Greater Oregon Chapter, Outstanding Service & Leadership Award, 2011

REAL ESTATE APPRAISAL & CONSULTING EXPERIENCE

2004-present: Principal Appraiser and President, **Real Estate Services Group, Inc.** – Providing real estate appraisal, consultation, expert witness testimony, and instructional services for private and public sector clients in the Pacific Northwest. Valuation assignments include: Portland CBD land; 360 acre oceanfront tract in Tillamook County; 681 acre Clackamas Riverfront tract with golf course, timber, and farm; Numerous "Yellow Book" appraisals of Wetland, Woodland, Riparian, Bayfront, and Floodplain tracts; 131 acre Klickitat County ranch with income-producing wind turbines (YB/Before/After); Conservation Easements on farms and woodlands: 17,000+ acre ranch in Morrow & Umatilla Counties (YB/CE/Before/After); 134.77 acre farm in Lane Co., Ore. (YB/CE/Before/After); 187 acres in Oysterville, Wash. (YB/CE/Before/After); 14 Flowage Easements, Grant County, Wash. (YB/CE/Before/After); 10 acre suburban prime development land (IRS/CE/Before/After). Federal Land Exchanges, Franklin and Grant Counties, Wash.; 205 acre Willamette Riverfront tract with 78 acres of Filberts, three dwellings, horse arena, vineyard; 341 acre Willamette Riverfront tract with 73 acres of Filberts, woodlands, dwellings, and vineyard-capable land; 277 acre woodland with vineyard capability, Dundee Hills AVA; 54 acre organic blueberry farm, Jefferson; 103 acre Punch Bowl Tract, Hood River; Retreat Centers; 145 acres sold by River View Cemetery to Portland Parks; TriMet South Waterfront transit station site on Zidell and OHSU tracts; 797 acre Columbia Riverfront ranch with 6,774 SF residence and 5 furlong racetrack; Historical buildings at Fort Vancouver and SE Portland; Trail Easements; 112 acre Poplar research facility, Westport; 47 acre parcel at PDX for conversion from golf to industrial development; 405 acre grass seed farm, Washington County; 89 acres for tribal fishing rights along Columbia River; 552,000 SF US Post Office, Pearl District; 71,000 SF manufacturing facility, Lake Oswego; Portland CBD parking garage with national chain retail tenants; Telecom tower, Cape Blanco, Appraisal Review: Multiparcel Land Exchange (Oregon Parks/Bandon Dunes GC); 88 acre marine industrial site, Warrenton; Local parkland acquisitions (THPRD); ROW review (City of Wilsonville).

1994-2004: Senior Staff Appraiser/Staff Appraiser/Research Assistant - **Moscato, Ofner & Henningsen, Inc.**, Portland, Oregon (Louis J. Moscato, MAI, Lawrence E. Ofner, MAI, and Scott Henningsen, MAI, Principals) – Primary duties were the appraisal of existing and proposed retail, office, industrial, and multifamily real estate, subdivisions, and vacant land; coordination of engineering and legal consultants; development pre-application conferences.

1993-1994: Staff Appraiser - **Cotton & Associates**, Danville, California – Primary duties were to appraise one-to-four family residential properties as a state licensed appraiser in the San Francisco Bay Area. (Charles Cotton, Certif. Gen. Appraiser, Principal); 1982-1992: Various employers - Practice of architecture in California

TYPES OF APPRAISAL ASSIGNMENTS

Farms and Woodlands	Riparian, Estuary, and Oceanfront Tracts
Valuation of Estates and Trusts	Subdivisions and Residential Land
Commercial and Industrial Land	Industrial - Warehouses, Manufacturing
Transitional Lands	Shopping Centers and Urban Retail
Conservation Land (Yellow Book)	Office Buildings
Apartments & Condominiums	Churches and Schools
Residential Single-Family	Constrained Sites
Contaminated Properties	Conservation Easements
Construction Defects	Right of way
Expert Witness Testimony	Forensic Appraisal Review

QUALIFICATIONS STATEMENT

MATTHEW LARRABEE, M.ARCH., MAI

TEACHING & CURRICULUM DEVELOPMENT

Appraisal Institute, Instructor, Fall 2004-present. Courses taught include Income Capitalization, Advanced Income Capitalization, General Market Analysis & Highest & Best Use, General Site Valuation & Cost Approach, USPAP, UASFLA, HP12C Calculator, Basic Appraisal Principles, Basic Appraisal Procedures, Litigation Assignments for Residential Appraisers, Residential Market Conditions. Regular instructor for the Greater Oregon Chapter; taught GMA/HBU for AI in Tianjin, China, August 2011. I served on the review committee and I am under contract to teach the new 15 hour UASFLA class in September 2017.

University of Portland, Adjunct Assistant Professor, Pamplin School of Business, Real Estate Finance course for MBA and business majors (Business 491/562), January 2011 - present.

Portland State University, Adjunct Professor, School of Business Administration (Center for Real Estate), Real Estate Valuation I course for MRED and business majors (Real Estate 439/539), January 2008 - present.

Marylhurst University, Center for Professional Real Estate Studies, Marylhurst, Oregon, 2001-2008; Adjunct Instructor. Developed and taught RE 350E-Building Design & Construction; RE 430E-Environmental Issues and Hazards; RE 440-The Real Estate Development Process.

Oregon Society of CPA's, 2013 & 2014 Real Estate Conferences. Land Trust Alliance, 2011 National Rally, Milwaukee, Wisconsin. International Right of Way Association, 2005, '06, '13: Measure 37 Appraisals; Wetlands; The Ethical Dilemma. American College of Real Estate Appraisal, 2002-2006, Income Property Appraisal; Basic Appraisal; Case Studies; Vacant Land Appraisal; Highest & Best Use; Condemnation; USPAP. Mt. Hood Community College, 1999 and 2003, Transitional Properties; Vacant Land; Residential Construction; Condemnation; USPAP. McKissock, 2000-2003, Factory-built Housing; Current Issues; Vacant Land Appraisal; Residential Report Writing; Income Property Appraisal; USPAP.

COMMUNITY SERVICE & PROFESSIONAL ACTIVITIES

- Washington County Planning Commission
- PSU Center for Real Estate Studies, Scholarship Committee
- Fundraising activities for local schools
- Contributor to *The Dictionary of Real Estate Appraisal*, 4<sup>th</sup> Ed., Appraisal Institute, Chicago 2002

PARTIAL LIST OF CLIENTS

Bullivant Houser	Bank of the West	US Department of Justice
Cofield Law Office	Bank of the Cascades	US Army Corps of Engineers
Davis Rothwell	Umpqua Bank	Bureau of Reclamation
Dunn Carney	Metro	Oregon Dept. of State Lands
Gevurtz Menashe	TriMet	Cowlitz Indian Tribe
Lindsay Hart	Bonneville Power Administration	Confederated Tribes of Warm Springs
Markowitz Herbold	Bureau of Land Management	Western Rivers Conservancy
Moore & Ballard	National Park Service	Ducks Unlimited
Samuels Yoelin Kantor	Oregon Parks & Recreation	The Trust for Public Land
Smith Freed & Eberhard	US Fish & Wildlife Service	The Nature Conservancy
Zupancic Group	Oregon Dept. of Transportation	Columbia Land Trust

OREGON STATE GENERAL CERTIFICATION C000543



Expiration Date: 3/31/2018

WASHINGTON GENERAL CERTIFICATION 1101827



Expiration Date: 3/02/2019

CONSERVATION EASEMENT CERTIFICATE



THE CERTIFICATE OF COMPLETION DOES NOT PROVIDE CERTIFICATION OF ANY KIND, NOR DOES IT ATTEST TO THE COMPETENCY OF THE PARTICIPANTS.

**STEVEN M. BEAMAN, CCIM**  
 OREGON GENERAL CERTIFIED APPRAISER - C000737  
 Senior Appraiser - Real Estate Services Group, Inc.  
 10961 NW Crystal Creek, Portland, Oregon 97229  
 Telephone: 503 453.7072 · Email: sbeaman@ccim.net

**EDUCATION**

Undergraduate Degree:  
 University:

1996 - BBA (Finance)  
 University of Portland – Portland, Oregon

**Appraisal Courses:**

McKissock  
 McKissock  
 Appraisal Institute  
 Appraisal Institute Course 510  
 Appraisal Institute Course 330  
 Appraisal Institute  
 Appraisal Institute  
 Appraisal Institute  
 Appraisal Institute  
 Appraisal Institute  
 Appraisal Institute  
 Appraisal Institute  
 Appraisal Institute  
 Appraisal Institute  
 Appraisal Institute  
 Allied Business School  
 Allied Business School

National USPAP Update (2/12, 2/14, 2/16)  
 Appraisal Applications of Regression Analysis (2/14)  
 Appraisal of Nursing Facilities (2/12)  
 Advanced Income Capitalization – (9/05)  
 Apartment Appraisal – (2/08)  
 Appraising Small Apartment Properties (2/16)  
 Business Practice and Ethics (4/11)  
 Eminent Domain & Condemnation (2/10)  
 Small Hotel/Motel Valuation (2/04)  
 Analyzing Income Statements (2/04)  
 Business Practices and Ethics (2/04, 4/11)  
 USPAP Update (12/03, 2/06, 2/08, 1/10)  
 REIT's & the Role of the R.E. Professional (7/00)  
 Understanding & Using DCF Software (3/99)  
 Real estate Appraisal (6/99)  
 Income Property Valuation (8/99)

**Real Estate Courses:**

CCIM Institute CI Intro  
 CCIM Institute CI 101  
 CCIM Institute CI 102  
 CCIM Institute CI 103  
 CCIM Institute CI 104  
 Allied Business School  
 Allied Business School  
 Allied Business School  
 Pro Schools  
 Pro Schools  
 Pro Schools  
 Pro Schools  
 Pro Schools  
 Argus

Introduction to Commercial Investment R.E (4/02)  
 Financial Analysis for Comm. Investment R.E. (8/99)  
 Market Analysis for Comm. Investment R.E. (5/00)  
 Lease Analysis for Comm. Investment R.E. (9/99)  
 Investment Analysis for Comm. Investment R.E. (9/00)  
 Escrows (8/01)  
 Real Estate Practice (8/02)  
 Legal Aspects of Real estate (7/02)  
 Real Estate Law (11/04), Contracts (11/04)  
 Real Estate Finance (11/04), Agency (11/04)  
 Oregon Real Estate Practice (11/04)  
 Property Management (11/04)  
 Real Estate Brokerage (11/04)  
 Argus Power User Training Seminar (6/01)

**LICENSING AND PROFESSIONAL AFFILIATIONS**

Certified Commercial Investment Member, CCIM (10373 - Designation Awarded 2002)  
 Oregon State Certified General Appraiser (Certificate C000737; First Certified 2002, Expires 2/28/2018)  
 Associate Member, Appraisal Institute (406023)

**REAL ESTATE APPRAISAL & CONSULTING EXPERIENCE**

December, 2007 - Present	Independent Commercial R.E. Appraiser S.M. Beaman & Associates, LLC (OR)
January, 2003 – November, 2007	Commercial R.E. Appraiser R.P. Herman & Associates (OR)
January, 2002 – December, 2002	Commercial R.E. Appraiser SM Beaman & Associates (OR/CA)
June, 1998 – January, 2002	Commercial R.E Appraiser/Trainee Hulberg & Associates, Inc. (CA)

**TYPES OF APPRAISAL ASSIGNMENTS**

Commercial:	Single and Multi-Tenant Retail, Neighborhood Centers, Regional Centers, Auto Dealerships, Restaurants, Convenience Stores, Single and Multi Tenant Office, Professional Office, Medical/Dental Office, Churches, Proposed Construction.
Industrial:	Single and Multi Tenant, Incubator Space, Warehouses, Distribution, Manufacturing, Flexible Use.
Residential:	Single-Family, Duplex, Multi-Family, HUD Properties, Manufactured Home Parks, Recreational Vehicle Parks.
Land:	Commercial, Industrial, Residential, Subdivision, Forest, Farm and Open Space.
Special Purpose:	Commercial Redevelopment, Vacations.
UASFLA "Yellow Book":	Full Take, Partial Acquisition, Easements
Other Services:	Expert Witness Testimony, HUD Rent Surveys, Consulting.

• Additional details and references are available upon request.



**OREGON GENERAL CERTIFICATION C000737**  
 Certification Valid 3/1/2018 – 2/29/2020

**SUBJECT PROPERTY DATA**

Presented by: Steven Beaman  
S M Bearman @ Associates, LLC

3/16/2018 2:03:11 PM

WASHINGTON COUNTY, OR

Tax ID: R0523650  
Prop Addr: 10605 SW HAZELBROOK RD  
City/State/Zip: TUALATIN OR 97062-8025  
Latest Listing ID: 11650001  
County: Washington  
Carrier Rt: R015

OWNER INFORMATION

Owner Name: BOSAK ROBERT E & BOSAK MARY C  
Owner Addr: 10605 SW HAZELBROOK RD  
City/State/Zip: TUALATIN OR 97062-8025  
Phone:  
Carrier Rt: R015

LAND INFORMATION

Lot SqFt: 179903  
Acreage: 4.13

BUILDING INFORMATION

Year Built: 1928  
Stories: 4  
# of Bldgs: 4  
Bldg Code: SINGLE FAMILY  
Fireplace: 1  
Heat Method: HEAT PUMP  
Bedrooms: 3  
Bathrooms: 3  
Living SF: 3652  
Bldg SF Ind: LIVING  
Bsmnt SF: 900  
Mobile Home:  
Garage: 080  
Parking SF: 600  
Foundation: CONTINUOUS FOOTING  
Floor Cover:  
Roof Cover: COMPOSITION  
Exterior Finish: WOOD SHEATHING

SALES INFORMATION

	Deed Type	Sale Date	Sale Price	Document No
Current:		7/20/1990	\$135,000	
Prior:				

Title Co:  
Lender:  
Loan Type:  
Loan Amt: \$0

TAX INFORMATION

Tax Period:	17-18	Market Land:	\$497,140	
Tax Year:	2017	Market Impv:	\$217,830	
Tax Amt:	\$6,328.60	Market Total:	\$714,970	Assessed Total: \$378,890

LEGAL INFORMATION

Map Page:	0	Map Code:	2S-1W-15-SE-NE	Census Tract:	320012005
Map Column:		Township:	02S	Census Block:	
Map Row:	0	Range:	01W	Lot:	26
		Section:	15	Zoning:	RL
Nbrhd Code:	TRVR	Qtr Section:	SE	Tax Area Code:	02376
School Dist:	TIGARD	16th Section:	NE	Tax Rate:	0.000

Prop Class: SINGLE FAMILY RESIDENCE / TOWNHOUSE  
Land Use: SFR  
Subdivision: HAZELBROOK FARM  
Legal Desc: HAZELBROOK FARM, LOT PT 26, ACRES 4.13

**ZONING CODE EXCERPTS**



Published on *The City of Tualatin Oregon Official Website* (<https://www.tualatinoregon.gov>)

## TDC 40: Low Density Residential Planning District (RL)

### Development Code:

Chapter 40: Low Density Residential Planning District (RL)

### Tags:

Permitted Density Permitted Uses Conditional Uses Permitted Lot Size for Permitted Uses Lot Size for Greenway and Natural Areas Tracts and Lots Lot Size for Conditional Uses Setback Requirements for Conditional Uses Setback Requirements Adjacent

### Details

### Sections:

[40.010 Purpose.](#)

[40.015 Permitted Density.](#)

[40.020 Permitted Uses.](#)

[40.030 Conditional Uses Permitted.](#)

[40.050 Lot Size for Permitted Uses.](#)

[40.055 Lot Size for Greenway and Natural Area Tracts and Lots.](#)

[40.060 Lot Size for Conditional Uses.](#)

[40.070 Setback Requirements for Permitted Uses.](#)

[40.080 Setback Requirements for Conditional Uses.](#)

[40.085 Setback Requirements Adjacent to the Norwood Expressway.](#)

[40.090 Projections Into Required Yards.](#)

[40.100 Structure Height.](#)

[40.110 Access.](#)

[40.120 Off-Street Parking and Loading.](#)

[40.130 Floodplain District.](#)

[40.140 Community Design Standards.](#)

[40.145 Placement Standards for Manufactured Homes.](#)

[40.150 Landscape Standards.](#)

### Section 40.010 Purpose.

The purpose of this district is to provide low density residential areas in the City that are appropriate for dwellings on individual lots, as well as other miscellaneous land uses compatible with a low density residential environment. [Ord. 590-83 §1, 4/11/83; Ord. 592-83 §6, 6/13/83; Ord. 661-85 §3, 3/25/85; Ord. 956-96 §10, 1/8/96]

### Section 40.015 Permitted Density.

Housing density shall not exceed 6.4 units per net acre, except as set forth below:

(1) The maximum density for small-lot subdivisions, and partitions and subdivisions affected

by [TDC 40.055](#), shall not exceed 7.5 dwelling units per net acre.

(2) The maximum density for retirement housing in accordance with [TDC 34.170\(2\)](#) <sup>(1)</sup> shall not exceed 10 dwelling units per net acre. [Ord. 956-96 §11, 1/8/96. by Ord. 1026-99 §21, 8/9/99; Ord. 1272-08 §5, 11/10/08; Ord. 1317-10 §3, 12/13/10]

### Section 40.020 Permitted Uses.

(1) Single-family dwellings, including manufactured homes.

(2) Agricultural uses of land, such as truck gardening, horticulture, but excluding commercial buildings or structures and excluding the raising of animals other than the following:

(a) Normal household pets;

(b) Chickens as otherwise allowed by the Tualatin Municipal Code.

(3) Home occupations as provided in [TDC 34.030 to 34.050](#) <sup>(1)</sup>.

(4) Public transit shelters.

(5) Greenways and Natural Areas, including but not limited to bike and pedestrian paths and interpretive stations.

(6) Residential homes.

(7) Residential facilities for up to 15 residents, not including staff.

(8) Family day care provider, provided that all exterior walls and outdoor play areas shall be a minimum distance of 400 feet from the exterior walls and pump islands of any automobile service station, irrespective of any structures in between.

(9) Sewer and water pump stations and pressure reading stations.

(10) Wireless communication facility attached, provided it is not on a single-family dwelling or its accessory structures.

(11) Accessory dwelling units as provided in [TDC 34.300 to 34.310](#) <sup>(1)</sup>.

(12) Transportation facilities and improvements.

(13) Public park, public playground, and public recreation building. [Ord. 590-83 §1, 4/11/83; Ord. 592-83 §6, 6/13/83; Ord. 818-91 §14, 1/14/91; Ord. 824-91 §1, 2/11/91; Ord. 849-91 §10, 11/25/91; Ord. 933-94 §16, 11/28/94; Ord. 965-96 §6, 12/9/96; Ord. 979-97 §9, 7/14/97, Ord. 1026-99 §22, 8/9/99; Ord. 1103-02, 3/25/02; Ord. 1317-10 §4, 12/13/10; Ord. 1363-13; §1, 12/9/13]

### Section 40.030 Conditional Uses Permitted.

The following uses and their accessory uses are permitted as conditional uses when authorized in accordance with [TDC Chapter 32](#) <sup>(2)</sup>:

(1) Common-wall dwellings.

(2) Condominium dwelling units provided they meet the following standards, notwithstanding other provisions of this Code, and meet the requirements of ORS 91.500.

(a) All units shall be on a primary lot with frontage on a public street or in accordance with [TDC 36.470](#) (3).

(b) Access to secondary lots and to all buildings on the primary lot from public streets shall be guaranteed physically and legally by restrictive covenants and homeowners' association bylaws prior to issuance of building permits for the project and after approval of the state pursuant to state statutes, or in accordance with [TDC 36.470](#) (3).

(3) Small-lot subdivisions conforming to the following standards:

(a) No small lot subdivision shall have less than ten lots.

(b) All subdivision improvements shall conform to [TDC Chapter 36](#) (3).

(c) All dwelling units constructed shall conform to the construction standards of the State of Oregon Uniform Building Code as adopted by the City of Tualatin.

(d) A tree survey shall be prepared and submitted as part of the conditional use application. This tree survey shall show the location of existing trees having a trunk diameter of eight inches or greater, as measured at a point four feet above ground level. The purpose of this survey shall be to show that, by utilizing the small lot subdivision provisions, a greater number of trees can be preserved than would be possible without use of the small lot subdivision provisions. As used in this section, the word "tree" means a usually tall, woody plant, distinguished from a shrub by having comparatively greater height and characteristically, a single trunk rather than stems.

(e) The small lots:

(i) Shall be no less than 5,000 and no more than 6,499 square feet.

(ii) When a small lot abuts an existing lot in a City approved and recorded subdivision or partition the small lot shall be no more than 500 square feet smaller than the size of the abutting lot. For example, a new small lot shall be no less than 5,500 square feet if it abuts an existing lot of 6,000 square feet; 5,600 square feet if it abuts an existing lot of 6,100 square feet; 5,700 square feet if it abuts an existing lot of 6,200 square feet; and so on, up to 5,999 square feet if it abuts an existing lot of 6,499 square feet.

(iii) When a small lot is directly across a local street from an existing lot in a City approved and recorded subdivision or partition the small lot shall be no more than 500 square feet smaller than the lot directly across the street.

(iv) When a Tract or easement is between a small lot and an existing lot in a City approved and recorded subdivision or partition the small lot shall be separated from the existing lot by at least 50 feet.

(v) For purposes of this subsection, a small lot is directly across the street if one or more of its lot lines, when extended in a straight line across the local street, intersect the property line of the lot across the street.

(vi) When a subdivision is constructed in phases, a small lot in a later phase may abut or be directly across a local street from an existing lot in an earlier phase.

(f) The small lots shall be part of a development that contains lots of at least 7,000 square feet that are necessitated by trees, steep terrain or other topographic constraints.

(g) The small lots shall not exceed 35 percent of the lots in the total subdivision.

(h) The number of lots having a minimum area of 7,000 square feet shall equal or be greater than the number of small lots in the subdivision.

(i) The average lot width shall be at least 30 feet.

(j) When a lot has frontage on a public street, the minimum lot width shall be 50 feet on a street and 30 feet around a cul-de-sac bulb.

(k) The maximum building coverage for lots 5,000 to 6,499 square feet shall be 45 percent and for lots greater than 6,499 square feet shall be 35 percent.

(l) For flag lots, the minimum lot width at the street shall be sufficient to comply with at least the minimum access requirements contained in [TDC 73.400\(7\) - \(12\)](#) (4).

(4) Other uses as specified below:

(a) Churches or other places of religious worship and accessory uses.

(b) Child day care center, if all exterior walls and outdoor play areas are a minimum distance of 400 feet from the exterior walls and pump islands of any automobile service station, irrespective of any structures in between.

(c) Governmental structure or land use including community buildings (public), fire station, public library or museum.

(d) Retail nursery.

(e) Hospital.

(f) Kindergarten through grade 12 school.

(g) Water reservoir with a maximum height of 75 feet.

(h) Golf course, country club with golf course.

(i) Agricultural animals, limited to cattle, horses and sheep, and agricultural structures such as barns, stables, sheds, but excluding feed lots, in areas designated on [Map 9-6](#) (5) Conditional Use of Agricultural Animals. The City Council may limit the number of animals to be allowed on a specific parcel of property.

(j) Increased building height to a maximum of 50 feet, if all yards adjoining said building are not less than a distance equal to 1 1/2 times the height of the building.

(k) Retirement housing conforming to the standards in [TDC 34.160 - 34.170](#) (1). [Ord. 590-83 §1, 4/11/83; Ord. 592-83 §6, 6/13/83; Ord. 614-84 §2, 1/9/84; Ord. 635-84 §11, 6/11/84; Ord. 661-85 §4, 3/25/85; Ord. 818-91 §15, 1/14/91; Ord. 923-94 §1, 5/9/94; Ord. 965-96 §7, 12/9/96; Ord. 1026-99 §23, 8/9/99; Ord. 1054-00 §2-4, 8/14/00; Ord. 1201-05, 11/28/05; Ord. 1317-10 §5, 12/13/10]

**40.040 [Repealed by Ord. 1026-99 §102. 8/9/99]**

**40.050 Lot Size for Permitted Uses.**

Except as otherwise provided, the lot size for a single-family dwelling shall be:

- (1) The minimum lot area shall be an average of 6,500 square feet.
- (2) The average lot width shall be at least 30 feet.
- (3) When a lot has frontage on a public street, the minimum lot width shall be 50 feet on a street and 30 feet around a cul-de-sac bulb.
- (4) The maximum building coverage shall be 45 percent.
- (5) For flag lots, the minimum lot width at the street shall be sufficient to comply with at least the minimum access requirements contained in TDC 73.400(7) - (12) <sup>(4)</sup>. [Ord. 590-83 §1, 4/11/83; Ord. 592-83 §6, 6/13/83; Ord. 866-92 §1, 4/27/92; Ord. 920-94 §2, 4/11/94; Ord. 956-96 §12, 1/8/96; Ord. 1010-98 §1, 12/14/98; Ord. 1026-99 § 24, 8/9/99; Ord. 1054-00 §6, 8/14/00; Ord. 1055-00 §1, 8/28/00; Ord. 1272-08 §6, 11/10/08]

**Section 40.055 Lot Size for Greenway and Natural Area Tracts and Lots.**

(1) The decision authority for partitions and subdivisions may allow one small lot for each 6,500 square feet of Tract created in the subdivision or partition process, provided the following criteria are met:

- (a) Each Tract must be:
  - (i) wholly in the Natural Re-source Protection Overlay (NRPO) District (TDC Chapter 72) <sup>(6)</sup>, or
  - (ii) wholly in an Other Natural Areas identified in Figure 3-4 <sup>(7)</sup> of the Parks and Recreation Master Plan, or
  - (iii) wholly in a Clean Water Services Vegetated Corridor.
- (b) The ownership of each Tract must be one of the following:
  - (i) dedicated to the City at the City's option, or
  - (ii) dedicated in a manner approved by the City to a non-profit conservation organization, or
  - (iii) retained in private ownership by the developer.
- (c) The small lot:
  - (i) Shall be no less than 5,000 square feet and no more than 5,999.99 square feet.
  - (ii) The average lot width shall be at least 30 feet.
  - (iii) The minimum lot width shall be 50 feet on a street and 30 feet around a cul-de-sac bulb.
  - (iv) The maximum building coverage for lots less than 6,000 square feet shall be 45 percent.

(v) The subdivision's or partition's density, net of the Tracts, shall not exceed 7.5 dwelling units per acre.

(2) The decision authority for partitions and subdivisions shall consider, but is not limited to, the following factors when determining if TDC 40.055(1)(b)(i - iii) are allowed:

- (a) Does the Park and Recreation Master Plan designate the Tract for a greenway, pedestrian or bike path, public park, recreation, overlook or interpretive facility, or other public facility;
  - (b) Does the Tract include one or more designated Heritage Trees, or one or more significant trees;
  - (c) Does the Tract provide a significant view or esthetic element, or does it include a unique or intrinsically valuable element;
  - (d) Does the Tract connect publicly owned or publicly accessible properties;
  - (e) Does the Tract abut an existing park, greenway, natural area or other public facility;
  - (f) Does the Tract provide a public benefit or serve a public need;
  - (g) Does the Tract contain environmental hazards;
  - (h) Geologic stability of the Tract; and
  - (i) Future maintenance costs for the Tract.
- (3) The following shall apply to small lots included in a partition or subdivision pursuant to (1) above:
- (a) When a small lot abuts an existing lot in an approved and recorded subdivision or partition the small lot shall be no more than 500 square feet smaller than the abutting lot. For example, a new small lot shall be no less than 5,500 square feet if it abuts an existing lot of 6,000 square feet; 5,600 square feet if it abuts an existing lot of 6,100 square feet; 5,700 square feet if it abuts an existing lot of 6,200 square feet; and so on, up to 5,999 square feet if it abuts an existing lot of 6,499 square feet.
  - (b) When a small lot is directly across a local street from an existing lot in a City approved and recorded subdivision or partition the small lot shall be no more than 500 square feet smaller than the lot directly across the street. For purposes of this section, a small lot is directly across the street if one or more of its lot lines, when extended in a straight line across the local street, intersect the property line of the lot across the street.
  - (c) When a Tract or easement is be-tween a small lot and an existing lot in a City approved and recorded subdivision or partition the small lot shall be separated from the existing lot by at least 50 feet.
  - (d) When a subdivision is constructed in phases, a small lot in a later phase may abut or be directly across a local street from an existing lot in an earlier phase. [Ord. 933-94 §17, 11/28/94; Ord. 956-96 §13, 1/8/96; Ord. 979-97 §10, 7/14/97; Ord. 1010-98 §2, 12/14/98; Ord. 1026-99 §25, 8/9/99; Ord. 1136-03, 4/28/03; Ord. 1201-05, 11/28/05; Ord. 1224-06 §4, 11/13/06]

**Section 40.060 Lot Size for Conditional Uses.**

Except as otherwise provided, the lot size for conditional uses shall be:

- (1) The minimum lot area shall be 6,000 square feet, excepting secondary condominium lots as approved through the Architectural Review process and lots for public utility facilities.
- (2) The average lot width shall be at least 60 feet, excepting secondary condominium lots as approved through the Architectural Review process and lots for public utility facilities.
- (3) When a lot has frontage on a public street, the minimum lot width shall be 50 feet on a street and 30 feet around a cul-de-sac bulb, excepting secondary condominium lots as approved through the Architectural Review process and lots for public utility facilities.
- (4) The maximum building coverage on a lot shall be 40 percent, excepting secondary condominium lots as approved through the Architectural Review process and lots for public utility facilities.
- (5) For flag lots, the minimum lot width at the street shall be sufficient to comply with at least the minimum access requirements contained in TDC 73.400(7) to (12) <sup>(4)</sup>. [Ord. 590-83 §1, 4/11/83; Ord. 592-83 §6, 6/13/83; Ord. 866-92 §2, 4/27/92; Ord. 920-94, §3, 4/11/94; Ord. 923-94, §2, 5/9/94; Ord. 956-96 §14, 1/8/96, Ord. 1026-99 §26, 8/9/99; Ord. 1054-00 §7, 8/14/00]

#### Section 40.070 Setback Requirements for Permitted Uses.

Except as otherwise provided, the setbacks for permitted uses shall be:

- (1) The front yard setback shall be a minimum of 15 feet, except to an unenclosed porch, which shall be 12 feet.
- (2) The setback to a garage door shall be a minimum of 20 feet.
- (3) The side yard setback shall be a minimum of five feet.
- (4) For a corner lot, the following provisions shall apply:
  - (a) one front yard setback shall be a minimum of 15 feet; it shall be determined by the orientation of the structure based on the location of the front door.
  - (b) the second front yard setback shall be a minimum of 10 feet.
- (5) The rear yard setback shall be a minimum of 15 feet. [Ord. 590-83 §1, 4/11/83; Ord. 592-83 §6, 6/13/83; Ord. 731-87 §1, 9/14/87; Ord. 743-88 §46, 3/28/88; Ord. 956-96 §15, 1/8/96; Ord. 965-96 §8, 12/9/96; Ord. 1026-99 §27 8/9/99; Ord. 1076-01 §1, 7/9/01]

#### Section 40.080 Setback Requirements for Conditional Uses.

- (1) Except as otherwise provided, the setbacks for conditional uses shall be as determined and approved through the Architectural Review process. However, no setback greater than 50 feet may be required. Off-street parking and vehicular circulation areas shall be set back a minimum of ten feet from any public right-of-way or property line.
- (2) Setback requirements for small lot subdivisions shall comply with the setback requirements for permitted uses as set forth in TDC 40.070. [Ord. 590-83 §1, 4/11/83; Ord. 592-83 §6, 6/13/83; Ord. 862-92 §3, 3/23/92; Ord. 904-93 §2, 9/13/93; Ord. 923-94 §3, 5/9/94]

#### Section 40.085 Setback Requirements Adjacent to the Norwood Expressway.

A setback no less than 50 feet in depth will be provided adjacent to the Norwood Expressway right-of-way. [Ord. 592-83 §69, 6/13/83]

#### Section 40.090 Projections Into Required Yards.

Cornices, eaves, canopies, decks, sun-shades, gutters, chimneys, flues, belt courses, leaders, sills, pilasters, lintels, ornamental features, and other similar architectural features may extend or project into a required front or rear yard setback area not more than three feet and into a required side yard not more than two feet, or into the required open space as established by coverage standards in this chapter. [Ord. 590-83 §1, 4/11/83; Ord. 592-83 §6, 6/13/83; Ord. 731-87 §2, 9/14/87]

#### Section 40.100 Structure Height.

Except as otherwise provided, the maximum structure height is 35 feet. [Ord. 590-83 §1, 4/11/83; Ord. 592-83 §6, 6/13/83; Ord. 956-96 §16, 1/8/96; Ord. 965-96 §9, 12/9/96]

#### Section 40.110 Access.

Refer to TDC 36.470 <sup>(8)</sup> and 73.400 <sup>(4)</sup>. [Ord. 590-83 §1, 4/11/83; Ord. 592-83 §6, 6/13/83; Ord. 872-92 §2, 6/29/92; Ord. 956-96 §17, 1/8/96, Ord. 1026-99 §28, 8/9/99; Ord. 1054-00 §8, 8/14/00]

#### Section 40.120 Off-Street Parking and Loading.

Refer to TDC Chapter 73 <sup>(4)</sup>.

#### Section 40.130 Floodplain District.

Refer to TDC Chapter 70 <sup>(8)</sup>.

#### Section 40.140 Community Design Standards.

(1) Development of the following is subject to the provisions set forth in TDC 40.140(2) and standards and criteria set forth in TDC Chapter 73 <sup>(4)</sup>, in addition to all other applicable TDC standards:

- (a) A new single-family dwelling.
- (b) An addition or alteration to an existing single-family dwelling when it results in a 35% or more expansion of the structure's existing footprint or a new second or higher story or a 35% or more alteration of an existing wall plane (except for the wall plane of a side of the dwelling located in a side yard where the side yard of the dwelling abuts the side yard of an adjacent dwelling).
  - (i) Where a single-family dwelling addition or alteration described in TDC 40.140(1)(b) is proposed, TDC 40.140(2) applies only to the portion of the structure being altered or added.
- (2) No building permits shall be issued for development described in TDC 40.140(1) until

plans for the proposed development have been approved pursuant to one of the following two review options, and all other applicable TDC standards are met:

(a) LEVEL I – Clear and Objective Single-family Architectural Review.

(i) A Level I Single-family Architectural Review decision is a ministerial decision.

(ii) Application for Level I (Clear and Objective) Single-family Architectural Review shall be made pursuant to the application procedures set forth in [TDC 31.071\(7\)\(a\)](#) [9].

(iii) Proposed development that meets all standards set forth in [TDC 73.190\(1\)\(a\)](#) [4] shall be administratively approved by the Community Development Director.

(iv) Variances to standards set forth in [TDC 73.190\(1\)\(a\)](#) [4] are prohibited.

(v) Development unable to meet one or more of the standards set forth in [TDC 73.190\(1\)\(a\)](#) [4] may alternatively submit application for Level II (Discretionary) Single-family Architectural Review.

(b) LEVEL II – Discretionary Single-family Architectural Review.

(i) Proposed development that meets all approval criteria set forth in [TDC 73.190\(1\)\(b\)](#) [4] shall be approved by the Community Development Director.

(ii) Application for Level II (Discretionary) Single-family Architectural Review shall be made pursuant to the application procedures set forth in [TDC 31.071\(7\)\(b\)](#) [9].

(iii) A Level II (Discretionary) Single-family Architectural Review application shall be processed as a limited land use decision pursuant to the provisions set forth in [TDC 31.071\(7\)\(b\)](#) [9].

(3) Where a site, structure, or object is designated a historic landmark, and pro-posed development is subject to [TDC Chapter 68](#) [10], Historic Certificate of Appropriateness review, conditions of Certificate of Appropriateness approval may, at the discretion of the decision-making authority, include modification of one or more of the standards set forth in [TDC 73.190\(1\)\(a\)](#) [4], or modification of one or more of the discretionary approval criteria set forth in [TDC 73.190\(1\)\(b\)](#) [4], in order to meet the Certificate of Appropriateness approval criteria. [Ord. 1260-08 §4, 5/12/08]

### Section 40.145 Placement Standards for Manufactured Homes.

Except for manufactured homes placed in manufactured dwelling parks, no manufactured home shall be permitted that does not meet the following standards.

(1) The manufactured home shall be multi sectional and shall enclose a space of not less than 1,000 square feet. A manufactured home shall not be considered multi sectional by virtue of having a tip-out section.

(2) The manufactured home shall be placed on an excavated and back-filled foundation, and enclosed at the perimeter such that the manufactured home is located not more than 12 inches above grade. However, a structural concrete foundation such as that required for a single-family dwelling constructed on the site shall not be required.

(3) The manufactured home shall have a pitched roof with a minimum slope of one foot in height for each four feet of width.

(4) The roof of the manufactured home shall be shingles, wood shakes, tiles, or other materials which create an appearance similar to shingles, wood shakes or tiles. Exposed flat, corrugated or ribbed sheet metal, fiberglass, or other materials similar in form or appearance shall not be used as roofing material, except that they may be used for corner and edge flashing.

(5) The manufactured home shall be certified by the manufacturer to have an exterior thermal envelope meeting performance standards which reduce heat loss to levels equivalent to the performance standards required of single family dwellings constructed under the State Building Code as defined in ORS 455.010.

(6) The manufactured home shall have an attached or detached two-car garage constructed of materials similar to the manufactured home. [Ord. 818-91, §16, 1/14/91; Ord. 988-97 §4, 12/8/97]

### Section 40.150 Landscape Standards.

Refer to [TDC Chapter 73](#) [11]. [Ord. 725-87 §13, 6/22/87]

[<<Previous Chapter](#) [12] [<<Table of Contents](#) [13] [<<Search](#) [14] [Next Chapter>>](#) [15]

[Return to Top](#)

Source URL: <https://www.tualatinoregon.gov/developmentcode/tdc-40-low-density-residential-planning-district-rl>

#### Links:

- [1] <http://www.tualatinoregon.gov/developmentcode/tdc-chapter-34-special-regulations>
- [2] <http://www.tualatinoregon.gov/developmentcode/tdc-chapter-32-conditional-uses>
- [3] <http://www.tualatinoregon.gov/developmentcode/tdc-chapter-36-subdividing-partitioning-and-property-line-adjustments>
- [4] <http://www.tualatinoregon.gov/developmentcode/tdc-chapter-73-community-design-standards>
- [5] <http://www.tualatinoregon.gov/sites/default/files/fileattachments/developmentcode/3513/map9-8agriculturalanimals.pdf>
- [6] <http://www.tualatinoregon.gov/developmentcode/tdc-chapter-72-natural-resource-protection-overlay-district-nrpo>
- [7] [http://www.tualatinoregon.gov/sites/default/files/fileattachments/developmentcode/3461/tualatin\\_parks\\_and\\_rec\\_plan\\_figure\\_3-4.pdf](http://www.tualatinoregon.gov/sites/default/files/fileattachments/developmentcode/3461/tualatin_parks_and_rec_plan_figure_3-4.pdf)
- [8] <http://www.tualatinoregon.gov/developmentcode/tdc-70-flood-plain-district-fp>
- [9] <http://www.tualatinoregon.gov/developmentcode/tdc-chapter-31-general-provisions>
- [10] <http://www.tualatinoregon.gov/developmentcode/tdc-68-historic-preservation>
- [11] <https://www.tualatinoregon.gov/developmentcode/tdc-chapter-73-community-design-standards>
- [12] <http://www.tualatinoregon.gov/developmentcode/tdc-38-sign-regulations>
- [13] <http://www.tualatinoregon.gov/developmentcode/development-code-table-contents>
- [14] <http://www.tualatinoregon.gov/developmentcode>
- [15] <https://www.tualatinoregon.gov/developmentcode/tdc-41-medium-low-density-residential-planning-district-rml>

**OWNER NOTIFICATION**

MATTHEW LARRABEE, M.ARCH., MAI  
Certified General Appraiser  
Oregon #C000543



January 29, 2018

Robert and Mary Bosak  
10605 SW Hazelbrook Road  
Tualatin, OR 97062  
503 312-9824  
Bob.RCR@hotmail.com

**Subject:** Proposed acquisition by the City of Tualatin of Greenway Tract B of Hazelbrook Estates, north of SW Hazelbrook Rd., Tualatin

**15 Day Notice of Inspection - via Email**

Dear Mr. and Mrs. Bosak:

The City of Tualatin would like to acquire the property noted above as part of a public project. My firm has been hired to appraise the real estate in order to estimate its value. At this time, I would like to invite you or your designated representatives to accompany me during my inspection. Oregon state law requires that unless otherwise agreed by both parties, the property owner be given **fifteen days notice** prior to an inspection of the property. This letter serves to fulfill that requirement. Unless otherwise arranged the inspection will be on or after February 14, 2018.

Please sign below to acknowledge that you authorize my inspection and appraisal of your property, and to let me know whether you would like to schedule a specific time for my visit, whether you would like to accompany me, or if I may visit at any time at my convenience.

Thank you for your cooperation and time. If you have any questions feel free to email or call me.

Sincerely,   
Matthew Larrabee, M.Arch, MAI  
Principal Appraiser  
Real Estate Services Group, Inc.

-----  
The undersigned acknowledges this letter and grants permission to Real Estate Services Group, Inc., its agents and employees to conduct the inspection for the appraisal.

- Please contact me to set up an appointment for the inspection.
  - I wish to accompany the appraiser during the property inspection.
  - I do not wish to accompany the appraiser during the property inspection, but would like to know when the appraiser will visit my property.
- Proceed with your inspection at any time—I do not wish to accompany you on your inspection and I authorize you to visit my property at your convenience on any weekday between 8:00 a.m. and 5:00 p.m.

Date: \_\_\_\_\_

By: \_\_\_\_\_

Phone: \_\_\_\_\_

Print Name: \_\_\_\_\_

Email: \_\_\_\_\_

**Matthew Larrabee, MAI**

**From:** Robert Bosak <Bob.RCR@hotmail.com>  
**Sent:** Monday, January 29, 2018 13:32  
**To:** Matthew Larrabee, MAI  
**Subject:** Re: City of Tualatin-Appraisal of your land

You have our permission to walk the property.

Sent from my iPhone

On Jan 29, 2018, at 1:31 PM, Matthew Larrabee, MAI <[matthew@resg.us](mailto:matthew@resg.us)> wrote:

Bob and Mary,

The City of Tualatin has engaged my services to appraise riverfront Tract B on your proposed subdivision.

Please see the attached notice, and let me know whether a site visit on the morning of February 16 would be convenient for you. Meeting me there would be at your option, you do not need to be there during the site walk.

Do I have your permission to walk the land for the purpose of the appraisal?

Thank you,  
Matthew

**Matthew Larrabee, M.Arch., MAI**  
Principal Appraiser  
Real Estate Services Group, Inc.  
10961 NW Crystal Creek  
Portland, Oregon 97229

[www.LarrabeeMAI.com](http://www.LarrabeeMAI.com)  
503.799.3374

<18111\_15 Day Letter BOSAK.pdf>



Virus-free. [www.avg.com](http://www.avg.com)







*City of Tualatin*

## 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:** August 10, 2020

---

**SUBJECT:**  
Quarterly Financial Report

**EXECUTIVE SUMMARY:**

A lot has happened in the last 5 months with the impacts of the COVID-19 pandemic. Some of these impacts were mentioned during the Budget Committee and budget adoption process. Staff will provide an update on these impacts and discuss the differences in our revenues and expenditures between fiscal year ending June 30, 2019 and fiscal year ending June 30, 2020.

Attached are documents that will also be discussed in the presentation. The first is the quarter ending June 30, 2020 investment report. Staff will discuss the status of our investment portfolio and the impact of the economy on our investments.

The other documents attached are annual communications from our auditors about the audit for the fiscal year ending June 30, 2020. This communication from the auditors to the Governing Body is required under Generally Accepted Auditing Standards. There is a separate letter to the Mayor and Council related to the City's audit and to the Tualatin Development Commission Board of Commissioners for the Commission's audit.

---

**ATTACHMENTS:**

- Quarterly Financial Report Presentation
- Investment Reports for Quarter Ending June 30, 2020
- Auditor's Communication with Those Charged with Governance



# Tualatin City Council Investment Report

04/01/2020 - 06/30/2020

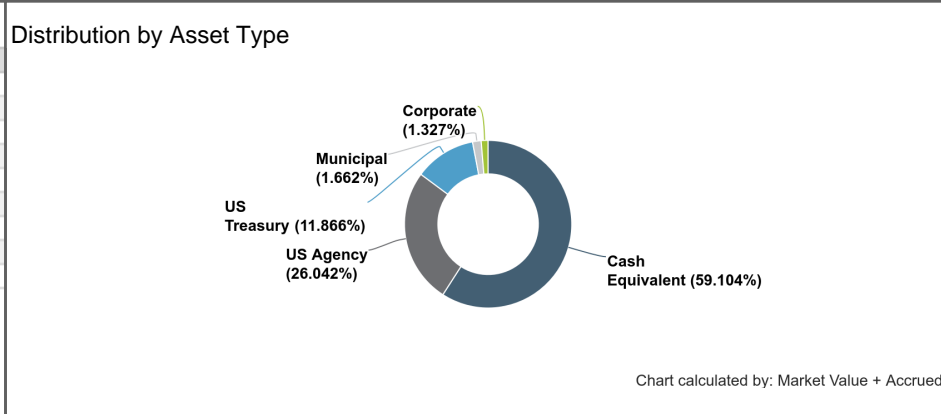
[Return to Table of Contents](#)

# TUAL\_Total Portfolio (176858)

Dated: 07/29/2020

Portfolio Characteristics	
	Portfolio
Par Amount	76,451,658.77
Book Value	76,647,183.01
Market Value	77,403,779.00
Accrued Balance	123,887.79
Market Value + Accrued	77,527,666.79
Net Unrealized Gain/Loss	756,595.99
Yield at Cost	1.497
Effective Duration	0.722
Maturity in Years	0.747

Footnote: 1



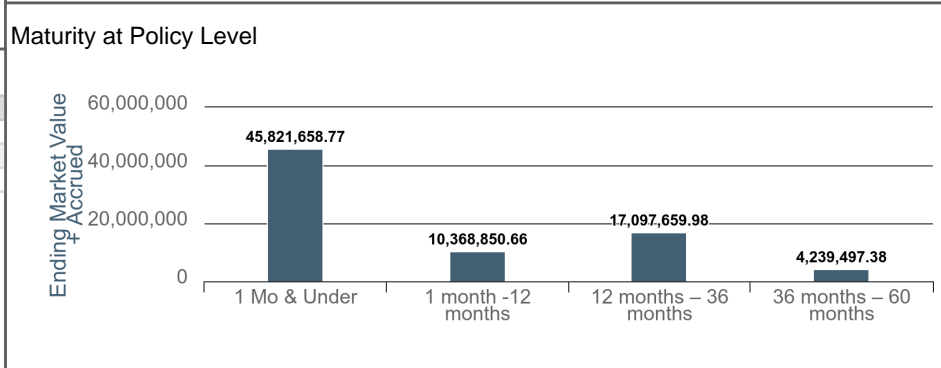
### Asset Allocation at Policy Level

GPA Asset Class	Ending Market Value + Accrued	% of Ending Market Value + Accrued
Bank Deposit	2,654,521.77	3.424%
Corporate	1,028,833.69	1.327%
FAMC	249,619.56	0.322%
FFCB	6,050,010.88	7.804%
FHLB	13,389,698.14	17.271%
FNMA	500,274.11	0.645%
Municipal	1,288,146.54	1.662%
Pooled Funds	43,167,137.00	55.680%
US Treasury	9,199,425.10	11.866%
<b>Total</b>	<b>77,527,666.79</b>	<b>100.000%</b>

Footnotes: 2,3,4

### Compliance Overview

Status	Non-Compliant
As of	06/30/2020
Violations	1



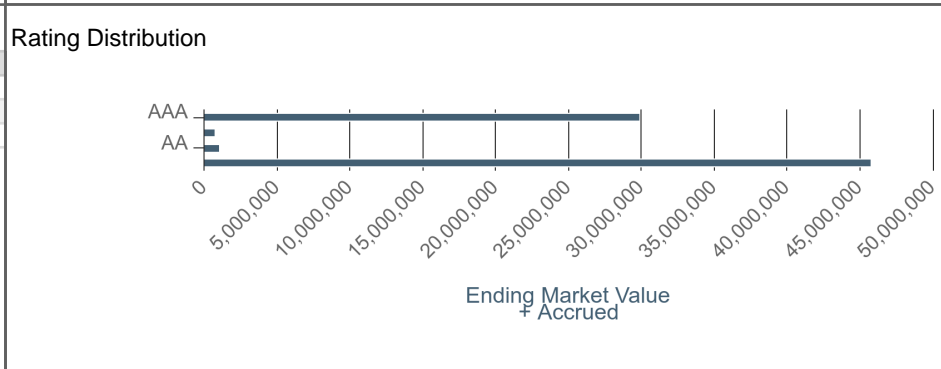
### Activity Summary

	Portfolio
Beginning Book Value	82,468,544.33
Purchases	4,187,805.58
Sales	-6,754,699.72
Net Amortization/Accretion Income	-17,764.04
Change In Cash	0.00
Net Realized Gain/Loss	13,296.86
Ending Book Value	76,647,183.01

Footnote: 4

### Reconciliation Status

Custody Reconciliation Status	Reconciled
Custody Last Reconciled For	07/28/2020
Trading System Last Reconciled For	07/06/2020



### Earnings Summary

	Portfolio
Net Amortization/Accretion Income	-17,764.04
Interest Earned	356,971.46
Net Realized Gain/Loss	13,296.86
Earned Income	352,504.28
Book Yield	1.497

Footnotes: 4,5

1: \* Weighted by: Market Value + Accrued. 2: \* Grouped by: GPA Asset Class. 3: \* Groups Sorted by: GPA Asset Class. 4: \* Weighted by: Ending Market Value + Accrued. 5: \* Formula Column: Earned Income = [Interest Earned]+[Net Amortization/Accretion Income]+[Net Realized Gain/Loss].



# Tualatin City Council Investment Report

04/01/2020 - 06/30/2020

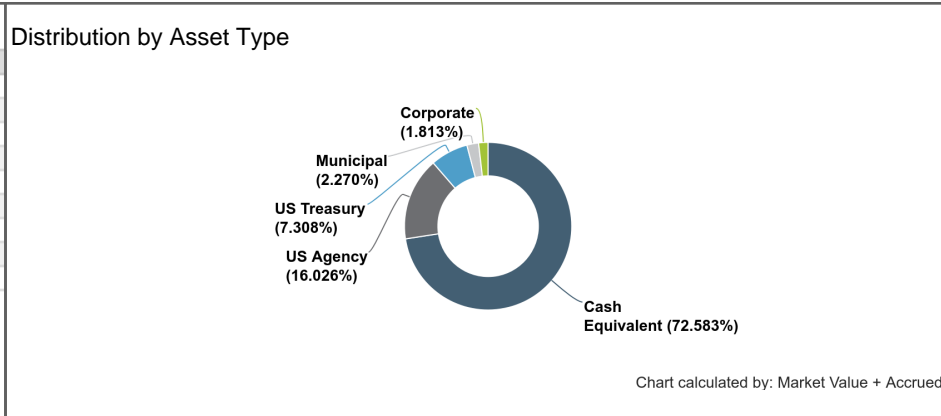
[Return to Table of Contents](#)

# TUAL-General Fund Portfolio (176862)

Dated: 07/29/2020

Portfolio Characteristics	
	<i>Portfolio</i>
Par Amount	56,130,254.80
Book Value	56,266,238.46
Market Value	56,672,475.88
Accrued Balance	77,013.03
Market Value + Accrued	56,749,488.92
Net Unrealized Gain/Loss	406,237.43
Yield at Cost	1.471
Effective Duration	0.575
Maturity in Years	0.602

Footnote: 1



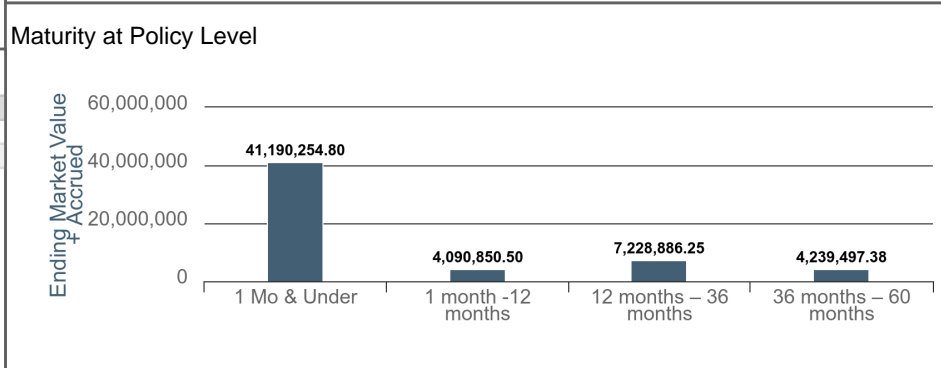
### Asset Allocation at Policy Level

GPA Asset Class	Ending Market Value + Accrued	% of Ending Market Value + Accrued
Bank Deposit	369,396.77	0.651%
Corporate	1,028,833.69	1.813%
FAMC	249,619.56	0.440%
FFCB	3,122,125.92	5.502%
FHLB	5,222,780.43	9.203%
FNMA	500,274.11	0.882%
Municipal	1,288,146.54	2.270%
Pooled Funds	40,820,858.03	71.932%
US Treasury	4,147,453.87	7.308%
<b>Total</b>	<b>56,749,488.92</b>	<b>100.000%</b>

Footnotes: 2,3,4

### Compliance Overview

Status	Compliant
As of	06/30/2020



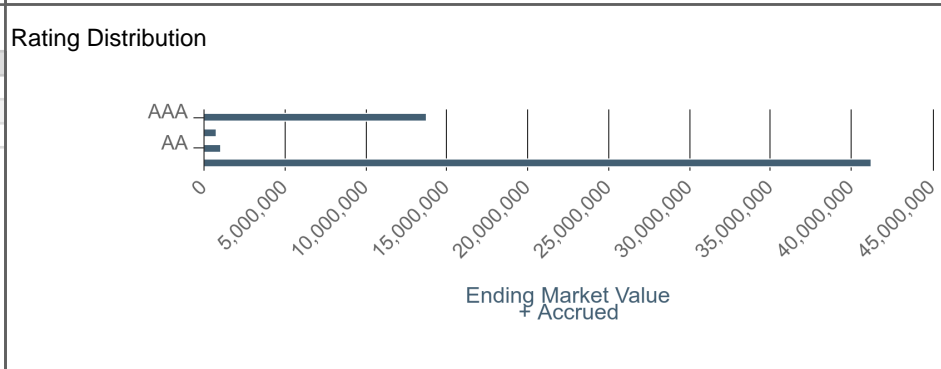
### Activity Summary

	<i>Portfolio</i>
Beginning Book Value	61,579,751.28
Purchases	1,899,138.47
Sales	-6,217,941.36
Net Amortization/Accretion Income	-8,006.79
Change In Cash	0.00
Net Realized Gain/Loss	13,296.86
Ending Book Value	56,266,238.46

Footnote: 4

### Reconciliation Status

Custody Reconciliation Status	Reconciled
Custody Last Reconciled For	07/28/2020
Trading System Last Reconciled For	07/06/2020



### Earnings Summary

	<i>Portfolio</i>
Net Amortization/Accretion Income	-8,006.79
Interest Earned	253,916.76
Net Realized Gain/Loss	13,296.86
Earned Income	259,206.83
Book Yield	1.471

Footnotes: 4,5

1: \* Weighted by: Market Value + Accrued. 2: \* Grouped by: GPA Asset Class. 3: \* Groups Sorted by: GPA Asset Class. 4: \* Weighted by: Ending Market Value + Accrued. 5: \* Formula Column: Earned Income = [Interest Earned]+[Net Amortization/Accretion Income]+[Net Realized Gain/Loss].



# Tualatin City Council Investment Report

04/01/2020 - 06/30/2020

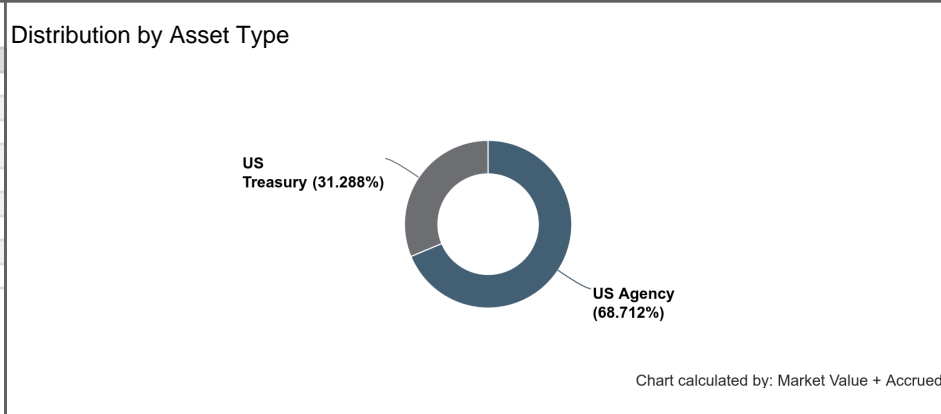
[Return to Table of Contents](#)

# TUAL-Bond Proceed Investments (170698)

Dated: 07/29/2020

Portfolio Characteristics	
	<i>Portfolio</i>
Par Amount	15,690,000.00
Book Value	15,749,540.58
Market Value	16,099,899.15
Accrued Balance	46,874.75
Market Value + Accrued	16,146,773.90
Net Unrealized Gain/Loss	350,358.56
Yield at Cost	1.825
Effective Duration	1.443
Maturity in Years	1.468

Footnote: 1



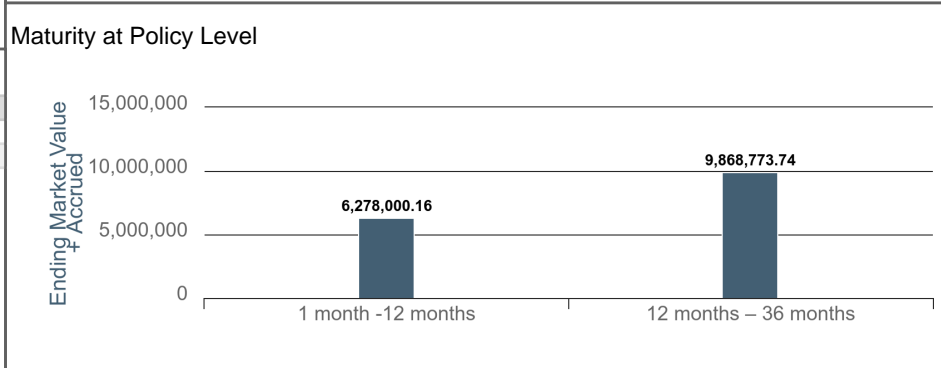
### Asset Allocation at Policy Level

GPA Asset Class	Ending Market Value + Accrued	% of Ending Market Value + Accrued
FFCB	2,927,884.96	18.133%
FHLB	8,166,917.72	50.579%
US Treasury	5,051,971.22	31.288%
<b>Total</b>	<b>16,146,773.90</b>	<b>100.000%</b>

Footnotes: 2,3,4

### Compliance Overview

Status	Compliant
As of	06/30/2020



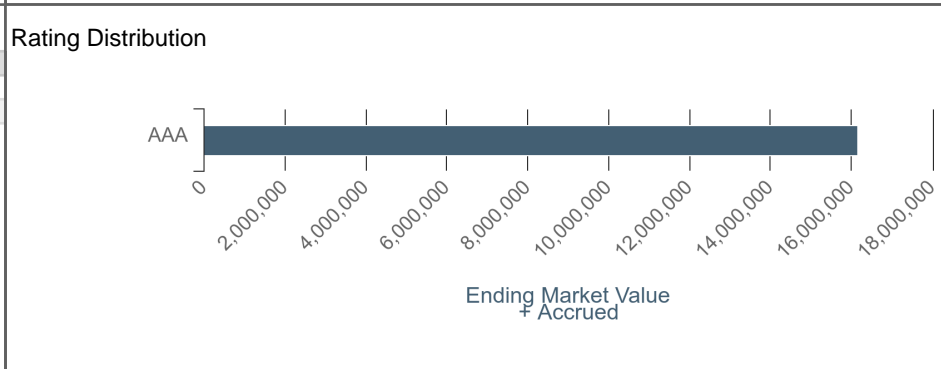
### Activity Summary

	<i>Portfolio</i>
Beginning Book Value	18,009,297.83
Purchases	0.00
Sales	0.00
Net Amortization/Accretion Income	-9,757.25
Change In Cash	0.00
Net Realized Gain/Loss	0.00
Ending Book Value	15,749,540.58

Footnote: 4

### Reconciliation Status

Status	Reconciled
Last Reconciled For	07/28/2020



### Earnings Summary

	<i>Portfolio</i>
Net Amortization/Accretion Income	-9,757.25
Interest Earned	93,032.43
Net Realized Gain/Loss	0.00
Earned Income	83,275.18
Book Yield	1.825

Footnotes: 4,5

1: \* Weighted by: Market Value + Accrued. 2: \* Grouped by: GPA Asset Class. 3: \* Groups Sorted by: GPA Asset Class. 4: \* Weighted by: Ending Market Value + Accrued. 5: \* Formula Column: Earned Income = [Interest Earned]+[Net Amortization/Accretion Income]+[Net Realized Gain/Loss].

June 29, 2020

To the Honorable Mayor and City Council  
City of Tualatin

We are engaged to audit the financial statements of the governmental activities, the business-type activities, each major fund, and the aggregate remaining fund information of the City of Tualatin for the year ended June 30, 2020. Professional standards require that we provide you with the following information related to our audit.

Our Responsibility under U.S. Generally Accepted Auditing Standards

As stated in our engagement letter dated June 29, 2020 our responsibility, as described by professional standards, is to express opinions about whether the financial statements prepared by management with your oversight are fairly presented, in all material respects, in conformity with U.S. generally accepted accounting principles. Our responsibility is to plan and perform the audit to obtain reasonable, but not absolute, assurance that the financial statements are free from material misstatement. Our audit of the financial statements does not relieve you or management of your responsibilities.

Generally accepted accounting principles provide for certain required supplementary information (RSI), which includes the management's discussion and analysis, schedule of the City's proportionate share of the net OPEB liability Oregon Public Employees Retirement System, Retirement Health Insurance Account, schedule of City OPEB contributions Oregon Public Employees Retirement System, Retirement Health Insurance Account, schedule of changes in the City's total OPEB liability and related ratios implicit rate subsidy plan, schedule of City OPEB contributions implicit rate subsidy plan, schedule of the City's proportionate share of the net pension (asset)/liability, and schedule of City pension plan contributions, to supplement the basic financial statements. Our responsibility with respect to the items listed above, and which supplements the basic financial statements, is to apply certain limited procedures in accordance with generally accepted auditing standards. However, this RSI will not be audited and, because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance, we will not express an opinion or provide any assurance on the RSI.

We have been engaged to report on required supplementary information other than the items listed above, and other supplementary information, such as combining schedules and budgetary comparison schedules, which accompany the financial statements. Our responsibility for this supplementary information, as described by professional standards, is to evaluate the presentation of the supplementary information in relation to the financial statements as a whole and to report on whether the supplementary information is fairly stated, in all material respects, in relation to the financial statements as a whole.

We have not been engaged to report on the introductory section or the statistical section, which accompany the financial statements but are not RSI. Our responsibility with respect to this other information in documents containing the audited financial statements and auditor's report does not extend beyond the financial information identified in the report. We have no responsibility for determining whether this other information is properly stated. This other information will not be audited and we will not express an opinion or provide any assurance on it.

As part of our audit, we will consider the internal control of the City of Tualatin. Such considerations will be solely for the purpose of determining our audit procedures and not to provide any assurance concerning such internal control. We are responsible for communicating significant matters related to the audit that are, in our professional judgment, relevant to your responsibilities in overseeing the financial reporting process. However, we are not required to design procedures specifically to identify such matters.

### Planned Scope and Timing of the Audit

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested.

Our audit will include obtaining an understanding of the entity and its environment, including internal control, sufficient to assess the risks of material misstatement of the financial statements and to design the nature, timing, and extent of further audit procedures. Material misstatements may result from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the entity or to acts by management or employees acting on behalf of the entity. We will generally communicate our significant findings at the conclusion of the audit. However, some matters could be communicated sooner, particularly if significant difficulties are encountered during the audit where assistance is needed to overcome the difficulties or if the difficulties may lead to a modified opinion. We will also communicate any internal control related matters that are required to be communicated under professional standards.

Tonya Moffitt is the engagement partner and is responsible for supervising the engagement and signing the report or authorizing another individual to sign it.

This information is intended solely for the use of the Honorable Mayor and City Council and management of the City of Tualatin and is not intended to be, and should not be, used by anyone other than these specified parties.

Very truly yours,



Merina+Co  
Tualatin, Oregon  
*Focused on Your Wants and Understanding Your Needs*

June 29, 2020

To the Board of Commissioners  
Tualatin Development Commission

We are engaged to audit the financial statements of the governmental activities and each major fund of the Tualatin Development Commission, a component unit of the City of Tualatin for the year ended June 30, 2020. Professional standards require that we provide you with the following information related to our audit.

Our Responsibility under U.S. Generally Accepted Auditing Standards

As stated in our engagement letter dated June 29, 2020, our responsibility, as described by professional standards, is to express opinions about whether the financial statements prepared by management with your oversight are fairly presented, in all material respects, in conformity with U.S. generally accepted accounting principles. Our responsibility is to plan and perform the audit to obtain reasonable, but not absolute, assurance that the financial statements are free from material misstatement. Our audit of the financial statements does not relieve you or management of your responsibilities.

Generally accepted accounting principles provide for certain required supplementary information (RSI), which includes the management's discussion and analysis, to supplement the basic financial statements. Our responsibility with respect to the items listed above, and which supplements the basic financial statements, is to apply certain limited procedures in accordance with generally accepted auditing standards. However, this RSI will not be audited and, because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance, we will not express an opinion or provide any assurance on the RSI.

We have been engaged to report on required supplementary information other than the items listed above, and other supplementary data, such as budgetary comparison schedules, which accompany the financial statements. Our responsibility for this supplementary information, as described by professional standards, is to evaluate the presentation of the supplementary information in relation to the financial statements as a whole and to report on whether the supplementary information is fairly stated, in all material respects, in relation to the financial statements as a whole.

We have not been engaged to report on the introductory section, which accompany the financial statements but are not RSI. Our responsibility with respect to this other information in documents containing the audited financial statements and auditor's report does not extend beyond the financial information identified in the report. We have no responsibility for determining whether this other information is properly stated. This other information will not be audited and we will not express an opinion or provide any assurance on it.

As part of our audit, we will consider the internal control of the Tualatin Development Commission. Such considerations will be solely for the purpose of determining our audit procedures and not to provide any assurance concerning such internal control. We are responsible for communicating significant matters related to the audit that are, in our professional judgment, relevant to your responsibilities in overseeing the financial reporting process. However, we are not required to design procedures specifically to identify such matters.

#### Planned Scope and Timing of the Audit

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested.

Our audit will include obtaining an understanding of the entity and its environment, including internal control, sufficient to assess the risks of material misstatement of the financial statements and to design the nature, timing, and extent of further audit procedures. Material misstatements may result from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the entity or to acts by management or employees acting on behalf of the entity. We will generally communicate our significant findings at the conclusion of the audit. However, some matters could be communicated sooner, particularly if significant difficulties are encountered during the audit where assistance is needed to overcome the difficulties or if the difficulties may lead to a modified opinion. We will also communicate any internal control related matters that are required to be communicated under professional standards.

Tonya Moffitt is the engagement partner and is responsible for supervising the engagement and signing the report or authorizing another individual to sign it.

This information is intended solely for the use of the Board of Commissioners and management of the Tualatin Development Commission and is not intended to be, and should not be, used by anyone other than these specified parties.

Very truly yours,



Merina+Co  
Tualatin, Oregon  
*Focused on Your Wants and Understanding Your Needs*



# Fiscal Year 2019 - 2020

## Quarterly Financial Report – 4th Quarter

August 10, 2020



Woohoo the fiscal year is over!!

Oh wait, tomorrow starts another year.



someecards  
user card

# Tonight's Agenda

- Fiscal Year 2019-20 Budget to Actual
- Investment Report
- COVID Impacts
  - Revenue and Expenditure Projections
  - CARES Act Funding



# Fiscal Year 2019-20 Budget to Actual

Fund	Fiscal Year 2018-2019			Fiscal Year 2019-2020		
	Budget	Actual	% of Budget	Budget	Actual	% of Budget
<b>General Fund</b>						
Revenues	\$ 23,032,500	\$ 24,295,961	105.49%	\$ 24,103,870	\$ 23,794,237	98.72%
Expenditures	\$ 22,504,705	\$ 21,511,994	95.59%	\$ 27,401,930	\$ 26,174,067	95.52%
<b>Building Fund</b>						
Revenues	\$ 954,380	\$ 1,361,953	142.71%	\$ 1,049,790	\$ 2,105,444	200.56%
Expenditures	\$ 1,430,370	\$ 1,317,599	92.12%	\$ 2,118,525	\$ 2,087,063	98.51%
<b>Road Utility Fee Fund</b>						
Revenues	\$ 1,892,130	\$ 1,486,365	78.56%	\$ 1,989,730	\$ 1,931,735	97.09%
Expenditures	\$ 1,398,505	\$ 1,397,257	99.91%	\$ 1,880,190	\$ 1,827,207	97.18%
<b>Road Operating Fund</b>						
Revenues	\$ 4,846,140	\$ 4,145,838	85.55%	\$ 4,064,750	\$ 3,306,847	81.35%
Expenditures	\$ 5,084,080	\$ 3,500,102	68.84%	\$ 4,182,310	\$ 2,767,144	66.16%



# Fiscal Year 2019-20 Budget to Actual

Fund	Fiscal Year 2018-2019			Fiscal Year 2019-2020		
	Budget	Actual	% of Budget	Budget	Actual	% of Budget
<b>Core Area Parking Fund</b>						
Revenues	\$ 63,000	\$ 75,256	119.45%	\$ 66,000	\$ 77,309	117.14%
Expenditures	\$ 60,520	\$ 47,025	77.70%	\$ 59,460	\$ 53,272	89.59%
<b>Water Operating Fund</b>						
Revenues	\$ 6,958,795	\$ 7,705,023	110.72%	\$ 7,572,705	\$ 7,288,241	96.24%
Expenditures	\$ 8,043,465	\$ 7,267,994	90.36%	\$ 8,765,375	\$ 7,430,882	84.78%
<b>Sewer Operating Fund</b>						
Revenues	\$ 8,281,195	\$ 8,356,553	100.91%	\$ 8,729,580	\$ 9,044,645	103.61%
Expenditures	\$ 8,923,070	\$ 8,431,459	94.49%	\$ 9,760,225	\$ 9,706,078	99.45%
<b>Storm Drain Operating Fund</b>						
Revenues	\$ 3,060,630	\$ 3,145,513	102.77%	\$ 3,423,530	\$ 3,517,452	102.74%
Expenditures	\$ 2,636,530	\$ 2,231,725	84.65%	\$ 3,687,655	\$ 3,121,728	84.65%



# Quarter End Investment Report



## Tualatin City Council Investment Report

04/01/2020 - 06/30/2020

[Return to Table of Contents](#)

## TUAL\_Total Portfolio (176858)

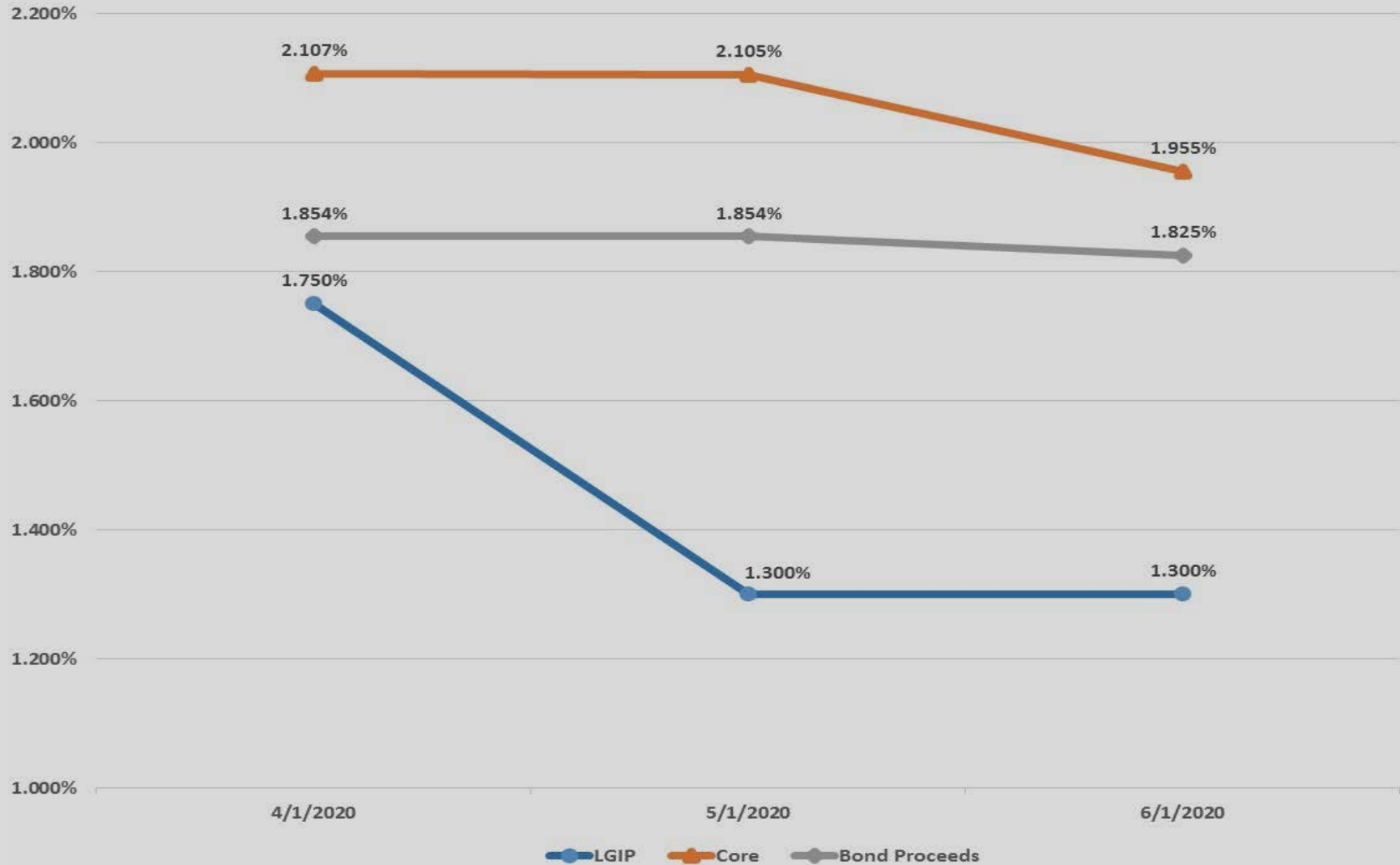
Dated: 07/29/2020

<p><b>Portfolio Characteristics</b></p> <table border="1"> <thead> <tr> <th></th> <th>Portfolio</th> </tr> </thead> <tbody> <tr> <td>Par Amount</td> <td>76,451,658.77</td> </tr> <tr> <td>Book Value</td> <td>76,847,183.01</td> </tr> <tr> <td>Market Value</td> <td>77,403,779.00</td> </tr> <tr> <td>Accrued Balance</td> <td>123,867.79</td> </tr> <tr> <td>Market Value + Accrued</td> <td>77,527,666.79</td> </tr> <tr> <td>Net Unrealized Gain/Loss</td> <td>756,595.99</td> </tr> <tr> <td>Yield at Cost</td> <td>1.497</td> </tr> <tr> <td>Effective Duration</td> <td>0.722</td> </tr> <tr> <td>Maturity in Years</td> <td>0.747</td> </tr> </tbody> </table> <p>Footnote: 1</p>		Portfolio	Par Amount	76,451,658.77	Book Value	76,847,183.01	Market Value	77,403,779.00	Accrued Balance	123,867.79	Market Value + Accrued	77,527,666.79	Net Unrealized Gain/Loss	756,595.99	Yield at Cost	1.497	Effective Duration	0.722	Maturity in Years	0.747	<p><b>Distribution by Asset Type</b></p> <p>Chart calculated by: Market Value + Accrued</p>	<p><b>Asset Allocation at Policy Level</b></p> <table border="1"> <thead> <tr> <th>GPA Asset Class</th> <th>Ending Market Value + Accrued</th> <th>% of Ending Market Value + Accrued</th> </tr> </thead> <tbody> <tr> <td>Bank Deposit</td> <td>2,654,521.77</td> <td>3.424%</td> </tr> <tr> <td>Corporate</td> <td>1,028,833.69</td> <td>1.327%</td> </tr> <tr> <td>FAMC</td> <td>249,619.56</td> <td>0.322%</td> </tr> <tr> <td>FFCB</td> <td>6,050,010.88</td> <td>7.804%</td> </tr> <tr> <td>FHLB</td> <td>13,389,698.14</td> <td>17.271%</td> </tr> <tr> <td>FNMA</td> <td>500,274.11</td> <td>0.645%</td> </tr> <tr> <td>Municipal</td> <td>1,288,146.54</td> <td>1.662%</td> </tr> <tr> <td>Pooled Funds</td> <td>43,167,137.00</td> <td>55.680%</td> </tr> <tr> <td>US Treasury</td> <td>9,199,425.10</td> <td>11.866%</td> </tr> <tr> <td><b>Total</b></td> <td><b>77,527,666.79</b></td> <td><b>100.000%</b></td> </tr> </tbody> </table> <p>Footnotes: 2,3,4</p>	GPA Asset Class	Ending Market Value + Accrued	% of Ending Market Value + Accrued	Bank Deposit	2,654,521.77	3.424%	Corporate	1,028,833.69	1.327%	FAMC	249,619.56	0.322%	FFCB	6,050,010.88	7.804%	FHLB	13,389,698.14	17.271%	FNMA	500,274.11	0.645%	Municipal	1,288,146.54	1.662%	Pooled Funds	43,167,137.00	55.680%	US Treasury	9,199,425.10	11.866%	<b>Total</b>	<b>77,527,666.79</b>	<b>100.000%</b>
	Portfolio																																																						
Par Amount	76,451,658.77																																																						
Book Value	76,847,183.01																																																						
Market Value	77,403,779.00																																																						
Accrued Balance	123,867.79																																																						
Market Value + Accrued	77,527,666.79																																																						
Net Unrealized Gain/Loss	756,595.99																																																						
Yield at Cost	1.497																																																						
Effective Duration	0.722																																																						
Maturity in Years	0.747																																																						
GPA Asset Class	Ending Market Value + Accrued	% of Ending Market Value + Accrued																																																					
Bank Deposit	2,654,521.77	3.424%																																																					
Corporate	1,028,833.69	1.327%																																																					
FAMC	249,619.56	0.322%																																																					
FFCB	6,050,010.88	7.804%																																																					
FHLB	13,389,698.14	17.271%																																																					
FNMA	500,274.11	0.645%																																																					
Municipal	1,288,146.54	1.662%																																																					
Pooled Funds	43,167,137.00	55.680%																																																					
US Treasury	9,199,425.10	11.866%																																																					
<b>Total</b>	<b>77,527,666.79</b>	<b>100.000%</b>																																																					
<p><b>Compliance Overview</b></p> <table border="1"> <tbody> <tr> <td>Status</td> <td>Non-Compliant</td> </tr> <tr> <td>As of</td> <td>06/30/2020</td> </tr> <tr> <td>Violations</td> <td>1</td> </tr> </tbody> </table>	Status	Non-Compliant	As of	06/30/2020	Violations	1	<p><b>Maturity at Policy Level</b></p>	<p><b>Activity Summary</b></p> <table border="1"> <thead> <tr> <th></th> <th>Portfolio</th> </tr> </thead> <tbody> <tr> <td>Beginning Book Value</td> <td>82,468,544.33</td> </tr> <tr> <td>Purchases</td> <td>4,187,805.58</td> </tr> <tr> <td>Sales</td> <td>-6,754,699.72</td> </tr> <tr> <td>Net Amortization/Accrion Income</td> <td>-17,764.04</td> </tr> <tr> <td>Change In Cash</td> <td>0.00</td> </tr> <tr> <td>Net Realized Gain/Loss</td> <td>13,296.86</td> </tr> <tr> <td>Ending Book Value</td> <td>76,847,183.01</td> </tr> </tbody> </table> <p>Footnote: 4</p>		Portfolio	Beginning Book Value	82,468,544.33	Purchases	4,187,805.58	Sales	-6,754,699.72	Net Amortization/Accrion Income	-17,764.04	Change In Cash	0.00	Net Realized Gain/Loss	13,296.86	Ending Book Value	76,847,183.01																															
Status	Non-Compliant																																																						
As of	06/30/2020																																																						
Violations	1																																																						
	Portfolio																																																						
Beginning Book Value	82,468,544.33																																																						
Purchases	4,187,805.58																																																						
Sales	-6,754,699.72																																																						
Net Amortization/Accrion Income	-17,764.04																																																						
Change In Cash	0.00																																																						
Net Realized Gain/Loss	13,296.86																																																						
Ending Book Value	76,847,183.01																																																						
<p><b>Reconciliation Status</b></p> <table border="1"> <tbody> <tr> <td>Custody Reconciliation Status</td> <td>Reconciled</td> </tr> <tr> <td>Custody Last Reconciled For</td> <td>07/28/2020</td> </tr> <tr> <td>Trading System Last Reconciled For</td> <td>07/06/2020</td> </tr> </tbody> </table>	Custody Reconciliation Status	Reconciled	Custody Last Reconciled For	07/28/2020	Trading System Last Reconciled For	07/06/2020	<p><b>Rating Distribution</b></p>	<p><b>Earnings Summary</b></p> <table border="1"> <thead> <tr> <th></th> <th>Portfolio</th> </tr> </thead> <tbody> <tr> <td>Net Amortization/Accrion Income</td> <td>-17,764.04</td> </tr> <tr> <td>Interest Earned</td> <td>356,971.46</td> </tr> <tr> <td>Net Realized Gain/Loss</td> <td>13,296.86</td> </tr> <tr> <td>Earned Income</td> <td>352,504.28</td> </tr> <tr> <td>Book Yield</td> <td>1.497</td> </tr> </tbody> </table> <p>Footnotes: 4,5</p>		Portfolio	Net Amortization/Accrion Income	-17,764.04	Interest Earned	356,971.46	Net Realized Gain/Loss	13,296.86	Earned Income	352,504.28	Book Yield	1.497																																			
Custody Reconciliation Status	Reconciled																																																						
Custody Last Reconciled For	07/28/2020																																																						
Trading System Last Reconciled For	07/06/2020																																																						
	Portfolio																																																						
Net Amortization/Accrion Income	-17,764.04																																																						
Interest Earned	356,971.46																																																						
Net Realized Gain/Loss	13,296.86																																																						
Earned Income	352,504.28																																																						
Book Yield	1.497																																																						

1: \* Weighted by: Market Value + Accrued. 2: \* Grouped by: GPA Asset Class. 3: \* Groups Sorted by: GPA Asset Class. 4: \* Weighted by: Ending Market Value + Accrued. 5: \* Formula Column: Earned Income = [Interest Earned]+[Net Amortization/Accrion Income]-[Net Realized Gain/Loss].



# Investment Portfolio Performance



# Budget Impact Update



COVID-19 & CITIES:  
MUNICIPAL FISCAL HEALTH



**THANK YOU FOR LISTENING!**



**ANY QUESTIONS?**





City of Tualatin

## CITY OF TUALATIN Staff Report

**TO:** Honorable Mayor and Members of the City Council

**THROUGH:** Sherilyn Lombos, City Manager

**FROM:** Tabitha Boschetti, AICP, Assistant Planner  
Steve Koper, AICP, Planning Manager

**DATE:** August 10, 2020

---

**SUBJECT:**

Consideration of Plan Text Amendment 20-0003 which would modify the Medium Low-Density Residential (RML) zone to allow detached single-family residential dwellings as an outright permitted use

**RECOMMENDATION:**

The Planning Commission (4-3 vote) has recommended that the City Council deny the proposed amendments (File No. PTA 20-0003). Planning Commission comments can be found in Exhibit 7.

**EXECUTIVE SUMMARY:**

**Proposal**

The properties where the proposed amended RML language would be applicable, if approved by City Council, include Tax Map 2S135D, Lots 100, 400, 401, 500, 501, 800, and 900 as highlighted in Figure 1 below. This area is generally bounded by SW Norwood Road to the north, SW Greenhill Lane to the south, SW Boones Ferry Road to the far west, and Interstate 5 to the east.

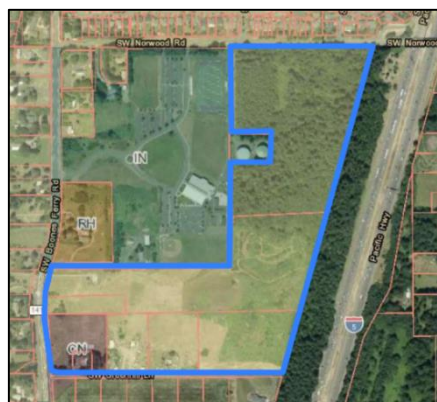


Figure 1 Map of Subject Area

This area consists of approximately 62 acres of land (roughly 58 acres of which is zoned RML, and roughly 4 acres of which is zoned Neighborhood Commercial – CN).

The existing RML zone allows development of attached and multi-family homes at 10 units per net acre, and also allows development of subdivisions for detached single-family dwellings subject to approval of a Conditional Use Permit for a “Small Lot Subdivision.” The proposed amendment is

intended to allow the development of detached single-family dwellings as an outright Permitted use (subject to the clear and objective design standards in TDC Section 33.020), with smaller lot sizes and greater lot coverage, though still at a maximum density of 10 units per acre.

Existing Code	Proposed changes in <u>underline</u>
<p><b>Permitted:</b> Duplex, Townhouse (including on individual lots), Multi-family structure, Manufactured Dwelling Park, Residential Home</p> <p><b>Conditional Use Permit required for:</b></p> <p>Small-Lot Subdivision for single-family dwellings.</p>	<p><b>Permitted:</b> <u>Single-Family Dwellings for Development sites in Basalt Creek area over 15 acres</u>, Duplex, Townhouse (including on individual lots), Multi-family structure, Manufactured Dwelling Park, Residential Home</p> <p><b>Conditional Use Permit required for:</b></p> <p>Small-Lot Subdivision for single-family dwellings.</p>
<p><b>Small Lot Size:</b> Minimum 4,500 square feet</p>	<p><b>Basalt Creek RML Lot Size:</b> <u>Minimum average of 3,000 square feet</u></p>
<p><b>Small Lot Frontage:</b> 50 feet; 30 feet on cul-de-sacs and where not fronting a public street</p>	<p><b>Basalt Creek RML Frontage:</b> <u>Minimum average of 26 feet</u></p>
<p><b>Small Lot Setbacks:</b> To building: 12 feet</p> <p>To rear: 15 feet</p>	<p><b>Basalt Creek Setbacks:</b> To building: <u>10 feet</u></p> <p>To rear: <u>10 feet</u></p>
<p><b>Small Lot Coverage:</b> 45%</p>	<p><b>Basalt Creek RML Coverage:</b> <u>55%</u></p>
<p><b>Small Lot Size:</b> Minimum 4,500 square feet</p>	<p><b>Basalt Creek RML Lot Size:</b> <u>Minimum average of 3,000 square feet</u></p>

The proposed amendments would also amend Comprehensive Plan Chapter 5, Section 5.040(2) to allow single family dwellings – not in conjunction with a Small Lot Subdivision - for projects over 15 acres in size within the Basalt Creek Planning Area.

If approved, the Plan Text Amendment would amend Comprehensive Plan Chapter 5 and Tualatin Development Code Chapter 41. Approval criteria for a Plan Text Amendment, are found in TDC 33.070(5).

### Compliance with Applicable Criteria

The Findings and Analysis (Attachment B) discuss the proposal in relationship to the criteria of: the Oregon Statewide Planning Goals; Oregon Administrative Rules; Metro Code; the Tualatin Comprehensive Plan; and the Tualatin Development Code. Several of the objectives and criteria

are found not to be met and would require the development of additional findings to support a Council decision to approve the proposed amendments.

### **Public Notice**

- Notice of the proposed amendments was provided to the Oregon Department of Land Conservation and Development (DLCD). Notification of the upcoming City Council hearing was made consistent with Tualatin Development Code Section 32.240.

### **OUTCOMES OF DECISION:**

The Council may:

- Accept the Planning Commission's recommendation and deny PTA 20-0003;
  - In this event, the Development Code and Comprehensive Plan would remain unchanged.

### **ALTERNATIVES TO RECOMMENDATION:**

The Council may:

- Approve PTA 20-0003 as written or with amendments;
  - In this event, the Council may direct staff to return with an Ordinance to implement the proposed changes to the Development Code and Comprehensive Plan.
- Continue the public hearing to later hearing date.

### **FINANCIAL IMPLICATIONS:**

None identified at this time.

---

### **ATTACHMENTS:**

- Attachment A – Presentation
- Attachment B – Analysis and Findings
  - Exhibit 1: Applicant Narrative
  - Exhibit 2: Proposed Code Language
  - Exhibit 3: Other Application Materials
  - Exhibit 4: Supplemental Text Changes
  - Exhibit 5: 2019 Housing Needs Analysis
  - Exhibit 6: Agency Comment
  - Exhibit 7: Tualatin Planning Commission Comments Following 7-16-20 Meeting
  - Exhibit 8: Tualatin Housing Strategy (2019)

*Additional attachments following first publication:*

- Exhibit 9: Applicant Memo (Revision) 8-4-20
- Exhibit 10: Public Comments

# Plan Text Amendment for Basalt Creek Medium-Low Residential (RML)

PTA 20-0003

City Council  
August 10, 2020



# AREA OF APPLICATION



# PROPOSAL

The applicant is proposing a Plan Text Amendment to make the following changes that would apply to approximately 58 acres of RML zoned land in the Basalt Creek area (15+ acre sites):

- Allow detached single-family dwellings as an outright Permitted rather than Conditional Use (via the Small Lot Subdivision process).
  - A corresponding amendment to Section 5.040(2) of the Comprehensive Plan is also proposed.
- Reduce lot sizes and lot size averaging.
- Increase permitted lot coverage.



CITY OF

**TUALATIN** OREGON

# PROPOSAL

## Existing Code

**Permitted:** Duplex, Townhouse (including on individual lots), Multi-family structure, Manufactured Dwelling Park, Residential Home

**Conditional Use Permit required for:**  
Small-Lot Subdivision for single-family dwellings

**Small Lot Size:** Minimum 4,500 square feet

**Small Lot Frontage:** 50 feet; 30 feet on cul-de-sacs and where not fronting a public street

**Small Lot Setbacks:** To building: 12 feet  
To rear: 15 feet

**Small Lot Coverage:** 45%

## Proposed changes in underline

**Permitted:** Single-Family Dwellings for Development sites in Basalt Creek area over 15 acres, Duplex, Townhouse (including on individual lots), Multi-family structure, Manufactured Dwelling Park, Residential Home

**Conditional Use Permit required for:**  
Small-Lot Subdivision for single-family dwellings

**Basalt Creek RML Lot Size:** Minimum average of 3,000 square feet

**Basalt Creek RML Frontage:** Minimum average of 26 feet

**Basalt Creek Setbacks:** To building: 10 feet  
To rear: 10 feet

**Basalt Creek RML Coverage:** 55%

# MEDIUM-LOW DENSITY EXAMPLES

- Small Lot Detached Single-Family Subdivisions





# MEDIUM-LOW DENSITY EXAMPLES

- Attached and Multifamily Development



# MEDIUM-LOW DENSITY EXAMPLES



- Attached Development



# 2019 HOUSING NEEDS ANALYSIS

- City needs to plan for 1,014 new dwelling units to accommodate forecasted household growth between 2020 and 2040.
- Planned mix: 40% detached single-family; 15% attached single-family; 45% multifamily.
- Existing mix: 53% detached single-family; 6% attached single-family; 41% multifamily.
- 69 total acres of RML zoned buildable land in Basalt Creek area. Proposal would impact about 58 acres.



# PLANNING COMMISSION RECOMMENDATION

- *The Planning Commission voted 4-3 to recommend denial of PTA 20-0003.*
- *Comments from the Planning Commission are included as Exhibit 7.*



# COUNCIL ACTION

*City Council may:*

- *Deny PTA 20-0003*
- *Approve PTA 20-0003 as written or with further modifications;*
  - *If approved, the Council may direct staff to draft an Ordinance for consideration at a future Council meeting.*
- *Continue the public hearing to later hearing date.*



# QUESTIONS & DISCUSSION





August 10, 2020

## Analysis and Findings

---

Case #:	PTA 20-0003
Project:	Basalt Creek Medium-Low Density Residential (RML) Code Change
Applicant:	AKS Engineering
Property owners:	P3 Properties; Autumn Sunrise, LLC
Additional Parties:	Venture Properties, LLC and Lennar Northwest, Inc.

---

### TABLE OF CONTENTS

I.	INTRODUCTION .....	2
A.	Applicable Criteria.....	2
B.	Project Description .....	2
C.	Site Description and Surrounding Uses .....	3
D.	Public Comments .....	4
E.	Exhibit List .....	4
II.	FINDINGS.....	5
A.	Oregon Statewide Planning Goals .....	5
B.	Oregon Administrative Rules.....	7
C.	Tualatin Comprehensive Plan .....	9
Chapter 5 Residential Planning Growth.....	9	
TDC 5.030- General Objectives .....	9	
TDC 5.040. - Planning District Objectives. ....	10	
D.	Tualatin Development Code.....	11

## I. INTRODUCTION

### A. Applicable Criteria

Applicable Statewide Planning Goals; Divisions 7 and 18 of the Oregon Administrative Rules; applicable Goals and Policies from the City of Tualatin Comprehensive Plan, including Chapter 5 (Residential Planning Growth); applicable Sections of the City of Tualatin Development Code, including Section 33.070 (Plan Amendments).

### B. Project Description

The properties where the proposed amended RML language would be applicable, if approved by City Council, comprise roughly 58 acres and include Tax Map 2S135D, Lots 100, 400, 401, 500, 501, 800, and 900 as highlighted in Figure 1 below. This area is generally bounded by SW Norwood Road to the north, SW Greenhill Lane to the south, SW Boones Ferry Road to the far west, and Interstate 5 to the east



Figure 1: Map of Proposed Subject Area

The existing RML zone allows development of attached and multi-family homes at 10 units per net acre, and also allows development of subdivisions for detached single-family dwellings subject to approval of a Conditional Use Permit for a “Small Lot Subdivision.” The proposed amendment is intended to allow the development of detached single-family dwellings as an outright Permitted use (subject to the clear and objective design standards in TDC Section 33.020), with smaller lot sizes and greater lot coverage, though still at a maximum density of 10 units per acre.

If approved, the Plan Text Amendment would amend Tualatin Comprehensive Plan Chapter 5 and Tualatin Development Code Chapter 41.



Summary of Proposed Code Changes		
Standard	Existing Code	PTA 20-0003
Allowed housing types	<b>Permitted:</b> Duplex, Townhouse (including on individual lots), Multi-family structure, Manufactured Dwelling Park, Residential Home <b>Conditional Use Permit required for:</b> Retirement Housing Facility, <u>Small-Lot Subdivision for single-family dwellings</u>	<b>Permitted:</b> <u>Single-Family Dwellings</u> , Duplex, Townhouse (including on individual lots), Multi-family structure, Manufactured Dwelling Park, Residential Home <b>Conditional Use Permit required for:</b> Retirement Housing Facility
Maximum Density	10 units per acre	10 units per acre
Lot size for single-family dwelling	<i>Small Lot Subdivision:</i> Minimum 4,500 square feet	Minimum average of 3,000 square feet
Lot width for single family lot	<i>Small Lot Subdivision:</i> 50 feet; 30 feet on cul-de-sacs and where not fronting a public street	Minimum average of 26 feet
Front setback	<i>Small Lot Subdivision:</i> Building: 12 feet Garage: 20 feet	Building: 10 feet Garage: 20 feet
Rear setback	<i>Small Lot Subdivision:</i> 15 feet	10 feet
Maximum lot coverage for single-family dwelling	<i>Small Lot Subdivision:</i> 45%	55%

The proposed amendments would also amend Comprehensive Plan Chapter 5, Section 5.040(2) to allow single family dwellings for projects over 15 acres in size within the Basalt Creek Planning Area.

### C. Site Description and Surrounding Uses

The subject territory comprises approximately 62 acres (approximately 58 of which are zoned RML, and an additional 4 of which are zoned Neighborhood Commercial – CN) in the Basalt Creek Planning Area, east of SW Boones Ferry Road and west of I-5. The land is primarily undeveloped, with a three residential homes and agricultural structures near the south end at SW Greenhill Lane. The northern section is wooded, while the southern section is relatively open meadow and agricultural field. The eastern section of the territory generally slopes down westward toward I-5; the southeast corner of this area features more rolling, hummocky land, and the remainder of the south territory slopes gradually down to SW Boones Ferry.

Surrounding uses:

- North: Medium Low-Density Residential (RML)
- Norwood Heights residential subdivision including both detached single-family dwellings and attached homes on individual lots
- Low Density Residential RL
- Tualatin Woods subdivision
- South: Washington County FD-20
- Agriculture and low-density residential
  - Wilsonville Planning Area—Planned as High Tech Employment District
- West: Institutional (IN)
- Horizon Community Church/Christian School campus

- City of Tualatin water towers  
Washington County FD-20/Tualatin Urban Planning Area RH
- Single dwelling. Planned for future multi-family development  
Washington County FD-20/Tualatin Urban Planning Area RML
- Individual dwellings on large lots

East: Washington County---outside UGB

- Interstate 5 Right-of-Way

#### **D. Public Comments**

No written public comments have been received as of the writing of this staff report. Additional public comments received prior to the close of the record at the City Council hearing will be entered into the record at that time. Comments received by phone and prior to the notice period for this land use case have related to future development, and highlighted concerns about tree removal and environmental resource protection and transportation impacts. While these development concerns will be more specifically addressed during future land use review phases for Subdivision or other development, the subject proposal does include changes to the standards that would be applied during a Subdivision. No changes to the standards related to tree protection or transportation have been proposed.

#### **E. Exhibit List**

1. Application Narrative
2. Proposed Text Changes
3. Other Application Materials
4. Supplemental Text Changes
5. 2019 Housing Needs Analysis
6. Agency Comment
7. Tualatin Planning Commission Comments

## **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:**

Public notice pertaining to the proposed changes have been mailed to surrounding property owners and advertised in the newspaper of record, and posted on the City’s website. The applicant held a Neighborhood-Developer meeting on June 10, 2020. The proposal was also discussed at the July 16, 2020 meeting of the Tualatin Planning Commission.

The proposed changes would modify the review process for future phases of development insofar as a Small Lot Subdivision, reviewed through Conditional Use Permit, would no longer be required. Public notice would still be given for a future Subdivision application and the notification processes would not be themselves be modified. The proposed amendments conform to 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.**

[...]

**Finding:**

The proposed amendments have been reviewed pursuant to the City’s established land use planning process and procedures. The proposed amendments conform to Goal 2.

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

**Finding:**

Applicability of Goal 5 to post-acknowledgment plan amendments is governed by OAR 660-023-0250. The proposed amendments do not modify the acknowledged Goal 5 resource list, or a policy that addresses specific requirements of Goal 5. The proposed amendments do not allow uses that would conflict with a particular Goal 5 resource site on an acknowledged resource list. The impact of a specific proposed development would be reviewed by Clean Water Services for potential natural resource impacts as part of that future land use application. The proposed amendments conform to Goal 5.

#### **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 (SWC)

coordinates storm water management, water quality and stream enhancement projects throughout the city. Future development will still need to comply with these state, national and regional regulations and protections for air, water and land resources. The proposed amendments conform to Goal 6.

### **Goal 7 – Areas Subject to Natural Disasters and Hazards**

#### **Finding:**

The proposed amendments do not affect policies associated with Goal 7 established by the Comprehensive Plan. Approval of the proposed amendments will not eliminate the requirement for future development to meet the requirements of the Chapters 70 and 72 of the Tualatin Development Code. The proposed amendments conform to Goal 7.

### **Goal 10 – Housing**

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

#### **Finding:**

The City of Tualatin completed a Buildable Lands Inventory and Housing Needs Analysis in 2019 as part of the City's ongoing efforts to improve local housing policies and development regulations to create a broader range of housing responsive to the region's needs and fully responsive to the charge to provide needed housing presented by Goal 10. The City Council accepted the Housing Needs Analysis and Housing Strategy Analysis through Resolution No. 5479-19, on December 9, 2019.

The 2019 Housing Needs Analysis acknowledged a need for a broader range of housing types at a wider range of price points than the current housing stock provides. The Housing Needs Analysis likewise emphasized the need to meet the requirements of House Bill 2001 to require additional missing middle housing types such as duplexes, triplexes, quad-plexes, and townhomes, all of which the RML zone allows and encourages. Adding single-family homes as a permitted use in addition to those allowed housing types does not, on its own, push Tualatin's code out of future conformance with Goal 10; as the Tualatin Development Code would still permit a range of housing types in the RML zone. To that extent, the proposed amendments conform to Goal 10. However, it has not been demonstrated that this proposal improves how the Tualatin Development Code responds to those identified and established housing needs beyond nominal conformance.

Additionally, the City's Housing Strategy calls for "Recommendation 1.2b: Evaluate opportunities to re-zone Residential Low Density and Residential Medium Low Density residential land for higher-density housing." This proposal does not conform to that recommendation as it does not increase high-density housing. The density of housing would remain unchanged, and the addition of more single family detached will not expand housing types. Similarly, Action 2.1 of the Housing Strategy calls for the City to "encourage development of duplexes, cottage housing, townhomes, row houses, and triplexes and quadplexes in lower-density residential zones," including the RML zone. The proposal would violate this recommendation and does not align with the City's Housing Strategy. The proposals actually discourages these housing types in favor of single family detached. This area is a significant portion of the City's current available land for housing. Not expanding housing choices in this area, and allowing the additional single family detached uses will make it more difficult for the City to be successful in attaining the goals of the Housing Needs Analysis and Housing Strategy in the future.

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

### **Finding:**

The proposed amendments would not change the available residential density planned for this area; therefore, no additional impacts to public facilities and services are anticipated over what the existing development code would allow. Future development would be subject to a land use application that would evaluate the development's impact to public facilities and the transportation system; therefore no amendments to the public facilities plans are necessary in order to accommodate the proposed text and map amendment. The proposed amendments conform to Goal 11.

## **Goal 12 – Transportation**

### **Finding:**

The proposed amendments would not change the available residential density planned for this area; no additional impacts to transportation facilities and services are anticipated. The proposed amendments conform to Goal 12.

## **B. Oregon Administrative Rules**

### **OAR Chapter 660 Division 7 (Metropolitan Housing)**

[...]

#### **660-007-0030: New Construction Mix**

**(1) Jurisdictions other than small developed cities must either designate sufficient buildable land to 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. Factors to be considered in justifying an alternate percentage shall include, but need not be limited to:**

**(a) Metro forecasts of dwelling units by type;**

**(b) Changes in household structure, size, or composition by age;**

**(c) Changes in economic factors impacting demand for single family versus multiple family units; and**

**(d) Changes in price ranges and rent levels relative to income levels.**

**(2) The considerations listed in section (1) of this rule refer to county-level data within the UGB and data on the specific jurisdiction.**

[...]

#### **660-007-0035: Minimum Residential Density Allocation for New Construction**

**The following standards shall apply to those jurisdictions which provide the opportunity for at least 50 percent of new residential units to be attached single family housing or multiple family housing:**

[...]

**(2) Clackamas and Washington Counties, and the cities of Forest Grove, Gladstone, Milwaukie, Oregon City, Troutdale, Tualatin, West Linn and Wilsonville must provide for an overall density of eight or more dwelling units per net buildable acre.**

[...]

**Finding:**

The applicant's proposed amendments will still permit the development of attached housing types, and as such, would continue to provide the opportunity for attached single family housing within the RML zone. Likewise, the proposed amendments do not affect the residential density of the RML zone, which at a maximum of 10 dwelling units per acre, is consistent with the above requirement. Therefore, the proposed amendments are consistent with these requirements.

**660-018-0020: Notice of a Proposed Change to a Comprehensive Plan or Land Use Regulation**

**(1) Before a local government adopts a change to an acknowledged comprehensive plan or a land use regulation, unless circumstances described in OAR 660-018-0022 (Exemptions to Notice Requirements Under OAR 660-018-0020) apply, the local government shall submit the proposed change to the department, including the information described in section (2) of this rule. The local government must submit the proposed change to the director at the department's Salem office at least 35 days before holding the first evidentiary hearing on adoption of the proposed change.**

**(2) The submittal must include applicable forms provided by the department, be in a format acceptable to the department, and include all of the following materials:**

**(a) The text of the proposed change to the comprehensive plan or land use regulation implementing the plan, as provided in section (3) of this rule;**

**(b) If a comprehensive plan map or zoning map is created or altered by the proposed change, a copy of the relevant portion of the map that is created or altered;**

**(c) A brief narrative summary of the proposed change and any supplemental information that the local government believes may be useful to inform the director and members of the public of the effect of the proposed change;**

**(d) The date set for the first evidentiary hearing;**

**(e) The notice or a draft of the notice required under ORS 197.763 (Conduct of local quasi-judicial land use hearings) regarding a quasi-judicial land use hearing, if applicable; and**

**(f) Any staff report on the proposed change or information that describes when the staff report will be available and how a copy may be obtained.**

**(3) The proposed text submitted to comply with subsection (2)(a) of this rule must include all of the proposed wording to be added to or deleted from the acknowledged plan or land use regulations. A general description of the proposal or its purpose, by itself, is not sufficient. For map changes, the material submitted to comply with Subsection (2)(b) must include a graphic depiction of the change; a legal description, tax account number, address or similar general description, by itself, is not sufficient. If a goal exception is proposed, the submittal must include the proposed wording of the exception.**

**(4) If a local government proposes a change to an acknowledged comprehensive plan or a land use regulation solely for the purpose of conforming the plan and regulations to new requirements in a**

land use statute, statewide land use planning goal, or a rule implementing the statutes or goals, the local government may adopt such a change without holding a public hearing, notwithstanding contrary provisions of state and local law, provided:

(a) The local government provides notice to the department of the proposed change identifying it as a change described under this section, and includes the materials described in section (2) of this rule, 35 days before the proposed change is adopted by the local government, and

(b) The department confirms in writing prior to the adoption of the change that the only effect of the proposed change is to conform the comprehensive plan or the land use regulations to the new requirements.

(5) For purposes of computation of time for the 35-day notice under this rule and OAR 660-018-0035 (Department Participation)(1)(c), the proposed change is considered to have been “submitted” on the day that paper copies or an electronic file of the applicable notice forms and other documents required by section (2) this rule are received or, if mailed, on the date of mailing. The materials must be mailed to or received by the department at its Salem office.

**Finding:**

Notice of a proposed Post-Acknowledgement Plan Amendment was submitted to the Department of Land Conservation and Development (DLCD) via the PAPA Online portal on June 24, 2020, 47 days before the scheduled hearing.

**C. Tualatin Comprehensive Plan  
Chapter 5 Residential Planning Growth**

**TDC 5.030- General Objectives**

**(1) Provide for the housing needs of existing and future City residents.**

**(2) Provide housing opportunities for residents with varied income levels and tastes that are esthetically and functionally compatible with the existing community housing stock.**

[...]

**Finding:**

The housing needs of existing and future City residents have most recently been evaluated in Tualatin’s Housing Needs Analysis (HNA) (2019) (Exhibit 5). The City Council accepted the Housing Needs Analysis and Housing Strategy Analysis through Resolution No. 5479-19, on December 9, 2019.

The HNA identified housing affordability as a growing challenge, and identified actions to better accommodate growing needs than present policy, including greater allowances for a range of housing types include single-family attached and multi-family housing, investing in affordable housing, and finding ways to encourage development of multi-family housing (Exhibit 5, Page 87). The existing RML zone allows housing types such as attached single-family housing and multi-family housing types; detached single-family dwellings are a Conditional Use, allowed in conjunction with a Small Lot Subdivision.

The proposed amendments would eliminate the requirement for a Conditional Use Permit and the limitation that detached single family dwellings be located within a Small Lot Subdivision, streamlining the process for development of this housing type. The proposed amendments would be applied to

roughly 58 acres in the Basalt Creek Area, out of a total of 69 buildable acres of RML zoned land (Exhibit 5, Page IX). The proposed amendments would also amend the Comprehensive Plan Section 5.040(2) to add detached single family housing as an outright Permitted use on sites over 15 acres. In summary, the 2019 HNA identified: (1) that the City has a surplus of land zoned for detached single-family housing; (2) the City has a need to plan to increase its share of non-detached single family dwelling types. The proposed amendments do not address this need, which would provide for the housing needs of existing and future City residents. To the extent that the City has a surplus of land zoned for detached-single family housing, and generally an existing mix of housing types – 94 percent detached single-family and multifamily – the proposed amendments do not themselves provide housing opportunities for residential with varied income levels. Therefore, these objectives are not met.

Additionally, the City’s Housing Strategy calls for “Recommendation 1.2b: Evaluate opportunities to re-zone Residential Low Density and Residential Medium Low Density residential land for higher-density housing.” This proposal does not conform to that recommendation as it does not increase high-density housing. The density of housing would remain unchanged, and the addition of more single family detached will not expand housing types. Similarly, Action 2.1 of the Housing Strategy calls for the City to “encourage development of duplexes, cottage housing, townhomes, row houses, and triplexes and quadplexes in lower-density residential zones,” including the RML zone. The proposal would violate this recommendation and does not align with the City’s Housing Strategy. The proposals actually discourages these housing types in favor of single family detached. This area is a significant portion of the City’s current available land for housing. Not expanding housing choices in this area, and allowing the additional single family detached uses will make it more difficult for the City to be successful in attaining the goals of the Housing Needs Analysis and Housing Strategy in the future.

**(12) Encourage the development of attached housing in accordance with the RML Planning District in the area of the Norwood Expressway/Boones Ferry Road intersection.**

[...]

**Finding:**

The subject area is within the RML zone (Planning District) in the area of what was then known as the Norwood Expressway/Boones Ferry Road. The proposed amendments would effectively reduce an existing barrier to the development of detached single family housing to roughly 58 acres of the 69 acres of buildable land zoned RML in the Basalt Creek Area, and thus do not encourage the development of attached housing in accordance with the RML Planning District in this area. Therefore, this objective is not met.

**TDC 5.040. - Planning District Objectives.**

[....]

**(2) *Medium-Low Density Residential Planning District (RML).* To provide areas of the City suitable for commonwall dwellings such as condominiums, townhouses, duplexes, triplexes, and other multi-family dwellings. Condominiums and small lot subdivisions may be allowed by conditional use permit. Owner occupancy of dwelling units shall be encouraged. Parks for manufactured dwellings shall be allowed in those portions of the district designated on the Plan Map. Except for retirement housing and nursing**



and convalescent homes which shall not exceed 15 dwelling units per net acre and manufactured dwelling parks with single-wide manufactured dwellings which shall not exceed 12 dwelling units per net acre, the maximum density of any residential use shall not exceed ten dwelling units per net acre. The raising of agricultural animals and the construction of agricultural structures may be allowed by conditional use permit in those portions of the District designated on the Plan Map.  
[...]

**Finding:**

The above objective states that the RML zone is intended to provide areas of the City suitable for attached and multi-family dwellings, with detached single family dwellings within a Small Lot Subdivision allowed by Conditional Use Permit. The applicant's narrative addressing the Comprehensive Plan states that the proposal to allow detached single family dwellings without a Conditional Use Permit for a Small Lot Subdivision is "generally inline" with this objective (Exhibit 1, Page 6), but does not provide any support for this conclusion. The applicant subsequently has proposed (Exhibit 4) to amend the above objective as identified in **bold underline**:

(2) Medium-Low Density Residential Planning District (RML). *To provide areas of the City suitable for commonwall dwellings such as condominiums, townhouses, duplexes, triplexes, and other multi-family dwellings. Condominiums and small lot subdivisions may be allowed by conditional use permit. **Detached housing is permitted for projects over 15 acres in size within the Basalt Creek Planning Area.** Owner occupancy of dwelling units shall be encouraged. Parks for manufactured dwellings shall be allowed in those portions of the district designated on the Plan Map. Except for retirement housing and nursing and convalescent homes which shall not exceed 15 dwelling units per net acre and manufactured dwelling parks with single-wide manufactured dwellings which shall not exceed 12 dwelling units per net acre, the maximum density of any residential use shall not exceed ten dwelling units per net acre. The raising of agricultural animals and the construction of agricultural structures may be allowed by conditional use permit in those portions of the District designated on the Plan Map.*

Clearly amending this objective to conform to the proposed amendments would thus make it in line with the proposal. However, as addressed above under Section 5.030, the proposed amendments do not support the objectives of Tualatin's Residential Planning Growth chapter. Therefore, this objective is not met.

**D. Tualatin Development Code**

**Chapter 33: Applications and Approval Criteria**

**Section 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.

(3) **Procedure Type.**

[...]

- (b) 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.**

[...]

**Finding:**

The proposed text amendments are proposed for a limited number of properties and quasi-judicial in nature and will be processed consistent with the Type IV-A procedures in Chapter 32. A Post-Adoption Plan Amendment notice was filed with DLCD on June 24, 2020, 47 days before the scheduled hearing. Public notice has been mailed on July 6, 2020, 35 days before the scheduled hearing. This criterion is met.

**(5) Approval Criteria.**

- (a) Granting the amendment is in the public interest.**  
**(b) The public interest is best protected by granting the amendment at this time.**

**Finding:**

The applicant states that the proposed text amendment would allow RML-zoned properties within the Basalt Creek area to develop with single-family detached as well as single-family attached dwellings. The applicant further states that the City of Tualatin's Housing Needs Analysis identifies that single-family detached dwellings are needed housing and over 1,000 new dwelling units are required during the period of 2020-2040 and that over 400 of these households are forecast to be located within Basalt Creek. The applicant concludes that the construction of a wide variety of housing types will allow the City to meet its housing goals over the 20-year planning period, and that providing needed housing is in the best interests of the public and preparing for future needs protects the public interest over the long term.

However, while it is accurate that the 2019 HNA concludes that while Tualatin will need to plan for about 1,014 new dwelling units to accommodate forecasted household growth between 2020 and 2040, the HNA also included that in order to meet the need for a broader range of housing types with a wider range of price points, the City would need to increase the amount of single-family attached housing. "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." (Exhibit 5, Page 92). The proposed amendments would impact roughly 58 of the 69 buildable acres of RML zoned land in the Basalt Creek area, which would challenge this goal. Further, while it is accurate that the proposed text amendment would allow development of both single-family attached and detached housing, the amendment itself, which streamlines the review process for detached single-family dwellings, but leaves the review process for attached single-family dwellings as unchanged does not support planning for "more single-family attached" units and is neither in the public interest, nor is the public interest protected by granting the amendment at this time. Therefore, these criteria are not met.

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

**Finding:**

Tualatin Community Plan objectives are addressed in greater depth in Section C above. While the proposed amendments would be able to generally satisfy most objectives insofar as they present a neutral impact on Tualatin's overall function in meeting the stated objectives, the proposed amendments are not in conformity with all applicable objectives with the Tualatin Community Plan.

**(d) The following factors were consciously considered:**

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

**Finding:**

The area immediately south of SW Norwood Road and extending toward SW Greenhill Road is a suburban edge area poised for change following the adoption of the Basalt Creek Concept Plan in 2018. The majority of the subject area is recently annexed territory of the City of Tualatin. A portion of the property to which the proposed amendments would apply, is in process for annexation as of the writing of this staff report.

To the north is a developed residential neighborhood characterized by a mix of detached and attached housing, much of it developed in the 1990's, including duplex and triplex development on individual lots. To the east is I-5, and beyond that to the east are areas outside of the City of Tualatin and beyond the Urban Growth Boundary, with large lot residential development (often on multiple acres) and agricultural uses. To the south, and west of Boones Ferry, is additional large-lot residential development outside of city limits. To the immediate west and north of the site is a church and school campus. There is additional zoning potential along SW Boones Ferry for multifamily housing, although the property within that zone is currently developed with a detached single-family residence.

Based on the surrounding characteristics of the areas of the City, both detached and attached housing types would be functionally and visibly consistent with the characteristics of the existing development. This criterion is met.

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

**Finding:**

This area has already been zoned for residential uses at ten units per acre. The suitability for infrastructure service has been recently analyzed with the Basalt Creek Master Plan and the impacts are not anticipated to change as a result of the proposed change of allowed housing type. This criterion is met.

**(iii) Trends in land improvement and development;**

**Finding:**

Tualatin's Housing Needs Analysis (2019) is the most recent and applicable evaluation of trends in land improvement and development with regard to housing. The applicant has correctly observed that housing is needed. The applicant is seeking to provide single-family housing types without the need for a Conditional Use Permit in addition to the housing types currently allowed as outright Permitted. The 2019 HNA identifies the need for more attached single-family housing in the City, and for the City to take steps to increase its overall relative share of attached housing as compared to other housing types, namely detached single-family. As mentioned previously the proposed amendments would be applicable to roughly 58 acres of the total 69 acres of buildable land zoned RML in the Basalt Creek area. As such, the proposed amendments do not support Tualatin's trends in land improvement and development. This criterion is not met.

**(iv) Property values;**

**Finding:**

The applicant has not provided specific findings in support of this objective. It does not appear that allowing detached single-family dwellings as an outright Permitted rather than Conditional Use would impact property values in Tualatin. This objective 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 applicant has not provided specific findings in support of this objective. This objective it not 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:**

Natural resources are identified and protected through applicable regulations of the TDC, and protection and conservation of said resources is implemented by the City, as well as Clean Water Services. No amendments are proposed that would explicitly affect the protection and conservation of natural resources. Future impacts to natural resources represented by development would be evaluated as part of a future land use application. This criterion is met.

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

**[...]**

**Finding:**

The development of single-family homes as opposed to attached housing types does not pose a specific health, safety, or aesthetic impact. Residential aesthetics vary just as much between attached housing types as between detached housing types. 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 proposed change does not affect the maximum residential density and as such, would not pose a major difference in projected school attendance from future families in this area as compared with the existing code language. The properties are within the Sherwood School District, which has been notified of the proposed Plan Text Amendment. 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 proposed change does not affect the maximum residential density and as such, would not be predicted to impact the number of trips necessarily associated with future development as compared with existing code allowances. More specific transportation impacts of future development will be evaluated with a future land use application. This criterion is met.

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

**Finding:**

The proposed amendments will remain consistent with Titles 1-14 of the Metro Urban Growth Management Functional Plan as addressed below:

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

The proposed amendments would not change the maximum residential density, and as such, would not impact the overall housing capacity.

***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.

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

This Title 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***

This Title is not applicable.

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

This Title pertains to Tualatin’s obligation to meet the affordable housing needs of households with incomes between 0 and 50 percent of the regional median income. This change neither moves Tualatin toward meeting affordable production goals, nor does it necessarily move it away from those goals.

***Title 8 – Compliance Procedures:*** ensures all cities & counties are equitably held to the same standards  
Tualatin continues to partner with state and regional authorities to comply with the Functional Plan.

***Title 9 – Performance Measures:*** repealed

***Title 10 – Definitions***

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

The proposed amendments would apply to land that is within the UGB and within the City of Tualatin or its Urban Planning Area (UPA); therefore amendments do not affect planning areas outside of the UGB.

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

The change in permitted housing types, lot size, and lot coverage would not influence the neighborhood access goals of Title 12.

***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

Natural resources are addressed in Chapter 72 of the Tualatin Development Code and supported by the City’s partnership with Clean Water Services. No amendments to this chapter are proposed under this application.

***Title 14 – Urban Growth Boundary:*** prescribes criteria and procedures for amendments to the UGB  
No amendments are proposed to the UGB under this application.

- (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 9-4), and E/E for the rest of the 2040 Design Types in the City's planning area.**

**Finding:**

The proposed changes do not include a change to the allowed residential density; as such, no transportation impact over and above what is allowed under the existing code is anticipated. 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:**

Future structural development on the site will require approval of a land use application, at which time these issues will be addressed in greater detail. The change in allowed housing type, lot size, and coverage will not directly change the ability to serve the site with needed utilities. This criterion 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. TDC Map 9-1 illustrates this area.**

**Finding:**

The majority of the subject area is currently within the City of Tualatin. One parcel, Lot 100, is currently under review for annexation by File No. ANN 20-0003. The applicant has not proposed a development agreement.

---

# Land Use Application for a Development Code Text Amendment

<b>Submitted to:</b>	City of Tualatin – Planning Division 18800 SW Martinazzi Avenue Tualatin, OR 97062	
<b>Applicants:</b>	Venture Properties, Inc. 4230 Galewood Street Suite 100 Lake Oswego, OR 97035	Lennar Northwest, Inc. 11807 NE 99 <sup>th</sup> Street Suite 1170 Vancouver, WA 98682
<b>Property Owners:</b>	Tax Lots 400, 401, 500, 501, 600, 800, and 900: Autumn Sunrise, LLC 485 S State Street Lake Oswego, OR 97034	
	Tax Lot 100: P3 Properties LLC PO Box 691 White Salmon, WA 98672	
<b>Applicant's Consultant:</b>	AKS Engineering & Forestry, LLC 12965 SW Herman Road, Suite 100 Tualatin, OR 97062	
	Contact:	Mimi Doukas, AICP, RLA
	Email:	mimid@aks-eng.com
	Phone:	(503) 563-6151
<b>Site Location:</b>	South of SW Norwood Road, east of SW Boones Ferry Road, and north of SW Greenhill Lane, Tualatin, OR	
<b>Washington County Assessor's Map:</b>	Map 2S 1 35D, Tax Lots 100, 400, 401, 500, 501, 600, 800, and 900.	
<b>Site Size:</b>	A development code amendment affecting eight lots totaling ±61.96 acres: ±23.93 acres (Lot 100), ±4.17 acres (Lots 500 and 501) and ±33.86 acres (Lots 400, 401, 600, 800, and 900).	
<b>Land Use District:</b>	Medium-Low Density Residential (RML)	



---

## **I. Executive Summary**

Lennar Northwest, Inc. and Venture Properties, Inc. (Applicants) are submitting this application for a Text Amendment to the Tualatin Development Code (TDC) to allow as a permitted use within the Medium-Low Density Residential (RML) zone of the Basalt Creek Planning Area (BCPA) projects over 15 acres containing single-family detached homes on lots averaging 3,000 square feet. This amendment will create a provision for single-family housing that meets the density requirements adopted within the Basalt Creek Concept Plan for the BCPA without adjusting the target densities for the RML District. The full language of the draft Text Amendment is included in Exhibit B.

This amendment will affect approximately 62 acres comprised of Tax Lots 400, 401, 500, 501, 600, 800, and 900 of Washington County Assessor's Map 2S 1 35D, which were recently annexed to the City of Tualatin through annexation petition ANN-19-0002, and Tax Lot 100, currently within unincorporated Washington County but inside the City of Tualatin Urban Growth Boundary (UGB). Tax Lot 100 is zoned Future Development 20-Acre (FD-20) and will be zoned RML upon its annexation to the City of Tualatin. To provide needed housing, the applicants plan to submit residential subdivision applications in the future for these properties.

While the TDC permits only attached housing units of apartments, duplexes, and triplexes, and for-sale townhomes in the RML zone, the allowed density range of 8-10 dwelling units per net acre is ideal for small-lot, single-family development, especially in large developments with varied lots and land uses. The City currently offers a Small Lot Subdivision process through a Conditional Use Permit; however, this process is highly discretionary, is of limited use since it is only permitted for tree preservation (per TDC 35.410.1.b), and the development standards do not allow lot variability.

Lot size averaging throughout a subdivision allows more diversity in lot size and housing style to meet the varied needs of homebuyers and give neighborhoods character. The current Small Lot Subdivision development standards do not allow for lot size averaging and instead require a minimum lot size of 4,500 square feet, effectively preventing developments from meeting the maximum allowed density (at 10 units per acre, lots will average to 4,356 square feet). Further, these standards allow only 45 percent building coverage, do not allow for lot widths under 50 feet or 30 feet on a cul-de-sac bulb, and require greater corner setbacks from both street-facing lot lines of corner lots. Wide lots, as required by the Small Lot Subdivision code, increase lot costs with little benefit for the homebuyer. Small-lot subdivisions also typically require greater building coverage in order to accommodate single-family detached houses.

According to the City's 2019 Housing Needs Analysis (HNA), the City of Tualatin currently provides a healthy mix of single-family and multi-family housing, with a stock of approximately 53 percent single-family detached and 41 percent multi-family units. Notably, the City's HNA demonstrates that the City provides a larger share of multi-family housing than Washington County and the Portland region as a whole and more single-family attached housing than the regional average. Only six percent of housing stock within the City is provided as single-family attached housing. Attached housing has been viewed as a more affordable option for home ownership; however, small-lot detached homes can reach the same price range as attached homes and are in greater demand by the market.

For RML zoning to be effective, a mixture of feasible housing alternatives must be provided. Broadening the RML zone to include small-lot single-family homes will provide a viable medium-density alternative with lower home prices. Attached housing projects perform better on smaller development sites adjacent

---

to urban services. The two projects planned by the applicants in the BCPA contain approximately 58 acres of RML land which could accommodate 329 to 412 dwelling units at current densities. This scale of townhouse project cannot be found even in light rail districts around the Metro region and the applicant's project areas are not served by walkable services that are desired by attached housing buyers.

The proposed text amendment maintains the existing allowed uses and overall project densities established in the RML zone while allowing for lot-size averaging, opening opportunities for small-lot single-family homes on large project sites, as well as amenities such as shared open space. The proposed amendments contribute to the flexibility and variety of housing available within the City while meeting the city's projected housing density needs and avoiding repeated lots and housing types.

The Text Amendment proposed is consistent with relevant goals and policies within the City of Tualatin's Comprehensive Plan and HNA. The proposal satisfies the applicable approval criteria for Text Amendments outlined within the Tualatin Development Code. This application includes the City application forms and written materials necessary for City staff to review and determine compliance with the applicable approval criteria. The evidence is substantial and supports the City's approval of the application.

## **II. Site Description/Setting**

The potential project areas affected by this application for a text amendment to the Tualatin Development Code comprises a total of ±61.96 acres located at the southernmost extent of the City's UGB. An area totaling ±33.86 acres, comprised of Tax Lots 400, 401, 600, 800, and 900, has been annexed into the City of Tualatin and is now zoned RML. Lot 100, at ±23.93 acres in size, is located within the UGB and will be designated RML upon its annexation. Lots 500 and 501 are zoned Neighborhood Commercial but are part of the Autumn Sunrise residential project. The potential project sites lie east of SW Boones Ferry Road, west of Interstate 5, north of SW Greenhill Lane, and south of SW Norwood Road in the northeastern corner of the BCPA.

Tax Lots 100, 401, and 900 are currently vacant and undeveloped. Tax Lots 400, 500, 501, 600, and 800 are partially developed with single-family residences. These parcels represent 100 percent of the area affected by these proposed amendments.

## **III. Applicable Review Criteria**

### **TUALATIN DEVELOPMENT CODE (TUALATIN COMMUNITY PLAN)**

#### **Chapter 5 – Residential Planning Growth**

##### **TDC 5.010. - Background.**

- (1) The most controversial issue discussed during the preparation of the Plan was housing, particularly the issues of housing type and density. Over the last two years, the community has seen extremely rapid apartment growth in the City that has created considerable negative feelings toward additional apartment development. These feelings are related to the community's concern about the esthetic quality of existing apartment development; concern about a large transient population within the City; concern about the effect of apartments on traffic congestion; and a concern about the effect apartment development has on single-family neighborhoods and the general livability of the City.

- (2) Community feelings have coalesced into an increasing demand for fewer multi-family housing units and even demand for a moratorium on additional apartment development. At the same time community concern has increased over the amount and type of apartment construction, interest groups such as the 1000 Friends of Oregon have shown concern for any action that would narrow the housing opportunities available to the region's residents. Statewide Planning Goal 10, the Housing Goal, states that "plans shall encourage the availability of adequate numbers of housing units at price ranges and rent levels which are commensurate with the financial capabilities of Oregon households and allow for flexibility of housing location, type and density."

**Response:** The proposed change in development code (Exhibit B) will encourage the development of additional housing types within the RML zone that are consistent with neighboring areas and at densities encouraged by the TDC and the City's HNA.

- (3)
- (a) To meet the community's concern for the increasing amount of multi-family housing and to meet the State Housing Goal, the Plan proposes five residential land use categories, one single-family and four multi-family. For background, the following figures show single-family to multi-family proportions in the region as well as the City of Tualatin:

	Single-Family % of Dwelling Units	Multi-Family % of Dwelling Units
Portland Metro Region*		
Existing	72	28
Year 2000	65	35
City of Tualatin		
Existing – Built (City Limits)	55	45
Existing – Potential (City Limits)	40	60
Year 2000 (City Limits and Urban Grown Boundary)	68	32

- (b) It is clearly shown in the above numbers that the City is more than accommodating the region's share of multi-family housing. The long-term objective of the Plan is to produce housing units that meet the regional projections as well as the community's desire for multi-family units that minimize any adverse impacts within the City's single-family neighborhoods. This has been accomplished by reviewing various housing density alternatives and other technical data that are defined in the Phase I—Technical Memoranda. This analysis indicated that the amount of land available for multi-family housing is nearing depletion, and the present amount of land planned and zoned for this type of housing is minimal compared to demand. As evidenced by the regional figures, there will be an increasing need for multi-family residential units because of the national trend toward smaller families, more single-parent families, and the sharply rising costs of new single-family residential construction.
- (4) To accommodate this need for additional multi-family land, the Plan proposes four medium-to-high density housing categories, as follows:

	Plan Density
RML – Residential Medium-Low Density	6-10 dwelling units per acre

**Response:** The proposed text amendment will permit the opportunity for housing units that meet the City's present and future housing needs at a density appropriate for the location. The

---

density provisions of the zone remain the same but can now be met with single-family detached homes and related lot development standards.

- (5) The multi-family areas described on the Plan Map referred to in TDC Chapter 9 indicate that, wherever possible, multi-family areas were located close to the City's commercial core area where supporting commercial and transportation services are readily available. The multi-family areas are also located close to the City's arterial and collector street system and have good access to the City's park and open space system.

**Response:** The Plan Map indicates that the section of the BCPA affected by the proposed text amendment is not located near the City's commercial core area nor is the location particularly near City parks or well-served transit routes. The distance from amenities limits the value of attached and multi-family development at this location, especially when developed to the maximum of 10 dwelling units per acre required by the RML zone. Single-family detached housing, as proposed by this text amendment, is an effective use of this location.

**TDC 5.020. - Assumptions.**

The following are general objectives used to guide the development of the residential housing element of the Plan. They describe the Plan's intent to:

- (1) Provide for the housing needs of existing and future City residents.
- (2) Provide housing opportunities for residents with varied income levels and tastes that are esthetically and functionally compatible with the existing community housing stock.

**Response:** The proposed text amendment will help meet the housing needs of existing and future City residents in a way that is functionally compatible with the City's existing housing stock, neighboring developments, and the density goals of the RML District. The proposal aims to amend City code in order to provide additional housing types that are functionally and characteristically similar to neighboring housing developments within the RML District.

- (4) Locate higher density development where it is convenient to the City's commercial core, near schools, adjacent to arterial and collector streets and, as much as possible, in areas with existing multi-family housing and provide residential opportunities in selected commercial areas through the Mixed Use Commercial Overlay District.

**Response:** The areas of RML-zoned properties affected by the proposed text amendment are not conveniently located near the City's commercial core; they are two miles to Tualatin-Sherwood Road and one mile to Argyle Square, which is an auto-oriented retail center. The project area is located near convenient arterial streets and schools but is not an ideal location for multi-family housing. The proposed text will allow the construction of single-family detached housing that is in character with surrounding RML-zoned properties and maintains the minimum and maximum densities required by TDC Chapter 41.

**TDC 5.030. - General Objectives.**

The following are general objectives used to guide the development of the residential housing element of the Plan. They describe the Plan's intent to:

- (1) Provide for the housing needs of existing and future City residents.

- 
- (2) Provide housing opportunities for residents with varied income levels and tastes that are esthetically and functionally compatible with the existing community housing stock.

**Response:** The proposed text amendment will help meet the housing needs of existing and future City residents in a way that is functionally compatible with the City's existing housing stock, neighboring developments, and the density goals of the RML District. The proposal aims to amend City code in order to provide additional housing types that are functionally and characteristically similar to neighboring housing developments within the RML District.

- (4) Locate higher density development where it is convenient to the City's commercial core, near schools, adjacent to arterial and collector streets and, as much as possible, in areas with existing multi-family housing and provide residential opportunities in selected commercial areas through the Mixed Use Commercial Overlay District.

**Response:** The areas of RML-zoned properties affected by the proposed text amendment are not conveniently located near the City's commercial core; they are two miles to Tualatin-Sherwood Road and one mile to Argyle Square, which is an auto-oriented retail center. The project area is located near convenient arterial streets and schools but is not an ideal location for multi-family housing. The proposed text will allow the construction of single-family detached housing that is in character with surrounding RML-zoned properties and maintains the minimum and maximum densities required by TDC Chapter 41.

#### TDC 5.040. - Planning District Objectives.

This section describes the purpose of each residential planning district.

- (2) *Medium-Low Density Residential Planning District (RML).* To provide areas of the City suitable for commonwall dwellings such as condominiums, townhouses, duplexes, triplexes, and other multi-family dwellings. Condominiums and small lot subdivisions may be allowed by conditional use permit. Owner occupancy of dwelling units shall be encouraged. Parks for manufactured dwellings shall be allowed in those portions of the district designated on the Plan Map. Except for retirement housing and nursing and convalescent homes which shall not exceed 15 dwelling units per net acre and manufactured dwelling parks with single-wide manufactured dwellings which shall not exceed 12 dwelling units per net acre, the maximum density of any residential use shall not exceed ten dwelling units per net acre. The raising of agricultural animals and the construction of agricultural structures may be allowed by conditional use permit in those portions of the District designated on the Plan Map.

**Response:** The text amendment is generally in line with the purpose of the RML zone. While the purpose statement provides for small-lot single-family homes under a conditional use permit, the Applicants propose to make this a permitted use for projects that are larger than 15 acres in the BCPA. Compatibility is a common concern for small lots; the parcels affected by this text amendment would not have significant compatibility concerns. The only edge that is adjacent to existing homes is along Norwood Street, and this frontage is a mix of attached and detached homes as permitted in RML. The text amendment continues to meet the density range outlined in the purpose statement.

#### Chapter 9 – Plan Map

##### TDC 9.046. - Area 16 Basalt Creek Planning Area.

---

The Basalt Creek Planning Area is generally located north of Basalt Creek Parkway, south of Helenius Road and Norwood Road, east of 124th Avenue, and west of I-5. The Basalt Creek Planning Area includes a mix of residential zones at various densities, a small neighborhood commercial node, an employment lands, as further described below.

- (2) An area with the RML (Medium Low Density Residential) Zone is planned south of Norwood Road, east of Boones Ferry Road, and west of I-5. An additional area of RML Zone is also planned east of Grahams Ferry Road between the two above described areas of RL Zone. These areas lends themselves to a slightly higher density than traditional single—family due to the excellent transportation access and the close relationship to the employment centers. The use of the RML Zone in this area provides for the needed higher densities with a Zone that will allow development that is similar in character and density to the RL lands.

**Response:** This goal aims to accommodate a slightly higher density in the BCPA while respecting the character of the surrounding community. This application proposes to change the development code to permit single-family detached housing as a permitted use at densities consistent with other forms of housing currently permitted within the RML zone and provide appropriate development standards for single-family detached development. The type of development which would be permitted by this text amendment would be even more similar in character and form to development permitted within the adjacent RL lands.

## TUALATIN DEVELOPMENT CODE

### Chapter 32 – Procedures

#### TDC 32.010. – Purpose and Applicability

- (1) *Purpose.* The purpose of this Chapter is to establish standard procedures for the review and processing of land use applications and legislative land use proposals, as well as ministerial actions. This Chapter is intended to enable the City, the applicant, and the public, where applicable, to reasonably review applications and participate in the local decision-making process in a timely and effective way. Table 32-1 provides a key for determining the review procedure and the decision-making body for particular applications.
- (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).

Table 32-1

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 33.070

**Response:** The applicants have submitted an application for a text amendment to the TDC. The application effectively involves six parcels within the BCPA with project sites over 15 acres. The requested decision affects a limited number of properties and will require public notice and a public hearing.

**TDC 32.030. – Time to Process Applications.**

*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.)

*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.

**Response:** The applicant requests that the City come to a decision regarding this Type IV-A land use application within 120 days of deeming the application complete.

**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.

**Response:** The applicant and their representatives have attended several pre-application conferences with the City of Tualatin to discuss the overall project and this specific text amendment. The required pre-application conference was held with City of Tualatin Staff on January 22, 2020, prior to the application submittal date.

- 
- (4) *Application Requirements for Pre-Application Conference.*
    - (a) *Application Form.* Pre-application conference requests must be made on forms provided by the City Manager.
    - (b) *Submittal Requirements.* Pre-application conference requests must include:
      - (i) A completed application form;
      - (ii) Payment of the application fee;
      - (iii) The information required, if any, for the specific pre-application conference sought; and
      - (iv) Any additional information the applicant deems necessary to demonstrate the nature and scope of the proposal in sufficient detail to allow City staff to review and comment.
  - (5) *Scheduling of Pre-Application Conference.* Upon receipt of a complete application, the City Manager will schedule the pre-application conference. The City Manager will coordinate the involvement of city departments, as appropriate, in the pre-application conference. Pre-application conferences are not open to the general public.
  - (6) *Validity Period for Mandatory Pre-Application Conferences; Follow-Up Conferences.* A follow-up conference is required for those mandatory pre-application conferences that have previously been held when:
    - (a) An application relating to the proposed development that was the subject of the pre-application conference has not been submitted within six months of the pre-application conference;
    - (b) The proposed use, layout, and/or design of the proposal have significantly changed; or
    - (c) The owner and/or developer of a project changes after the pre-application conference and prior to application submittal.

**Response:** The required pre-application conference was held on January 22, 2020.

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.

**Response:** For this type of application, a Neighborhood/Developer Meeting is required, and was therefore held on June 10, 2020. The application was submitted prior to holding the Neighborhood/Developer Meeting due to the complications of arranging a public meeting during the current public health crisis. With the City of Tualatin’s Temporary Guidance for Neighborhood/Developer Meetings, a meeting was held and these criteria are satisfied.



- 
- (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.

**Response:** Per the City of Tualatin’s “COVID-19 Public Health Response Temporary Guidance for Neighborhood/Developer Meetings” Procedures 1 and 2, the Applicant has held a Neighborhood/Developer Meeting established on a digital platform (Zoom) that is publicly accessible and does not require a user login or subscription to join the meeting. The digital platform also allowed for a call-only option for non-internet users. The meeting was scheduled for June 10, 2020 at 6:00 p.m., meeting the above weekday scheduling requirements.

- (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.

**Response:** Notice of the Neighborhood/Developer Meeting was mailed first class with a description of the proposal and instructions on how to join the meeting on May 27, 2020. This date was 14 days prior to the virtual meeting, in keeping with TDC and the City’s Virtual Neighborhood/Developer Meeting Procedures. The notice included instructions on how to view materials to be presented during the meeting, preliminary details of the major elements of the proposal, and whether there would be future applications. The meeting materials were available more than two days prior to the meeting and will be available for at least 10 days after the meeting concludes. These requirements have been or will be satisfied.

- (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.

**Response:** The applicant obtained mailing labels from the City of Tualatin. All property owners within 1,000 feet of the text amendment affected property boundaries were provided with

---

notice, including all property owners within a platted residential subdivision located within 1,000 feet of the boundaries. Additionally, all designated representatives of Byrom CIO (CIO-6) and the City of Tualatin were provided notice electronically. These mailing lists, copies of notices, affidavits of mailing and posting, and emailed copies of notices are included within the attached exhibits. These provisions are met.

- (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.

**Response:** Signs conforming to the design and placement standards established by the City were posted on all subject properties May 27, 2020, 14 days prior to the virtual Neighborhood/Developer Meeting.

- (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.

**Response:** The required attendee information and meeting notes are attached to this submission. The meeting notes include the required information: major points, issues, and responses concerning the application, including identifying those attending. During the meeting, all submitted questions and comments received prior to or during the meeting were read aloud. These requirements are met.

**TDC 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.
- (2) *Type IV-A or B Applications.* Type IV-A or B applications may be initiated by the City.

**Response:** This application has been submitted by the property owners and contract purchasers of all properties affected by the proposed text amendment.

**Chapter 33 – Applications and Approval Criteria**

**TDC 33.070. – Plan Amendments.**

- 
- (1) *Purpose.* To provide processes 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 Community Plan.

**Response:** The applicants have identified a need for a text amendment to the TDC in order to allow single-family detached housing within a subsection of the BCPA. This area currently only permits the development of single-family attached housing or multi-family developments. This application for a text amendment would permit the construction of single-family detached dwellings at the densities outlined within the Basalt Creek Concept Plan and in accordance with the City’s newly adopted HNA.

- (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.

**Response:** A pre-application conference with City of Tualatin staff has identified this application for text amendment, with a limited scope affecting a small number of properties, as requiring a quasi-judicial process. This application has been submitted by the property owners and their authorized representatives. This criterion is met.

- (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.

**Response:** The applicants request that this quasi-judicial application, which affects a limited number of properties within the BCPA, be subject to a Type IV-A Review in accordance with the procedures outlined within 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).

**Response:** The applicants have submitted the required materials in accordance with TDC 32.140. These specific materials were outlined previously within this application. This criterion is met.

- (5) *Approval Criteria.*
- (a) Granting the amendment is in the public interest.
  - (b) The public interest is best protected by granting the amendment at this time.

**Response:** The proposed text amendment would allow RML-zoned properties within the BCPA to develop with single-family detached as well as single-family attached dwellings. The City of Tualatin’s HNA identifies that single-family detached dwellings are needed housing and over 1,000 new dwelling units are required during the period of 2020-2040. Over 400 of these households are forecast to be located within Basalt Creek. The construction of a wide variety of housing types will allow the City to meet its housing goals over the 20-year planning period. Providing needed housing is in the best interests of the public.

---

Preparing for future needs protects the public interest over the long term. The application meets these criteria.

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

**Response:** The Tualatin Community Plan is incorporated into the TDC as Chapters 1 through 30. The criteria and objectives of the Tualatin Community Plan have been reviewed and responses provided previously within this application. This criterion is satisfied.

- (d) The following factors were consciously considered:
  - (i) The various characteristics of the areas in the City;
  - (ii) The suitability of the areas for particular land uses and improvements in the areas;
  - (iii) Trends in land improvement and development;
  - (iv) Property values;
  - (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;
  - (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;
  - (viii) The public need for healthful, safe, esthetic surroundings and conditions; and
  - (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.

**Response:** The application considers and responds to each of these criteria previously within this application. The application has considered each of the factors and their effect on the proposal. These criteria are 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.

**Response:** The proposed text amendment involves residential uses. Jim Rose, Chief Operations Officer of the Sherwood School District, stated that since a new high school is under construction and remodels and expansions are underway at three other schools to increase capacity at all levels K-12, this was a good time to absorb enrollment growth. This provision has been satisfied.

- (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).

**Response:** The proposed amendment is consistent with Oregon Statewide Goal 10 (OAR 660-015-0000(10)) as it does not seek to change densities within the area in question.

---

Per OAR 660-007-0005(7), “needed housing” is any housing type which has been determined to meet the need shown for housing within an Urban Growth Boundary at “particular price ranges and rent levels.” This change will help the City fulfill more aspects of its projected needed housing, over 1000 new housing units and 571 new households by 2040, with 443 of those households being within in the Basalt Creek area.

The text amendment, as proposed, is consistent with Oregon Administrative Rule 660-007 (the Metropolitan Housing Rule), as it maintains the opportunity for “at least 50 percent of new residential units to be attached single family housing or multiple family housing.” The proposed amendment does not eliminate the opportunity to construct these housing types, as they are already permitted within the RML zone, nor does it propose to change density targets (currently 10 units per buildable acre) within the UGB per OAR 660-007-0035(2). The text amendment will make meeting these density targets easier within the RML zone.

The proposal will allow the construction of needed housing and the efficient use of lands within the City of Tualatin. Oregon’s Transportation Planning Rule (OAR 660-012-0060) does not apply to this proposal, as this proposal does not functionally increase the effect of development on transportation facilities. The amendment seeks to permit single-family detached dwellings within RML-zoned sites in the BCPA. These sites currently permit single-family attached dwellings, which, according to the Institute of Traffic Engineers, generate the same number of trips as single-family detached homes. Therefore, no material change in possible traffic demand has been proposed. No transportation facilities will be degraded or have their functional classifications changed by this amendment. These criteria have been met.

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

**Response:** The Metropolitan Service District’s Urban Growth Management Functional Plan is established in Metro Code as Section 3.07. Since the proposed amendment does not seek to adjust minimum or maximum densities required by the RML zone, this amendment is consistent. The proposed code changes also do not decrease housing supply or capacity. 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 9-4), and E/E for the rest of the 2040 Design Types in the City’s planning area.
- (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.
- (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. TDC Map 9-1 illustrates this area.

---

**Response:** The proposed text amendment will not alter the transportation needs of the affected parcels in the City’s Transportation System Plan. Density requirements will remain the same for housing types as outlined within TDC 41.220. Applications for future development will be required to provide Traffic Impact Analyses per development code. The proposal is consistent, and these criteria are met.

**Chapter 41 – Medium Low Density Residential Zone (RML)**

**TDC 41.100 - Purpose**

The purpose of this zone is to provide areas of the City suitable for townhouses, condominiums, duplexes, triplexes and other multi-family dwellings, as well as areas for small-lot, small home subdivisions, and manufactured dwelling parks in designated areas.

**Response:** This proposed change to the Tualatin Development Code will encourage the construction of needed housing to serve the growing industrial and commercial areas of the BCPA and the community of Tualatin.

**TDC 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	C	Limited to single-family dwellings in a small lot subdivision, with conditional use permit, subject to TDC 36.410.

**Response:** The proposed code amendment would allow single-family detached dwellings to be permitted outright and constructed within a limited section of the City’s RML-zoned areas within the BCPA.

**IV. Conclusion**

The required findings have been made and this written narrative and accompanying documentation demonstrate that the application is consistent with the applicable provisions of the Tualatin Development Code and the Tualatin Community Plan. The evidence in the record is substantial and supports approval of the application. Therefore, the Applicant respectfully requests that the City approve this application for a text amendment to the Tualatin Development Code.



---

## **Exhibit B: Proposed Tualatin Development Code Text Amendment**

---

**TDC 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	C/P	Limited to single-family dwellings in a small lot subdivision, with conditional use permit, subject to TDC 36.410. Permitted within the Basalt Creek Planning Area subject to TDC 41.330.
Accessory Dwelling Unit	P	Subject to TDC 34.600.
Duplex		
Townhouse (or Rowhouse)	P	See TDC definition in 31.060.
Multi-Family Structure	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.

**TDC 41.300. - Development Standards.**

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).

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

STANDARD	REQUIREMENT	LIMITATIONS AND CODE REFERENCES
<b>MAXIMUM DENSITY</b>		
Household Living Uses	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	
<b>MINIMUM LOT SIZE</b>		
Townhouse (or Rowhouse)	1,400 square feet	
Multi-Family Structure and Duplex		
• Development on Less than One Acre	10,000 square feet	For up to two units, plus an additional 4,195 square feet for each unit exceeding two.



• Development on More than One Acre	4,356 square feet per unit	
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
<b>MINIMUM AVERAGE LOT WIDTH</b>		
Townhouse (or Rowhouse)	14 feet	
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.
<b>MINIMUM SETBACKS</b>		
Front Setback		Minimum setback to a garage door must be 20 feet.
• 1 story structure	20 feet	
• 1.5 story structure	25 feet	
• 2 story structure	30 feet	
• 2.5 story structure	35 feet	
• Townhouse (or Rowhouse)	0-20 feet	As determined through Architectural Review process.
Side and Rear Setback		Where living spaces face a side yard, the minimum setback must be ten feet
• 1 story structure	5 feet	
• 1.5 story structure	7 feet	
• 2 story structure	10 feet	
• 2.5 story structure	12 feet	
Corner Lots	—	On corner lots, the setback is the same as the front yard setback on any side facing a street other than an alley.
Minimum Distance Between Buildings within One Development	10 feet	For Townhouses, determined through the Architectural Review process
Parking and Vehicle Circulation Areas	10 feet	For Townhouses, determined through the Architectural Review process
Conditional Uses	—	As determined through Architectural Review process. No minimum setback must be greater than 50 feet
Any Yard Area Adjacent to Basalt Creek Parkway	50 feet	
<b>MAXIMUM STRUCTURE HEIGHT</b>		
All Uses	35 feet	May be increased to a maximum of 50 feet with a conditional use permit, if all setbacks are not less than 1½ times the height of the building.

<b>MAXIMUM LOT COVERAGE</b>		
Townhouse (or Rowhouse)	90%	
All Other Permitted Uses	40%	
Conditional Uses	45%	

**TDC 41.330. - Development Standards.**

Development standards for Household Living Uses in the RML zone within the Basalt Creek Planning Area are listed in Table 41-4. The standards of TDC 41.330 apply to RML-zoned properties within the Basalt Creek Planning Area with project sites which are greater than 15 acres in size. Additional standards may apply to some uses and situations, see TDC 41.310.

**Table 41-4  
Development Standards in the RML Zone within the Basalt Creek Planning Area**

<b>STANDARD</b>	<b>REQUIREMENT</b>	<b>LIMITATIONS AND CODE REFERENCES</b>
<b>MAXIMUM DENSITY</b>		
Household Living Uses	10 units per acre	
<b>MINIMUM AVERAGE LOT SIZE</b>		
Single Family Lot	3,000 square feet	
<b>MINIMUM AVERAGE LOT WIDTH</b>		
Single Family Detached Lot	26 feet	
Townhouse (or Rowhouse)	14 feet	
Flag Lots	—	Must be sufficient to comply with minimum access requirements of TDC 73C.
<b>MINIMUM SETBACKS</b>		
Front Setback		
• building	10 feet	
• garage	20 feet	
Side Setback	5 feet	
Rear Setback	10 feet	
Street side setback	10 feet	
Any Yard Area Adjacent to Basalt Creek Parkway	50 feet	
<b>MAXIMUM STRUCTURE HEIGHT</b>		
All Uses	35 feet	May be increased to a maximum of 50 feet with a conditional use permit, if all setbacks are not less than 1½ times the height of the building.
<b>MAXIMUM LOT COVERAGE</b>		
Single Family Detached Lot	55%	
Townhouse (or Rowhouse)	90%	

## Medium Low-Density Residential District

The district is designed to serve as a transitional zone between Low-Density Residential, which only permits detached single-family residences outright, and Medium High-Density Residential, which only permits multi-family dwellings outright. Despite being a transitional zone, the RML district does not currently permit detached single-family residential dwellings without a conditional use permit. The RML district should permit those types of dwellings where they can be provided in a density satisfactory to the City's HNA.

### TDC 5.040. - Planning District Objectives.

- (2) *Medium-Low Density Residential Planning District (RML).* To provide areas of the City suitable for commonwall dwellings such as condominiums, townhouses, duplexes, triplexes, and other multi-family dwellings. Condominiums and small lot subdivisions may be allowed by conditional use permit. Owner occupancy of dwelling units shall be encouraged. Parks for manufactured dwellings shall be allowed in those portions of the district designated on the Plan Map. Except for retirement housing and nursing and convalescent homes which shall not exceed 15 dwelling units per net acre and manufactured dwelling parks with single-wide manufactured dwellings which shall not exceed 12 dwelling units per net acre, the maximum density of any residential use shall not exceed ten dwelling units per net acre. The raising of agricultural animals and the construction of agricultural structures may be allowed by conditional use permit in those portions of the District designated on the Plan Map.

The Text Amendment proposed by the Applicants requires an additional modification to the existing purpose statement above. The Applicants propose an additional modification as shown below:

- (2) *Medium-Low Density Residential Planning District (RML).* To provide areas of the City suitable for commonwall dwellings such as condominiums, townhouses, duplexes, triplexes, and other multi-family dwellings. Condominiums and small lot subdivisions may be allowed by conditional use permit. **Detached housing is permitted for projects over 15 acres in size within the Basalt Creek Planning Area.** Owner occupancy of dwelling units shall be encouraged. Parks for manufactured dwellings shall be allowed in those portions of the district designated on the Plan Map. Except for retirement housing and nursing and convalescent homes which shall not exceed 15 dwelling units per net acre and manufactured dwelling parks with single-wide manufactured dwellings which shall not exceed 12 dwelling units per net acre, the maximum density of any residential use shall not exceed ten dwelling units per net acre. The raising of agricultural animals and the construction of agricultural structures may be allowed by conditional use permit in those portions of the District designated on the Plan Map.

This additional sentence is needed to acknowledge the proposed amendment to the development code; it is not a substantive change to the proposal.

## **Exhibit A: Land Use Application**

---

---



## Land Use Application

Project Information		
Project Title: <b>Basalt Creek Text Amendment</b>		
Brief Description: An application for a text amendment to the Tualatin Development Code to allow single-family detached housing to be developed under Medium-Low Density Residential (RML) zoning within the Basalt Creek Planning Area with project sites over 15 acres in size.		
Property Information		
Address: <b>23680, 23740 SW Boones Ferry Rd.; 9185, 9335, 9415 SW Greenhill Ln.</b>		
Assessor's Map Number and Tax Lots: <b>2S135D, Lots 100, 400, 401, 500, 501, 600, 800, and 900</b>		
Applicant/Primary Contact		
Name: <b>Mimi Doukas, AICP, RLA</b>	Company Name: <b>AKS Engineering &amp; Forestry, LLC</b>	
Address: <b>12965 SW Herman Road, Suite 100</b>		
City: <b>Tualatin</b>	State: <b>OR</b>	ZIP: <b>97062</b>
Phone: <b>(503) 563-6151</b>	Email: <b>mimid@aks-eng.com</b>	
Property Owner		
Name: <b>Autumn Sunrise, LLC</b>		
Address: <b>485 S. State Street</b>		
City: <b>Lake Oswego</b>	State: <b>OR</b>	ZIP: <b>97034</b>
Phone: <b>Please contact applicant</b>	Email: <b>Please contact applicant</b>	
Property Owner's Signature: 		Date: <b>04/27/2020</b>
<i>(Note: Letter of authorization is required if not signed by owner)</i>		
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: 		Date: <b>6/16/2020</b>

**Land Use Application Type:**

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

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



## Land Use Application

<b>Project Information</b>		
Project Title: <b>Basalt Creek Text Amendment</b>		
Brief Description: An application for a text amendment to the Tualatin Development Code to allow single-family detached housing to be developed under Medium-Low Density Residential (RML) zoning within the Basalt Creek Planning Area, east of SW Boones Ferry Road, and with project sites over 20 acres in size.		
<b>Property Information</b>		
Address: 23680, 23740 SW Boones Ferry Rd. ; 9335, 9185 SW Greenhill Ln.		
Assessor's Map Number and Tax Lots: 2S135D, Lots 100, 400, 401, 600, 800, and 900		
<b>Applicant/Primary Contact</b>		
Name: <b>Mimi Doukas, AICP, RLA</b>		Company Name: <b>AKS Engineering &amp; Forestry, LLC</b>
Address: <b>12965 SW Herman Road, Suite 100</b>		
City: <b>Tualatin</b>	State: <b>OR</b>	ZIP: <b>97062</b>
Phone: <b>(503) 563-6151</b>		Email: <b>mimid@aks-eng.com</b>
<b>Property Owner</b>		
Name: <b>PO 1: Autumn Sunrise, LLC</b>		<b>PO 2: Venture Properties, Inc.</b>
Address: <b>485 S. State Street, Lake Oswego, OR 97034</b>		<b>4230 SW Galewood St. Suite 100, Lake Oswego OR 97035</b>
City:	State:	ZIP:
Phone: <b>Please contact Applicant's Representative</b>		Email: <b>Please contact Applicant's Representative</b>
Property Owner's Signature: PO1: <i>Paul Pennington</i> PO2: <i>(Paul Pennington)</i>		Date: <b>04/15/2020</b>
<small>(Note: Letter of authorization is required if not signed by owner)</small>		
<b>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.</b>		
Applicant's Signature: <i>Doukas</i>		Date: <b>6/16/2020</b>

**Land Use Application Type:**

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

<b>Office Use</b>		
Case No:	Date Received:	Received by:
Fee:	Receipt No:	

## **Exhibit C: Property Title Information**

---

---



# FIRST AMERICAN TITLE Property Research Report

#### SUBJECT PROPERTY

R560253, R560262, R560299, R560306, R560315  
2S135D00400, 2S135D00401, 2S135D00600, 2S135D00800, 2S135D00900  
Washington

#### OWNER

Autumn Sunrise LLC

#### DATE PREPARED

03/31/2020

#### PREPARED BY

bkelner@firstam.com



*First American Title*

Customer Service 503.219.8746  
cs.oregon@firstam.com

©2018 First American Financial Corporation and/or its affiliates.

All rights reserved. | NYSE: FAF | 39203000418





**First American Title™**

Customer Service Department

Phone: 503.219.TRIO (8746)

Fax: 503.790.7872

Email: cs.oregon@firstam.com

Date: 3/31/2020

## OWNERSHIP INFORMATION

Owner: Autumn Sunrise LLC  
CoOwner:  
Site: 23620 SW Boones Ferry Rd Tualatin OR 97062  
Mail: 485 S State St Lake Oswego OR 97034

Parcel #: R560262  
Ref Parcel #: 2S135D000401  
TRS: 02S / 01W / 35 / SE  
County: Washington

## PROPERTY DESCRIPTION

Map Grid: 715-E1  
Census Tract: 032110 Block: 1004  
Neighborhood: Cpo 5 Sherwood-Tualatin S1  
School Dist: 88J Sherwood  
Impr Type:  
Subdiv/Plat:  
Land Use: 1910 - Urban Developable Tract Improved  
Std Land Use: RSFR - Single Family Residence  
Zoning: Tualatin-RML - Medium-Low Density Residential  
Lat/Lon: 45.34924660 / -122.76892857  
Watershed: Fanno Creek-Tualatin River  
Legal: ACRES 17.55

## ASSESSMENT AND TAXATION

Market Land: \$3,880,480.00  
Market Impr: \$0.00  
Market Special: \$0.00  
Market Total: \$3,880,480.00 (2019)  
% Improved: 0.00%  
Assessed Total: \$644,220.00 (2019)  
Levy Code: 88.13  
Tax: \$9,971.63 (2019)  
Millage Rate: 15.4786  
Exemption:  
Exemption Type:

## PROPERTY CHARACTERISTICS

Bedrooms: 3	Total SqFt: 1,414 SqFt	Year Built:
Baths, Total: 2.00	First Floor: 1,414 SqFt	Eff Year Built: 1999
Baths, Full:	Second Floor:	Lot Size Ac: 17.55 Acres
Baths, Half:	Basement Fin:	Lot Size SF: 764,478 SqFt
Total Units:	Basement Unfin:	Lot Width:
# Stories:	Basement Total:	Lot Depth:
# Fireplaces:	Attic Fin:	Roof Material: Comp Shingle
Cooling:	Attic Unfin:	Roof Shape:
Heating: Forced Air	Attic Total:	Ext Walls: Wood
Building Style:	Garage: Garage 420 SqFt	Const Type: Wood Frame

## SALES AND LOAN INFORMATION

Owner	Date	Doc #	Sale Price	Deed Type	Loan Amt	Loan Type
GRACE COMMUNITY CHURCH	9/28/2007	0000105096		Grant		Conv/Unk
GRACE COMMUNITY CHURCH	6/17/2005	0000069065		Trust	\$4,500,000.00	Conv/Unk

Sentry Dynamics, Inc. and its customers make no representations, warranties or conditions, express or implied, as to the accuracy or completeness of information contained in this report.



**First American Title™**

Customer Service Department

Phone: 503.219.TRIO (8746)

Fax: 503.790.7872

Email: cs.oregon@firstam.com

Date: 3/31/2020

## OWNERSHIP INFORMATION

Owner: Autumn Sunrise LLC  
CoOwner:  
Site: 9335 SW Greenhill Ln Tualatin OR 97062  
Mail: 485 S State St Lake Oswego OR 97034

Parcel #: R560299  
Ref Parcel #: 2S135D000600  
TRS: 02S / 01W / 35 / SE  
County: Washington

## PROPERTY DESCRIPTION

Map Grid: 715-E1  
Census Tract: 032110 Block: 1004  
Neighborhood: Cpo 5 Sherwood-Tualatin S1  
School Dist: 88J Sherwood  
Impr Type: R1 - Residence Single Family  
Subdiv/Plat:  
Land Use: 1910 - Urban Developable Tract Improved  
Std Land Use: RSFR - Single Family Residence  
Zoning: Tualatin-RML - Medium-Low Density Residential  
Lat/Lon: 45.34763348 / -122.77267464  
Watershed: Abernethy Creek-Willamette River  
Legal: ACRES 2.87

## ASSESSMENT AND TAXATION

Market Land: \$638,010.00  
Market Impr: \$83,170.00  
Market Special: \$0.00  
Market Total: \$721,180.00 (2019)  
% Improved: 12.00%  
Assessed Total: \$297,710.00 (2019)  
Levy Code: 88.13  
Tax: \$4,608.13 (2019)  
Millage Rate: 15.4786  
Exemption:  
Exemption Type:

## PROPERTY CHARACTERISTICS

Bedrooms: 2	Total SqFt: 1,548 SqFt	Year Built: 1940
Baths, Total: 2.00	First Floor: 1,548 SqFt	Eff Year Built: 1960
Baths, Full:	Second Floor:	Lot Size Ac: 2.87 Acres
Baths, Half:	Basement Fin:	Lot Size SF: 125,017 SqFt
Total Units:	Basement Unfin:	Lot Width:
# Stories:	Basement Total:	Lot Depth:
# Fireplaces:	Attic Fin:	Roof Material: Comp Shingle
Cooling:	Attic Unfin:	Roof Shape:
Heating: Baseboard	Attic Total:	Ext Walls: Siding
Building Style:	Garage: Garage 480 SqFt	Const Type: Wood Frame

## SALES AND LOAN INFORMATION

Owner	Date	Doc #	Sale Price	Deed Type	Loan Amt	Loan Type
ROOT HOLDINGS LLC	9/28/2007	0000105096		Warranty		Conv/Unk
ROOT HOLDINGS LLC	6/17/2005	0000069069	\$1,600,000.00	Warranty		

Sentry Dynamics, Inc. and its customers make no representations, warranties or conditions, express or implied, as to the accuracy or completeness of information contained in this report.



**First American Title™**

Customer Service Department

Phone: 503.219.TRIO (8746)

Fax: 503.790.7872

Email: cs.oregon@firstam.com

Date: 3/31/2020

## OWNERSHIP INFORMATION

Owner: Autumn Sunrise LLC  
CoOwner:  
Site: 9185 SW Greenhill Ln Tualatin OR 97062  
Mail: 485 S State St Lake Oswego OR 97034

Parcel #: R560306  
Ref Parcel #: 2S135D000800  
TRS: 02S / 01W / 35 / SE  
County: Washington

## PROPERTY DESCRIPTION

Map Grid: 715-E1  
Census Tract: 032110 Block: 1004  
Neighborhood: Cpo 5 Sherwood-Tualatin S1  
School Dist: 88J Sherwood  
Impr Type: R1 - Residence Single Family  
Subdiv/Plat:  
Land Use: 1910 - Urban Developable Tract Improved  
Std Land Use: RSFR - Single Family Residence  
Zoning: Tualatin-RML - Medium-Low Density Residential  
Lat/Lon: 45.34764703 / -122.77136150  
Watershed: Abernethy Creek-Willamette River  
Legal: ACRES 3.75

## ASSESSMENT AND TAXATION

Market Land: \$829,050.00  
Market Impr: \$46,430.00  
Market Special: \$0.00  
Market Total: \$875,480.00 (2019)  
% Improved: 5.00%  
Assessed Total: \$254,740.00 (2019)  
Levy Code: 88.13  
Tax: \$3,943.04 (2019)  
Millage Rate: 15.4786  
Exemption:  
Exemption Type:

## PROPERTY CHARACTERISTICS

Bedrooms: 3	Total SqFt: 1,178 SqFt	Year Built: 1920
Baths, Total: 1.00	First Floor: 954 SqFt	Eff Year Built: 1960
Baths, Full:	Second Floor: 224 SqFt	Lot Size Ac: 3.75 Acres
Baths, Half:	Basement Fin:	Lot Size SF: 163,350 SqFt
Total Units:	Basement Unfin:	Lot Width:
# Stories:	Basement Total:	Lot Depth:
# Fireplaces:	Attic Fin: 224 SqFt	Roof Material: Comp Shingle
Cooling:	Attic Unfin:	Roof Shape:
Heating: Forced Air	Attic Total: 224 SqFt	Ext Walls: Siding
Building Style:	Garage:	Const Type: Wood Frame

## SALES AND LOAN INFORMATION

Owner	Date	Doc #	Sale Price	Deed Type	Loan Amt	Loan Type
	9/28/2007	0000105096				Conv/Unk

Sentry Dynamics, Inc. and its customers make no representations, warranties or conditions, express or implied, as to the accuracy or completeness of information contained in this report.



**First American Title™**

Customer Service Department

Phone: 503.219.TRIO (8746)

Fax: 503.790.7872

Email: cs.oregon@firstam.com

Date: 3/31/2020

## OWNERSHIP INFORMATION

Owner: Autumn Sunrise LLC

CoOwner:

Site: OR 97062

Mail: 485 S State St Lake Oswego OR 97034

Parcel #: R560315

Ref Parcel #: 2S135D000900

TRS: 02S / 01W / 35 / SE

County: Washington

## PROPERTY DESCRIPTION

Map Grid: 715-E1

Census Tract: 032110 Block: 1004

Neighborhood: Cpo 5 Sherwood-Tualatin S1

School Dist: 88J Sherwood

Impr Type:

Subdiv/Plat: Tualatin Orchard Tract

Land Use: 1900 - Urban Developable Tract - Vacant

Std Land Use: RCON - Condominium, Pud

Zoning: Tualatin-RML - Medium-Low Density Residential

Lat/Lon: 45.34768533 / -122.76930598

Watershed: Abernethy Creek-Willamette River

Legal: TUALATIN ORCHARD TRACT, LOT PT 4, ACRES 6.68

## ASSESSMENT AND TAXATION

Market Land: \$1,033,910.00

Market Impr: \$0.00

Market Special: \$0.00

Market Total: \$1,033,910.00 (2019)

% Improved: 0.00%

Assessed Total: \$789,420.00 (2019)

Levy Code: 88.13

Tax: \$12,219.12 (2019)

Millage Rate: 15.4786

Exemption:

Exemption Type:

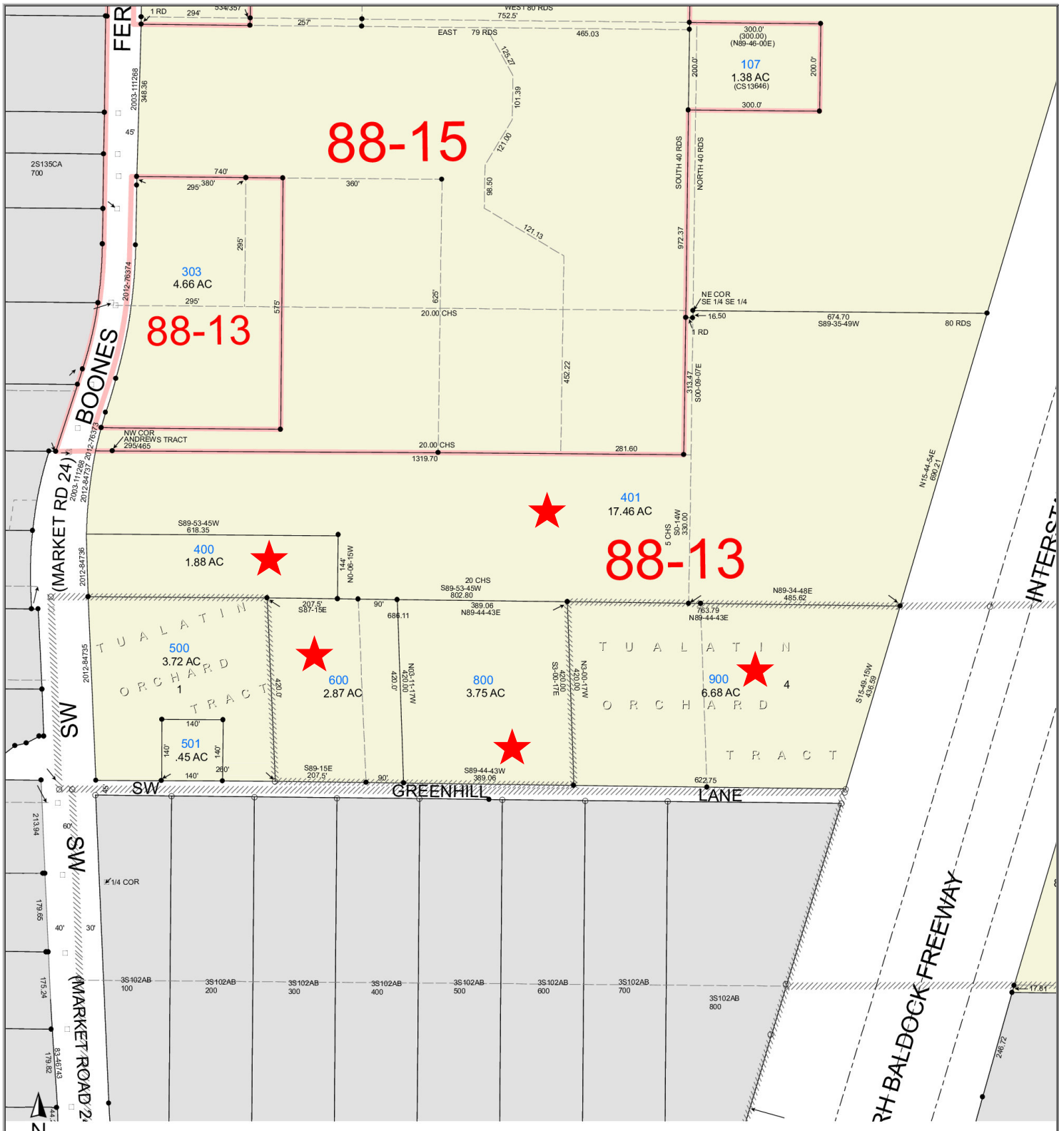
## PROPERTY CHARACTERISTICS

Bedrooms:	Total SqFt:	Year Built:
Baths, Total:	First Floor:	Eff Year Built:
Baths, Full:	Second Floor:	Lot Size Ac: 6.68 Acres
Baths, Half:	Basement Fin:	Lot Size SF: 290,981 SqFt
Total Units:	Basement Unfin:	Lot Width:
# Stories:	Basement Total:	Lot Depth:
# Fireplaces:	Attic Fin:	Roof Material:
Cooling:	Attic Unfin:	Roof Shape:
Heating:	Attic Total:	Ext Walls: Wood
Building Style:	Garage:	Const Type:

## SALES AND LOAN INFORMATION

Owner	Date	Doc #	Sale Price	Deed Type	Loan Amt	Loan Type
AUTUMN SUNRISE LLC	9/26/2007	2007105096	\$7,143,000.00	DW		
ROOT HOLDINGS LLC	9/19/2005	0000114105	\$1,640,000.00	Grant	\$4,500,000.00	Conv/Unk
WILLEY,ANNIE M	10/7/2004	0000116501		Quit Claim		Conv/Unk

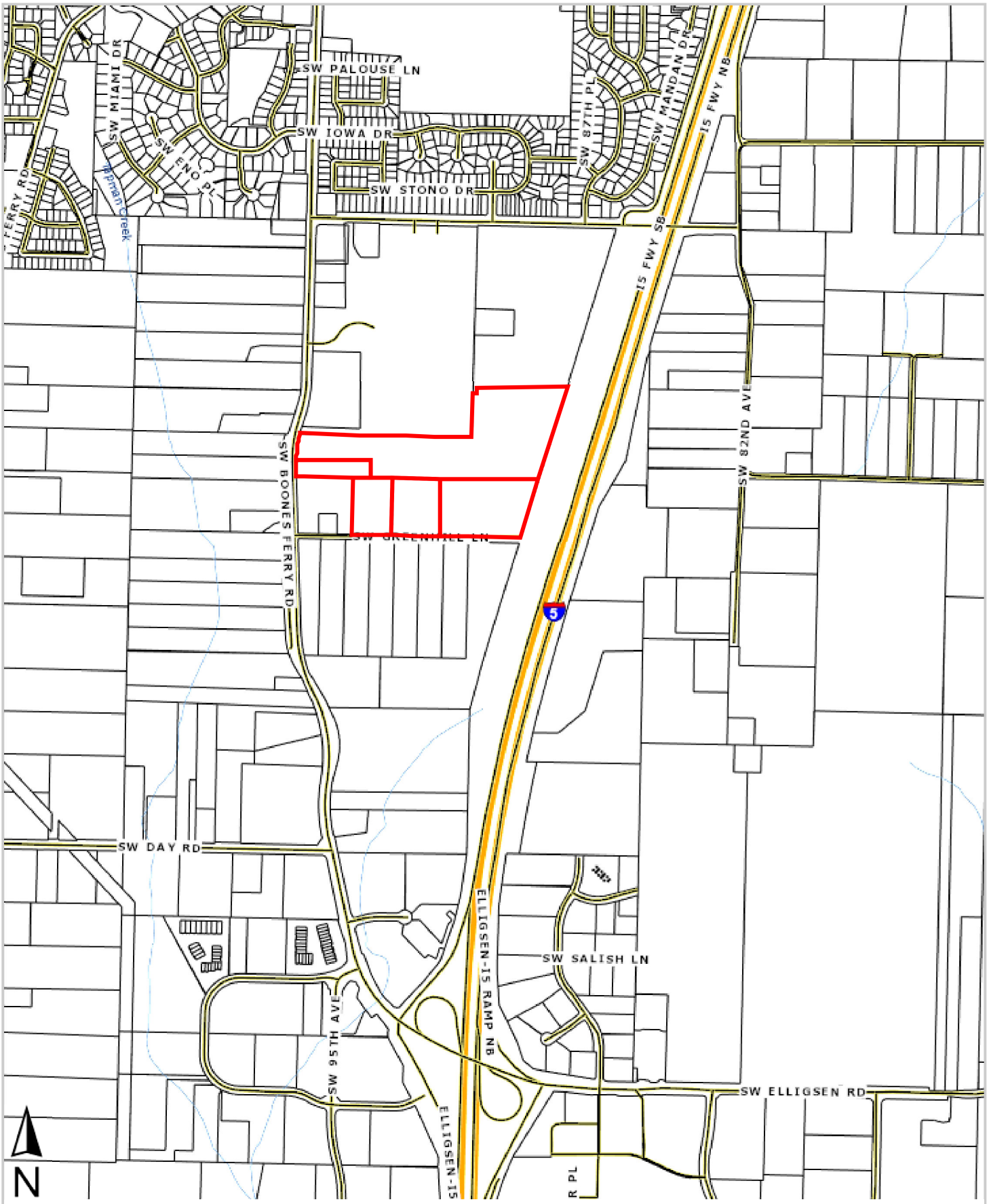
Sentry Dynamics, Inc. and its customers make no representations, warranties or conditions, express or implied, as to the accuracy or completeness of information contained in this report.



**First American Title™**

**ParcelID: R560253**  
**23740 SW Boones Ferry Rd**  
**Tualatin, OR 97062**

This map/plat is being furnished as an aid in locating the herein described land in relation to adjoining streets, natural boundaries and other land, and is not a survey of the land depicted. Except to the extent a policy of title insurance is expressly modified by endorsement, if any, the company does not insure dimensions, distances, location of easements, acreage or other matters shown thereon.



First American Title™

Washington County, Oregon 2007-105096  
09/28/2007 03:29:27 PM  
D-DW Cnt=1 Stn=16 D HOFFMAN  
\$25.00 \$5.00 \$11.00 \$7,143.00 - Total = \$7,184.00

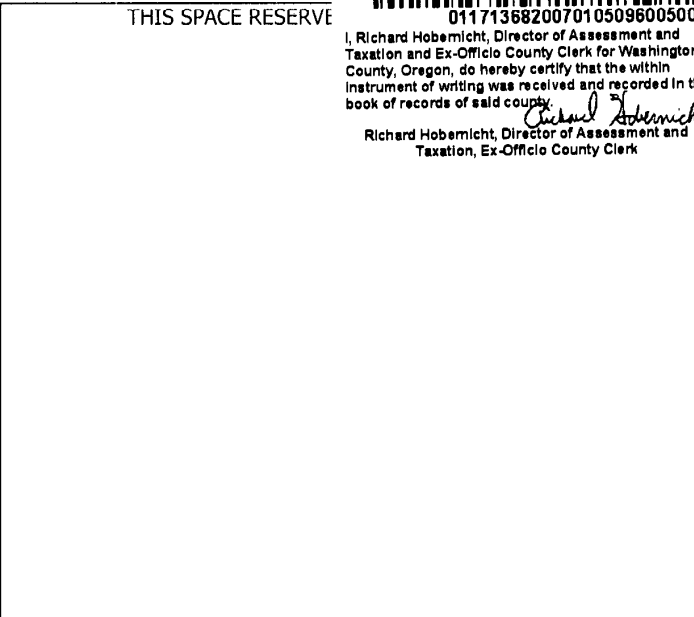


01171368200701050960050056

I, Richard Hobermicht, 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 Hobermicht, Director of Assessment and Taxation, Ex-Officio County Clerk



THIS SPACE RESERVE



After recording return to:  
Autumn Sunrise LLC  
1400 SW Schaeffer Road  
West Linn, OR 97068

Until a change is requested all tax statements shall be sent to the following address:  
Autumn Sunrise LLC  
1400 SW Schaeffer Road  
West Linn, OR 97068

File No.: 7073-1087491 (LSH)  
Date: September 14, 2007

2005  
41



1087491-LLC

FATCO. NO.

### STATUTORY SPECIAL WARRANTY DEED

**Kimball Hill Homes Oregon, Inc., an Oregon Corporation**, Grantor, conveys and specially warrants to **Autumn Sunrise LLC, an Oregon limited liability company**, Grantee, the following described real property free of liens and encumbrances created or suffered by the Grantor, except as specifically set forth herein:

**This property is free from liens and encumbrances, EXCEPT:**

1. The **2007/08** Taxes, a lien not yet payable.
2. Covenants, conditions, restrictions and/or easements, if any, affecting title, which may appear in the public record, including those shown on any recorded plat or survey.

See Legal Description attached hereto as Exhibit A and by this reference incorporated herein.

BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON TRANSFERRING FEE TITLE SHOULD INQUIRE ABOUT THE PERSON'S RIGHTS, IF ANY, UNDER ORS 197.352. 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 APPROVED USES, 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 197.352.

The true consideration for this conveyance is **\$7,143,000.00**.



WASHINGTON COUNTY  
REAL PROPERTY TRANSFER TAX  
\$ 7143.00 9-28-07  
FEE PAID DATE


APN: R560253

Statutory Special Warranty Deed  
- continued

File No.: 7073-1087491 (LSH)  
Date: 09/14/2007

Dated this 26<sup>TH</sup> day of SEPTEMBER, 2007.


Kimball Hill Homes Oregon, Inc., an Oregon corporation

  
By: Dudley McGee, Vice President

STATE OF California )  
 )ss.  
County of SACRAMENTO )

This instrument was acknowledged before me on this 26<sup>TH</sup> day of SEPTEMBER, 2007 by Dudley McGee as Vice President of Kimball Hill Homes Oregon, Inc., on behalf of the corporation.



  
Notary Public for California  
My commission expires: APRIL 20, 2008



APN: R560253

Statutory Special Warranty Deed  
- continued

File No.: 7073-1087491 (LSH)  
Date: 09/14/2007

### EXHIBIT A

#### LEGAL DESCRIPTION:

##### PARCEL I:

BEGINNING AT A POINT WHICH POINT IS 5 CHAINS SOUTH OF THE NORTHEAST CORNER OF THE SOUTHWEST QUARTER OF THE SOUTHEAST QUARTER OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST, WILLAMETTE MERIDIAN, WASHINGTON COUNTY, OREGON, AND RUNNING THENCE SOUTH 5 CHAINS TO A POINT; THENCE WEST 20 CHAINS, MORE OR LESS, TO THE CENTER OF THE COUNTY ROAD; THENCE NORTHERLY ALONG THE CENTER OF SAID COUNTY ROAD TO THE SOUTHWEST CORNER OF THAT CERTAIN TRACT OF LAND CONVEYED BY ANNIE C. VOGET IN FEE SIMPLE REMAINDER TO BEN D. ANDREWS AND HARRIET K. ANDREWS AS DESCRIBED IN BOOK 294 PAGE 587, DEED RECORDS OF WASHINGTON COUNTY; THENCE EAST ALONG THE SOUTH LINE OF SAID TRACT SO CONVEYED TO BEN D. ANDREWS AND HARRIET K. ANDREWS AS DESCRIBED IN BOOK 294 PAGE 587, DEED RECORDS OF SAID COUNTY, TO THE POINT OF BEGINNING, EXCEPT THAT PORTION DESCRIBED IN CONTRACT OF SALE IN FAVOR OF ROBERT K. COLE, AND WIFE, RECORDED MARCH 25, 1968 IN BOOK 686, PAGE 495, RECORDS OF WASHINGTON COUNTY.

##### PARCEL II:

A TRACT OF LAND SITUATED IN THE SOUTH ONE-HALF OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST OF THE WILLAMETTE MERIDIAN, IN THE COUNTY OF WASHINGTON AND STATE OF OREGON, AND BEING A PART OF THAT CERTAIN TRACT OF LAND DESCRIBED IN BOOK 294, PAGE 585, DEED OF RECORDS, WASHINGTON COUNTY, OREGON, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS, TO-WIT:

BEGINNING AT THE INTERSECTION OF THE WESTERLY LINE OF THE SOUTHEAST ONE-QUARTER OF SAID SECTION 35, WITH THE NORTHERLY LINE OF SAID TRACT OF LAND DESCRIBED IN BOOK 294, PAGE 585, DEED RECORDS. FROM SAID PLACE OF BEGINNING THENCE NORTH 89°53'45" EAST ALONG SAID NORTHERLY LINE OF SAID TRACT DESCRIBED IN BOOK 294, PAGE 585, 1319.70 FEET TO THE NORTHEAST CORNER OF SAID TRACT OF LAND; THENCE SOUTH 0°14' WEST 330.00 FEET TO THE NORTHERLY LINE OF TUALATIN ORCHARD TRACT; THENCE SOUTH 89°53'45" WEST ALONG SAID NORTHERLY LINE OF TUALATIN ORCHARD TRACT, 802.80 FEET; THENCE LEAVING SAID NORTHERLY LINE OF TUALATIN ORCHARD TRACT, NORTH 0°06'15" WEST 144 FEET; THENCE SOUTH 89°53'45" WEST PARALLEL WITH SAID NORTHERLY LINE OF TUALATIN ORCHARD TRACT, 618.35 FEET TO THE INTERSECTION OF EASTERLY RIGHT OF WAY LINE OF STATE HIGHWAY NO. 217; THENCE NORTHEASTERLY ALONG A CURVE TO THE RIGHT HAVING A RADIUS OF 883.87 FEET THROUGH A CENTRAL ANGLE OF 10°55'20" A DISTANCE OF 169.44 FEET TO A POINT OF TANGENT; THENCE NORTH 17°16' EAST 251.58 FEET; THENCE LEAVING SAID EASTERLY RIGHT OF WAY LINE OF STATE HIGHWAY NO. 217, NORTH 89°53'45" EAST 60.42 FEET TO THE PLACE OF BEGINNING.

TOGETHER WITH A PORTION OF PARCEL 1 OF THOSE CERTAIN TRACTS OF LAND IN THE SOUTHEAST QUARTER OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST, WILLAMETTE MERIDIAN, WASHINGTON COUNTY, OREGON CONVEYED TO GRACE COMMUNITY CHURCH OF THE ASSEMBLIES OF GOD, INC., BY DEED RECORDED AS DOCUMENT NUMBER 200155727 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 AS DOCUMENT NUMBER 2002004397 SAID DEED RECORDS AND RUNNING THENCE ALONG THE BOUNDARY OF SAID PARCEL 1, NORTH 89°34'48" EAST 485.62 FEET, NORTH 15°44'54" EAST 690.21 FEET, SOUTH 89°35'49" WEST 674.70 FEET SOUTH 00°09'07" EAST 16.50 FEET AND SOUTH 89°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 NUMBER 2002004397; 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.

## PARCEL III:

LOT 1, TUALATIN ORCHARDS TRACT, EXCEPTING THE WEST 140 FEET OF THE EAST 260 FEET OF THE SOUTH 140 FEET, IN THE COUNTY OF WASHINGTON AND STATE OF OREGON.

## PARCEL IV:

THE WEST 140 FEET OF THE EAST 260 FEET OF THE SOUTH 140 FEET OF LOT 1, TUALATIN ORCHARD TRACTS, IN THE COUNTY OF WASHINGTON AND STATE OF OREGON.

## PARCEL V:

THE WESTERLY MOST 207.5 FEET, BEING A PORTION OF THAT CERTAIN TRACT OF LAND LOCATED IN SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST OF THE WILLAMETTE MERIDIAN, CONVEYED BY GRACE SCHUSTER TO JOHN DAY AND JESSIE DAY, UNDER DATE OF APRIL 20, 1949, AS SET FORTH IN DEED RECORDED IN BOOK 294 AT PAGE 446, DEED RECORDS, SAID TRACT SO CONVEYED, OF WHICH THE LAND HEREBY CONVEYED FORMS A PART, BEING DESCRIBED AS FOLLOWS:

BEGINNING AT THE SOUTHEAST CORNER OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST, WILLAMETTE MERIDIAN; THENCE NORTH 233 FEET; THENCE NORTH 87°15' WEST 1255.52 FEET TO THE SOUTHEAST CORNER OF THE TRACT HEREBY CONVEYED; THENCE NORTH 420 FEET ALONG THE WEST LINE OF LOT 4, TUALATIN ORCHARD TRACTS, TO THE SOUTH LINE OF TRACT CONVEYED BY DEED TO GEORGE ANDREWS, ET AL, IN BOOK 70, PAGE 374, RECORDED DECEMBER 27, 1905; THENCE NORTH 87°15' WEST 990.32 FEET ALONG THE SOUTH LINE OF SAID ANDREWS TRACT; THENCE SOUTH 420 FEET ALONG THE EAST LINE OF LOT 1, TUALATIN ORCHARDS TRACTS; THENCE SOUTH 87°15' EAST 990.32 FEET TO THE SOUTHEAST CORNER OF PROPERTY HEREBY CONVEYED.

## PARCEL VI:

BEGINNING AT THE NORTHEAST CORNER OF TRACT 1, TUALATIN ORCHARD TRACTS, A DULY RECORDED SUBDIVISION IN SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST, WILLAMETTE MERIDIAN, WASHINGTON COUNTY, OREGON; THENCE SOUTH 87°15' EAST 207.5 FEET TO THE POINT OF TRUE BEGINNING OF THIS DIRECTION; THENCE SOUTH PARALLEL TO THE EAST LINE OF SAID TRACT 1, TUALATIN ORCHARD TRACTS, AND 207.5 FEET EASTERLY THEREFROM 420.0 FEET TO A POINT; THENCE SOUTH 87°15' EAST 90 FEET TO A POINT; THENCE NORTH PARALLEL TO THE EAST LINE OF SAID TRACT 1, 420.0 FEET; THENCE NORTH 87°15' WEST 90 FEET TO THE POINT OF TRUE BEGINNING OF THIS DESCRIPTION.

## PARCEL VII:

A TRACT OF LAND IN THE SOUTHEAST 1/4 OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST, WILLAMETTE MERIDIAN, WASHINGTON COUNTY, OREGON, MORE PARTICULARLY DESCRIBED AS FOLLOWS:

BEGINNING AT THE SOUTHWEST CORNER OF LOT 12, TUALATIN ORCHARD TRACTS; THENCE NORTH 89°44'43" EAST 1159.47 FEET; THENCE NORTH 3°00'17" WEST 880.00 FEET TO A POINT ON A LINE EXTENDED FROM THE NORTHEAST CORNER OF LOT 1, TUALATIN ORCHARD TRACTS TO THE NORTHWEST CORNER OF LOT 4, TUALATIN ORCHARD TRACTS, SAID POINT FALLING NORTH 89°44'43" EAST 686.11 FEET FROM THE NORTHEAST CORNER OF SAID LOT 1 AND BEING THE TRUE POINT OF BEGINNING; THENCE SOUTH 3°00'17" EAST 420.00 FEET TO A POINT ON THE NORTH RIGHT OF WAY LINE OF GREENHILL LANE; THENCE WESTERLY ALONG SAID RIGHT OF WAY LINE SOUTH 89°44'43" WEST 389.06 FEET; THENCE NORTH 3°00'17" WEST 420.00 FEET; THENCE NORTH 89°44'43" EAST 389.06 FEET TO THE TRUE POINT OF BEGINNING.

PARCEL VIII:

A TRACT OF LAND IN THE SOUTHEAST 1/4 OF SECTION 35, TOWNSHIP 2 SOUTH, RANGE 1 WEST, WILLAMETTE MERIDIAN, WASHINGTON COUNTY, OREGON, MORE PARTICULARLY DESCRIBED AS FOLLOWS:

BEGINNING AT THE SOUTHWEST CORNER OF LOT 12, TUALATIN ORCHARD TRACTS; THENCE NORTH 89°44'43" EAST 1159.47 FEET; THENCE NORTH 3°00'17" WEST 880.00 FEET TO A POINT ON A LINE EXTENDED FROM THE NORTHEAST CORNER OF LOT 1, TUALATIN ORCHARD TRACTS TO THE NORTHWEST CORNER OF LOT 4, TUALATIN ORCHARD TRACTS, SAID POINT FALLING NORTH 89°44'43" EAST 686.11 FEET FROM THE NORTHEAST CORNER OF SAID LOT 1 AND BEING THE TRUE POINT OF BEGINNING; THENCE NORTH 89°44'43" EAST 763.79 FEET TO A POINT ON THE WESTERLY RIGHT OF WAY OF THE BALDOCK FREEWAY; THENCE SOUTH 15°49'15" WEST 436.59 FEET ALONG SAID RIGHT OF WAY TO THE NORTH RIGHT OF WAY LINE OF GREENHILL LANE; THENCE WESTERLY ALONG SAID RIGHT OF WAY SOUTH 89°44'43" WEST 622.75 FEET; THENCE NORTH 3°00'17" WEST 420.00 FEET TO THE TRUE POINT OF BEGINNING.



# FIRST AMERICAN TITLE Property Research Report

## **SUBJECT PROPERTY**

R560164  
2S135D000100  
Washington

## **OWNER**

P3 Properties LLC  
By Paul Pennington

## **DATE PREPARED**

04/02/2020

## **PREPARED BY**

samaya@firstam.com



*First American Title*

Customer Service 503.219.8746  
cs.oregon@firstam.com

©2018 First American Financial Corporation and/or its affiliates.

All rights reserved. | NYSE: FAF | 39203000418



**First American Title™**

Customer Service Department

Phone: 503.219.TRIO (8746)

Fax: 503.790.7872

Email: cs.oregon@firstam.com

Date: 4/2/2020

### OWNERSHIP INFORMATION

Owner: P3 Properties LLC

CoOwner: By Paul Pennington

Site: OR 97062

Mail: PO Box 691 White Salmon WA 98672

Parcel #: R560164

Ref Parcel #: 2S135D000100

TRS: 02S / 01W / 35 / SE

County: Washington

### PROPERTY DESCRIPTION

Map Grid: 715-E1

Census Tract: 032110 Block: 1004

Neighborhood: Cpo 5 Sherwood-Tualatin S1

School Dist: 88J Sherwood

Impr Type:

Subdiv/Plat:

Land Use: 6404 - Designated Forestland - Vacant - Rural  
Residential

Std Land Use: OTHR - Other

Zoning: Tualatin-RML - Medium-Low Density Residential

Lat/Lon: 45.35193877 / -122.76768864

Watershed: Fanno Creek-Tualatin River

Legal: ACRES 25.18, FORESTLAND-POTENTIAL  
ADDITIONAL TAX LIABILITY

### ASSESSMENT AND TAXATION

Market Land: \$0.00

Market Impr: \$0.00

Market Special: \$1,948,650.00

Market Total: \$1,948,650.00 (2019)

% Improved: 0.00%

Assessed Total: \$12,050.00 (2019)

Levy Code: 88.13

Tax: \$186.50 (2019)

Millage Rate: 15.4786

Exemption:

Exemption Type:

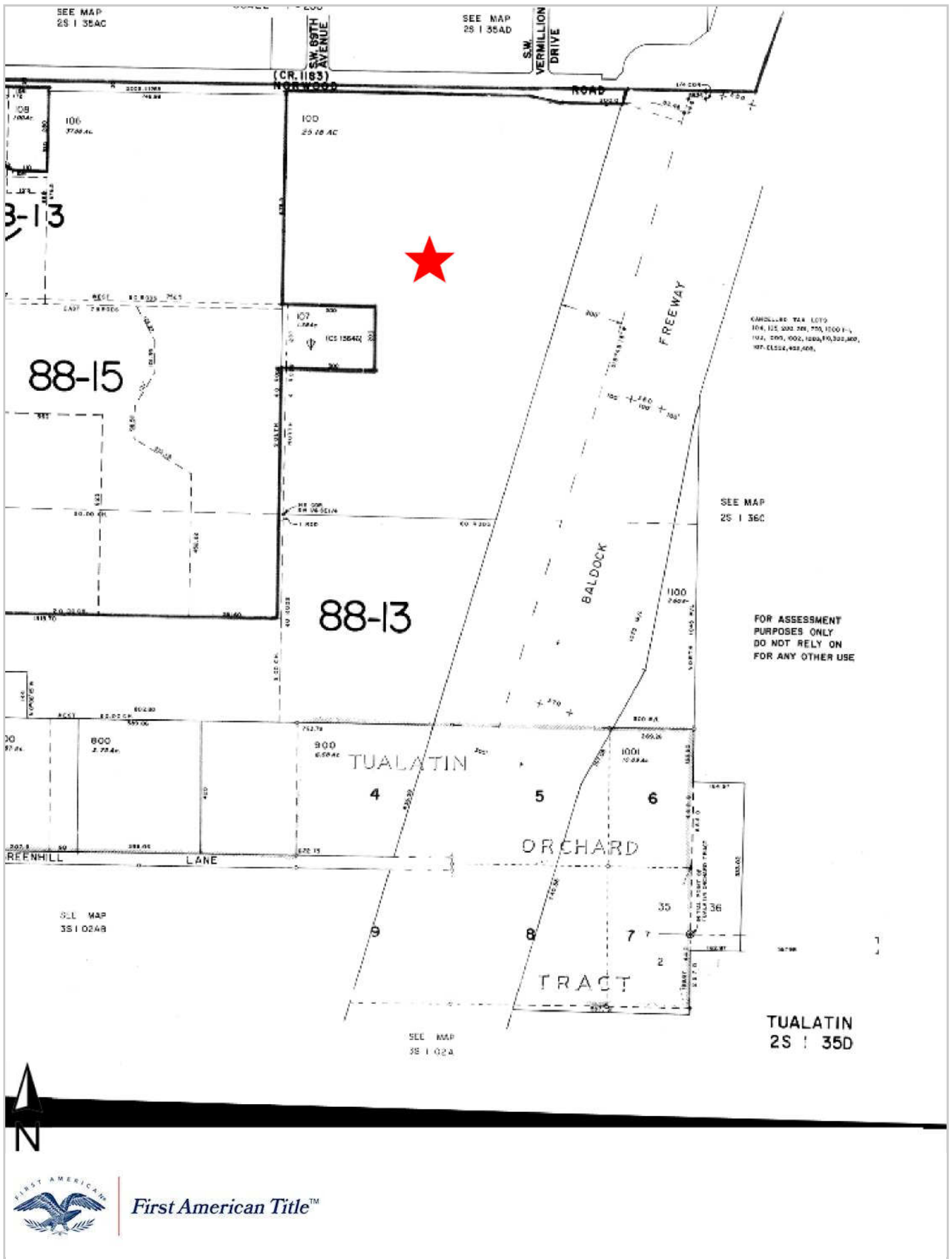
### PROPERTY CHARACTERISTICS

Bedrooms:	Total SqFt:	Year Built:
Baths, Total:	First Floor:	Eff Year Built:
Baths, Full:	Second Floor:	Lot Size Ac: 25.18 Acres
Baths, Half:	Basement Fin:	Lot Size SF: 1,096,841 SqFt
Total Units: 1	Basement Unfin:	Lot Width:
# Stories:	Basement Total:	Lot Depth:
# Fireplaces:	Attic Fin:	Roof Material:
Cooling:	Attic Unfin:	Roof Shape:
Heating:	Attic Total:	Ext Walls: Wood
Building Style:	Garage:	Const Type:

### SALES AND LOAN INFORMATION

Owner	Date	Doc #	Sale Price	Deed Type	Loan Amt	Loan Type
P3 PROPERTIES LLC	2/25/2015	0000012686		Grant		Conv/Unk
PENNINGTON,PAUL	8/19/2013	0000075740		Quit Claim		
PENNINGTON,PAUL	7/11/2013	0000063209		Quit Claim		
PENNINGTON,DORTHEA	1/8/2013	0000001861		Trust	\$135,000.00	

Sentry Dynamics, Inc. and its customers make no representations, warranties or conditions, express or implied, as to the accuracy or completeness of information contained in this report.



SEE MAP  
25 | 35AC

SEE MAP  
25 | 35AD

(CR. 1183)  
NORTH 1000

SW 69TH AVENUE

SW  
VERMILLION  
DRIVE

3-13

88-15

88-13

TUALATIN

ORCHARD

TRACT

CANCELLED TAX LOTS  
104, 105, 200, 201, 202, 1000-1-1,  
102, 203, 602, 1004, 10, 202, 400,  
907, 10504, 402, 408,

SEE MAP  
25 | 36C

FOR ASSESSMENT  
PURPOSES ONLY  
DO NOT RELY ON  
FOR ANY OTHER USE

SEE MAP  
35 | 024B

SEE MAP  
35 | 024

TUALATIN  
25 | 35D



First American Title™

02/25/2015 11:18:23 AM

D-DBS Cnt=1 Str=12 S PFEIFER  
\$15.00 \$5.00 \$11.00 \$20.00 - Total = \$51.00



02016302201500126860030038

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 County Clerk



15  
36

After recording return to:  
P3 Properties, LLC  
c/o Paul Pennington  
P.O. Box 691  
White Salmon, WA 98672

Until further notice, all tax statements should be sent to:  
P3 Properties, LLC  
c/o Paul Pennington  
P.O. Box 691  
White Salmon, WA 98672

Tax Account No. 2S135D0 00100  
Ref No. R0560164

True actual consideration paid is \$ 0

**BARGAIN AND SALE DEED**

Paul Pennington, Janet Pennington Peterson, and Gay Pennington Paschoal, as equal tenants in common, Grantors, do hereby convey unto P3 Properties, LLC, an Oregon limited liability company, Grantee, all of their right, title, and interest in that certain real property, with the tenements, hereditaments and appurtenances thereunto belonging or in any way appertaining, situated in Washington County, State of Oregon, described as follows, to-wit:

**SEE ATTACHED EXHIBIT "A"**

To have and to hold the same unto the said grantee and grantee's successors and assigns forever.

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: 2/12/2015

Paul Pennington 2/9/2015  
Paul Pennington

Janet Pennington Peterson  
Janet Pennington Peterson

Gay Pennington Paschoal  
Gay Pennington Paschoal

STATE OF Washington )  
County of Klickitat ) §

This instrument was acknowledged before me on 2-9-2015, 2014, by Paul Pennington.

DIANE MURPHY  
NOTARY PUBLIC  
STATE OF WASHINGTON  
COMMISSION EXPIRES  
JUNE 16, 2015

Diane Murphy  
Notary Public for ~~Oregon~~ Washington

STATE OF OREGON )  
County of Benton ) §

This instrument was acknowledged before me on 2/12/2015, by Janet Pennington Peterson.

OFFICIAL STAMP  
MIRANDA ASHLEY HOWARD  
NOTARY PUBLIC-OREGON  
COMMISSION NO. 933427  
MY COMMISSION EXPIRES OCTOBER 28, 2018

Miranda Ashley Howard  
Notary Public for Oregon

STATE OF OREGON )  
County of Washington ) §

This instrument was acknowledged before me on Feb 5, 2015, 2014, by Gay Pennington Paschoal.

OFFICIAL STAMP  
THERESA WEAVER  
NOTARY PUBLIC - OREGON  
COMMISSION NO. 934162  
MY COMMISSION EXPIRES DECEMBER 18, 2018

Theresa Weaver  
Notary Public for Oregon



EXHIBIT "A"

All interest in 25.18 acres of land, located at S.W. Norwood Ave., Tualatin, Oregon 97062, more particularly described as:

The North half of the Northwest quarter of the Southeast quarter and the Northeast quarter of the Southeast quarter of Section 35, Township 2 South, Range 1 West of the Willamette Meridian, in Washington County, Oregon,

EXCEPTING tract conveyed to the State of Oregon, by and through its State Highway Commission, in deed book 325, page 183, as follows: A parcel of land lying in the Northeast quarter of the Southeast quarter of Section 35, T2S, R1W, W.M.; the said parcel being that portion of said Northeast quarter of the Southeast quarter lying Easterly of a line parallel to and 100 feet Westerly of the centerline of the West Portland-Hubbard Highway as said highway has been relocated, which centerline is described as follows:

Beginning at Engineer's centerline Station 349/00, said Station being 115.27 feet North and 78.52 feet East of the East quarter corner of said section 35; thence South 15°49'15" West 1600 feet to Station 365/00; said centerline crossing the East and South lines of said Northeast quarter of the Southeast quarter approximately at Section 351/83 and Station 363/91 respectively;

ALSO EXCEPTING that tract conveyed to the State of Oregon, by and through its State Highway Commission, by deed in book 341, page 233; ALSO EXCEPTING the following described premises: Beginning at an iron bar marking the center of Section 35, T2S, R1W, W.M., Washington County, Oregon; thence South along the West line of the Southeast quarter of said Section 35 to the Southwest corner of tract conveyed to Merle Pennington and Dorthea Pennington by deed of record in book 417 at page 314, Deed Records of Washington County; thence East along the South line of said tract so conveyed 16 rods and 30 feet to a point; thence North parallel to the West line of said Southeast quarter of said Section 35 to the North line of said Southeast quarter of Section 35; thence West along the North line of said Southeast quarter 16 rods and 30 feet to the point of beginning;

ALSO EXCEPTING the following parcels: Parcel conveyed to Shope, described in instrument of record in book 575, page 110, October 13, 1965, Washington County Records; parcel conveyed to School District 88J, described in instrument of record in Book 767, page 495, December 17, 1969, Washington County Records; and parcel conveyed to City of Tualatin described in instrument of record in Book 825, Page 873, 1971, Washington County Records.

Also identified as Washington County Tax Lot 100 on Tax Map 2S135D

## **Exhibit D: Neighborhood Meeting Notes & Materials**

---

## **I. Executive Summary**

Lennar Northwest, Inc. and Venture Properties, Inc. (Applicants) are submitting this application for a Text Amendment to the Tualatin Development Code (TDC) to allow as a permitted use within the Medium-Low Density Residential (RML) zone of the Basalt Creek Planning Area (BCPA) projects over 15 acres containing single-family detached homes on lots averaging 3,000 square feet. This amendment will create a provision for single-family housing that meets the density requirements adopted within the Basalt Creek Concept Plan for the BCPA without adjusting the target densities for the RML District. The full language of the draft Text Amendment is included in Exhibit B.

This amendment will affect approximately 62 acres comprised of Tax Lots 400, 401, 500, 501, 600, 800, and 900 of Washington County Assessor's Map 2S 1 35D, which were recently annexed to the City of Tualatin through annexation petition ANN-19-0002, and Tax Lot 100, currently within unincorporated Washington County but inside the City of Tualatin Urban Growth Boundary (UGB). Tax Lot 100 is zoned Future Development 20-Acre (FD-20) and will be zoned RML upon its annexation to the City of Tualatin. To provide needed housing, the applicants plan to submit residential subdivision applications in the future for these properties.

While the TDC permits only attached housing units of apartments, duplexes, and triplexes, and for-sale townhomes in the RML zone, the allowed density range of 8-10 dwelling units per net acre is ideal for small-lot, single-family development, especially in large developments with varied lots and land uses. The City currently offers a Small Lot Subdivision process through a Conditional Use Permit; however, this process is highly discretionary, is of limited use since it is only permitted for tree preservation (per TDC 35.410.1.b), and the development standards do not allow lot variability.

Lot size averaging throughout a subdivision allows more diversity in lot size and housing style to meet the varied needs of homebuyers and give neighborhoods character. The current Small Lot Subdivision development standards do not allow for lot size averaging and instead require a minimum lot size of 4,500 square feet, effectively preventing developments from meeting the maximum allowed density (at 10 units per acre, lots will average to 4,356 square feet). Further, these standards allow only 45 percent building coverage, do not allow for lot widths under 50 feet or 30 feet on a cul-de-sac bulb, and require greater corner setbacks from both street-facing lot lines of corner lots. Wide lots, as required by the Small Lot Subdivision code, increase lot costs with little benefit for the homebuyer. Small-lot subdivisions also typically require greater building coverage in order to accommodate single-family detached houses.

According to the City's 2019 Housing Needs Analysis (HNA), the City of Tualatin currently provides a healthy mix of single-family and multi-family housing, with a stock of approximately 53 percent single-family detached and 41 percent multi-family units. Notably, the City's HNA demonstrates that the City provides a larger share of multi-family housing than Washington County and the Portland region as a whole and more single-family attached housing than the regional average. Only six percent of housing stock within the City is provided as single-family attached housing. Attached housing has been viewed as a more affordable option for home ownership; however, small-lot detached homes can reach the same price range as attached homes and are in greater demand by the market.

For RML zoning to be effective, a mixture of feasible housing alternatives must be provided. Broadening the RML zone to include small-lot single-family homes will provide a viable medium-density alternative

with lower home prices. Attached housing projects perform better on smaller development sites adjacent to urban services. The two projects planned by the applicants in the BCPA contain approximately 58 acres of RML land which could accommodate 329 to 412 dwelling units at current densities. This scale of townhouse project cannot be found even in light rail districts around the Metro region and the applicant's project areas are not served by walkable services that are desired by attached housing buyers.

The proposed text amendment maintains the existing allowed uses and overall project densities established in the RML zone while allowing for lot-size averaging, opening opportunities for small-lot single-family homes on large project sites, as well as amenities such as shared open space. The proposed amendments contribute to the flexibility and variety of housing available within the City while meeting the city's projected housing density needs and avoiding repeated lots and housing types.

The Text Amendment proposed is consistent with relevant goals and policies within the City of Tualatin's Comprehensive Plan and HNA. The proposal satisfies the applicable approval criteria for Text Amendments outlined within the Tualatin Development Code. This application includes the City application forms and written materials necessary for City staff to review and determine compliance with the applicable approval criteria. The evidence is substantial and supports the City's approval of the application.

# Instructions for Joining & Participating in the Public Neighborhood Meeting for the Basalt Creek Text Amendment

Virtual Meeting provided via Zoom Webinar

**Wednesday, June 10, 2020 at 6:00 PM PST**

## Please Register in Advance

### (a list of attendees must be submitted to the City):

- Go to [www.aks-eng.com/basalt-creek/](http://www.aks-eng.com/basalt-creek/) and follow the link to register.
- Complete the online registration form.
- You will receive a confirmation email containing a link to join the Zoom webinar at the scheduled time as well as additional instructions.
- Meeting materials will be available at [www.aks-eng.com/basalt-creek/](http://www.aks-eng.com/basalt-creek/) two days prior to the meeting and at least 10 days after the meeting concludes.

## How to Join the Meeting:

### Join by computer, tablet, or smartphone

- **This is the preferred method as it allows you to see the Presenter's materials on screen.**
- Click on the "Click Here to Join" link provided in your registration confirmation email.
- (If you registered at [www.aks-eng.com/basalt-creek/](http://www.aks-eng.com/basalt-creek/) but did not receive a confirmation email, please check your junk/spam folder before contacting the Meeting Administrator.)
- You may be prompted to "download and run Zoom" or to install the App (ZOOM cloud meetings). Follow the prompts or bypass this process by clicking "join from your browser".
- You should automatically be connected to the virtual neighborhood meeting.

### Join by telephone

- Dial any of the toll-free Zoom numbers below to connect to the neighborhood meeting:

+1-669-900-6833	+1-346-248-7799
+1-929-205-6099	+1-253-215-8782
+1-301-715-8592	+1-312-626-6799

- If you experience trouble connecting, please pick another number and try again.
- After dialing in, enter this Zoom ID when prompted: **846 1305 9620**
- The Password if needed is: **6151**

#### **MEETING ADMINISTRATOR:**

For technical assistance or to submit a question for the meeting:

Email [mimid@aks-eng.com](mailto:mimid@aks-eng.com)

## During the Meeting

### **Audio Help**

- Meeting attendees will be muted throughout the presentation. This will allow everyone to hear the presentation clearly without added distractions.
- Make sure that the speakers on your device are turned on and not muted.
- If you do not have speakers on your computer, you can join by phone (using the “Join by telephone” instructions) to hear the presentation while watching the presentation on your computer monitor.

### **Questions & Answers**

Your questions are important to us. There will be time reserved during the meeting to take questions, using one of the submission options below. Our presentation team will make their best effort to answer all question(s) during the meeting.

#### **Prior to the Meeting:**

- You can Email your question(s) in advance to the Meeting Administrator.  
Email [mimid@aks-eng.com](mailto:mimid@aks-eng.com)

#### **During the Meeting:**

- **Preferred Method:** Use the “Q&A” button on the bottom of the presentation screen to submit a question in real time.
- Email your question to the Meeting Administrator:  
Email [mimid@aks-eng.com](mailto:mimid@aks-eng.com)

#### **After the Meeting:**

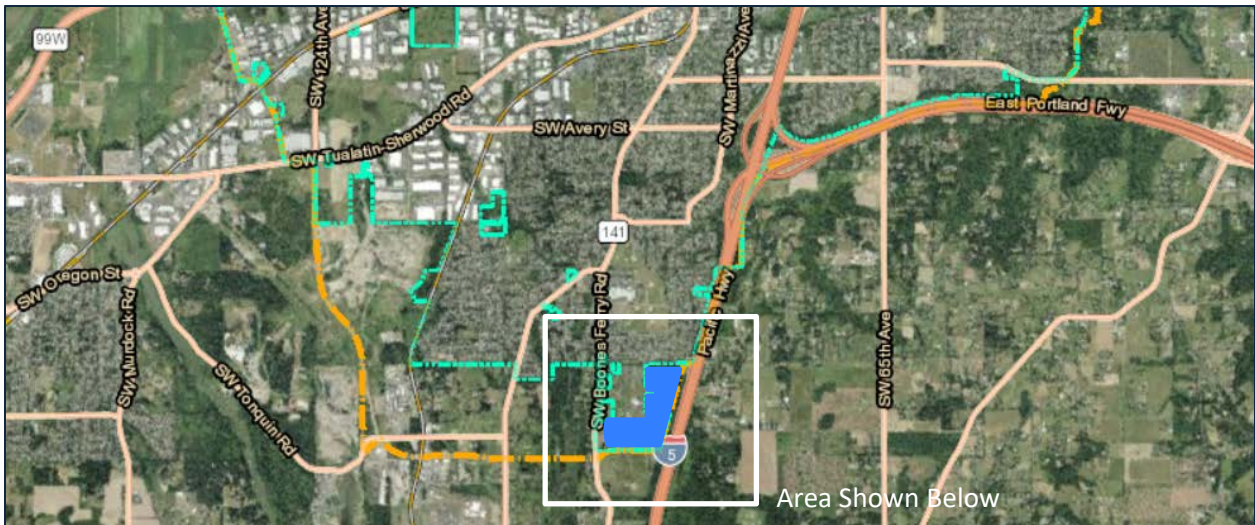
- We will continue to take questions after the meeting has ended. Please submit your question(s) to the Meeting Administrator:  
Email [mimid@aks-eng.com](mailto:mimid@aks-eng.com)
- All questions received after the meeting and prior to midnight on June 2, 2020 will be answered in an email to all registered meeting participants by end of business the following day.

## Helpful Hints/Troubleshooting

**We want to start on time! Please join the meeting 5-10 minutes prior to the 6:00 PM start time to ensure successful connection.**

- You do not need a Zoom account to join the meeting.
- You will need a valid email address at the time of registration to receive the confirmation email and link to join the webinar or receive answers to any questions submitted after the meeting.
- For first-time Zoom users, we recommend downloading and installing the Zoom App well in advance, by clicking on the “Click Here to Join” link in your confirmation email.
- For technical assistance, please contact the Meeting Administrator (contact above).
- If you have difficulties connecting by computer, tablet, or smartphone, we suggest disconnecting and instead use the “Join by telephone” instructions to listen in.

# Potentially Affected Properties



**TDC 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	C/P	Limited to single-family dwellings in a small lot subdivision, with conditional use permit, subject to TDC 36.410. Permitted within the Basalt Creek Planning Area subject to TDC 41.330.
Accessory Dwelling Unit	P	Subject to TDC 34.600.
Duplex		
Townhouse (or Rowhouse)	P	See TDC definition in 31.060.
Multi-Family Structure	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.

**TDC 41.300. - Development Standards.**

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).

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

STANDARD	REQUIREMENT	LIMITATIONS AND CODE REFERENCES
<b>MAXIMUM DENSITY</b>		
Household Living Uses	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	
<b>MINIMUM LOT SIZE</b>		
Townhouse (or Rowhouse)	1,400 square feet	
Multi-Family Structure and Duplex		
• Development on Less than One Acre	10,000 square feet	For up to two units, plus an additional 4,195 square feet for each unit exceeding two.



• Development on More than One Acre	4,356 square feet per unit	
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
<b>MINIMUM AVERAGE LOT WIDTH</b>		
Townhouse (or Rowhouse)	14 feet	
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.
<b>MINIMUM SETBACKS</b>		
Front Setback		Minimum setback to a garage door must be 20 feet.
• 1 story structure	20 feet	
• 1.5 story structure	25 feet	
• 2 story structure	30 feet	
• 2.5 story structure	35 feet	
• Townhouse (or Rowhouse)	0-20 feet	As determined through Architectural Review process.
Side and Rear Setback		Where living spaces face a side yard, the minimum setback must be ten feet
• 1 story structure	5 feet	
• 1.5 story structure	7 feet	
• 2 story structure	10 feet	
• 2.5 story structure	12 feet	
Corner Lots	—	On corner lots, the setback is the same as the front yard setback on any side facing a street other than an alley.
Minimum Distance Between Buildings within One Development	10 feet	For Townhouses, determined through the Architectural Review process
Parking and Vehicle Circulation Areas	10 feet	For Townhouses, determined through the Architectural Review process
Conditional Uses	—	As determined through Architectural Review process. No minimum setback must be greater than 50 feet
Any Yard Area Adjacent to Basalt Creek Parkway	50 feet	
<b>MAXIMUM STRUCTURE HEIGHT</b>		
All Uses	35 feet	May be increased to a maximum of 50 feet with a conditional use permit, if all setbacks are not less than 1½ times the height of the building.

<b>MAXIMUM LOT COVERAGE</b>		
Townhouse (or Rowhouse)	90%	
All Other Permitted Uses	40%	
Conditional Uses	45%	

### **TDC 41.330. - Development Standards.**

Development standards for Household Living Uses in the RML zone within the Basalt Creek Planning Area are listed in Table 41-4. The standards of TDC 41.330 apply to RML-zoned properties within the Basalt Creek Planning Area with project sites which are greater than 15 acres in size. Additional standards may apply to some uses and situations, see TDC 41.310.

**Table 41-4  
Development Standards in the RML Zone within the Basalt Creek Planning Area**

<b>STANDARD</b>	<b>REQUIREMENT</b>	<b>LIMITATIONS AND CODE REFERENCES</b>
<b>MAXIMUM DENSITY</b>		
Household Living Uses	10 units per acre	
<b>MINIMUM AVERAGE LOT SIZE</b>		
Single Family Lot	3,000 square feet	
<b>MINIMUM AVERAGE LOT WIDTH</b>		
Single Family Detached Lot	26 feet	
Townhouse (or Rowhouse)	14 feet	
Flag Lots	—	Must be sufficient to comply with minimum access requirements of TDC 73C.
<b>MINIMUM SETBACKS</b>		
Front Setback		
• building	10 feet	
• garage	20 feet	
Side Setback	5 feet	Where living spaces face a side yard, the minimum setback must be ten feet
Rear Setback	10 feet	
Street side setback	10 feet	
Any Yard Area Adjacent to Basalt Creek Parkway	50 feet	
<b>MAXIMUM STRUCTURE HEIGHT</b>		
All Uses	35 feet	May be increased to a maximum of 50 feet with a conditional use permit, if all setbacks are not less than 1½ times the height of the building.
<b>MAXIMUM LOT COVERAGE</b>		
Single Family Detached Lot	55%	
Townhouse (or Rowhouse)	90%	

The meeting  
will start  
shortly...

Visit

If you haven't already, please visit [www.aks-eng.com/basalt-creek](http://www.aks-eng.com/basalt-creek) to register for this event.

Call

If you are having audio difficulties, please call +1-253-215-8782

Zoom ID **846 1305 9620**, Password **6151**

OR one of the telephone numbers listed on the Virtual Meeting Instructions sheet at the above website.

Submit

You can submit questions by typing them into the **Group Chat Box** – they will go directly to the Meeting Moderator. Questions will be answered after the presentation.

During the Question/Answer period, you can also **“Raise Your Hand”** to be called on to provide your questions and comments.

# Basalt Creek Text Amendment Neighborhood Meeting

Wednesday, June 10, 2020



**12965 SW Herman Road, Suite 100  
Tualatin, OR 97062  
(503) 563-6151**

# Introductions

## Applicants

### **Lennar Northwest, Inc.**

Michael Anders, Director of Land Acquisition  
David Force, Forward Planning Manager

### **Venture Properties, Inc.**

Kelly Ritz, President  
Al Jeck, Project Manager

## Land Use and Civil Engineering

### **AKS Engineering and Forestry**

Mimi Doukas, AICP, RLA  
Glen Southerland, AICP

## Property Owners

**P3 Properties, LLC**  
**Autumn Sunrise, LLC**



**VentureProperties**  
INCORPORATED



# What is being proposed?

## **The Applicants are proposing a change to the City of Tualatin's Development Code to allow detached housing.**

- Addition of single-family detached housing as an allowed use in the Residential Medium-Low (RML) District
  - Only in the Basalt Creek Planning Area in the RML zone
  - Only for project sites 15 acres or larger
- Addition of development standards for properties in the Basalt Creek Planning Area
  - Average lot sizing
  - Setback and lot coverage changes for small lots
- **No density changes have been proposed**



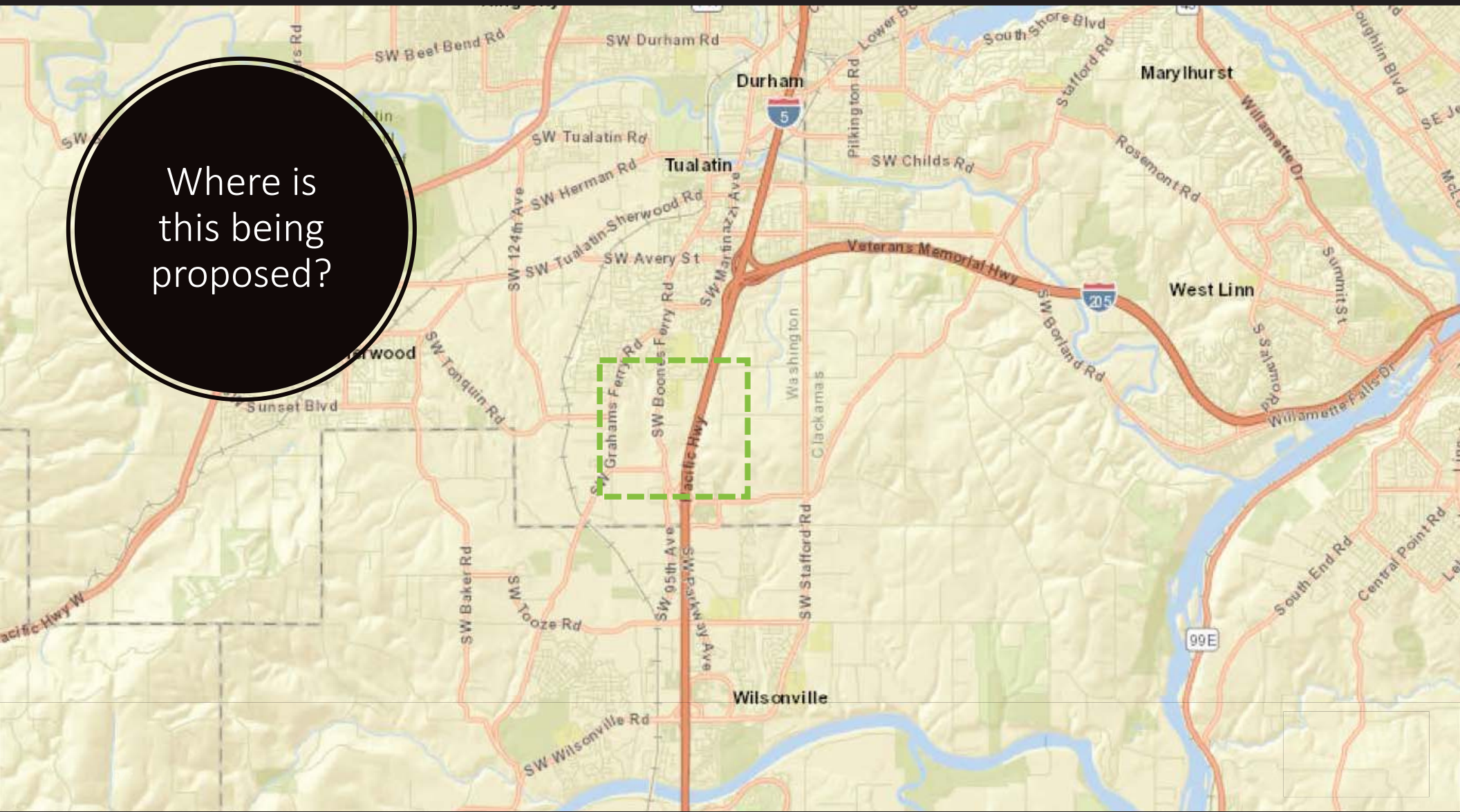
# Why is this being proposed?

## **The existing code doesn't work for these situations, locations, or housing types.**

- Only duplexes, triplexes, townhomes and apartments currently permitted
- Location, project size, and required densities do not work for 100% attached housing/apartments
  - Single-family detached is a better fit for these sites
  - Lot size averaging allows for more housing variety
- Small-Lot Subdivision standards don't work with current code
  - Doesn't match required densities
  - Doesn't allow for lot size averaging
  - Doesn't allow for higher lot coverage
- **No density changes have been proposed**



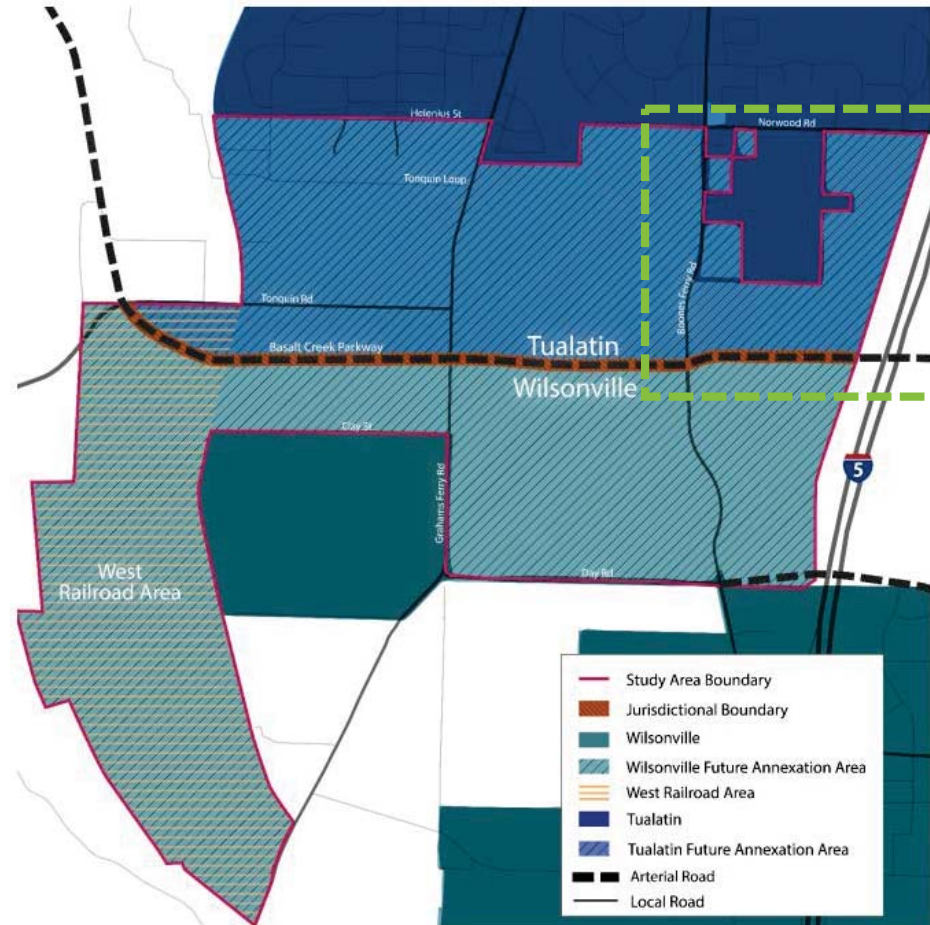
Where is this being proposed?



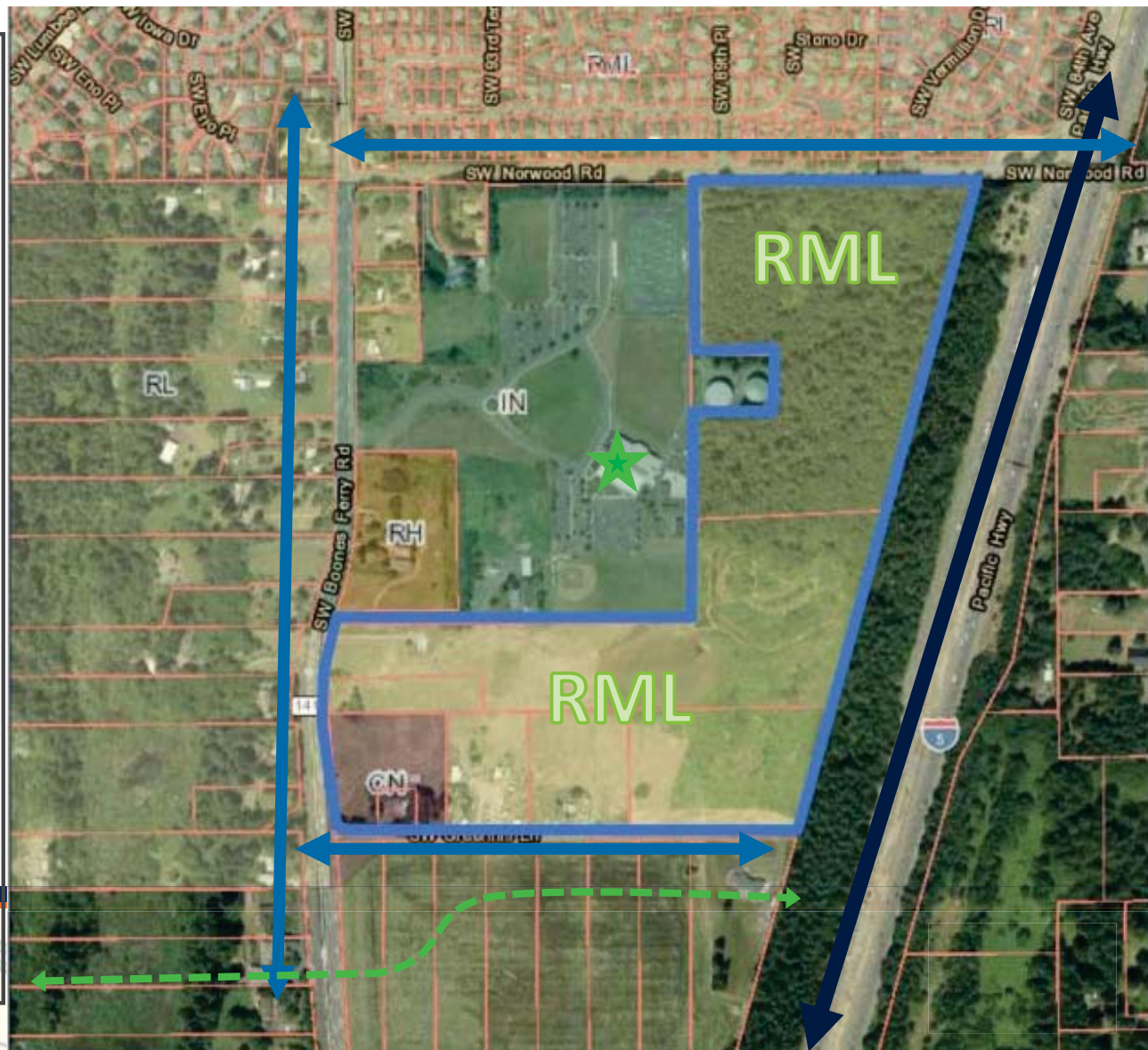


# Basalt Creek Planning Area

Figure 1 Basalt Creek Planning Area and jurisdictional boundaries.



# Basalt Creek Planning Area





6/8/2020

# What does this mean?

## **The Applicants are proposing a change to the City of Tualatin's Development Code.**

- Addition of single-family detached homes as a permitted housing type
- Addition of development standards for properties in the Basalt Creek Planning Area
  - Standards only applied to Plexes/Multi-family currently
  - Lot size averaging
  - Reasonable lot coverage
- **Housing density is not proposed to change**
- **Similar development to surrounding neighborhoods**



# What's in store for this site?

**After the Text Amendment decision, the Applicants will submit land use applications for subdivisions.**



# More Choices in Housing Type

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

HOUSING TYPE	STATUS	LIMITATIONS AND CODE REFERENCES
Single-Family Dwelling	C/P	Limited to single-family dwellings in a small lot subdivision, with conditional use permit, subject to TDC 36.410. Permitted within the Basalt Creek Planning Area subject to TDC 41.330.
Accessory Dwelling Unit	P	Subject to TDC 34.600.
Duplex		
Townhouse (or Rowhouse)	P	See TDC definition in 31.060.
Multi-Family Structure	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.

### **TDC 41.300. - Development Standards.**

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).

# Housing That Fits the Needs of the Area

Table 41-3  
Development Standards in the RML Zone

STANDARD	REQUIREMENT	LIMITATIONS AND CODE REFERENCES
<b>MAXIMUM DENSITY</b>		
Household Living Uses	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	
<b>MINIMUM LOT SIZE</b>		
Townhouse (or Rowhouse)	1,400 square feet	
Multi-Family Structure and Duplex		
<ul style="list-style-type: none"> <li>Development on Less than One Acre</li> </ul>	10,000 square feet	For up to two units, plus an additional 4,195 square feet for each unit exceeding two.
<ul style="list-style-type: none"> <li>Development on More than One Acre</li> </ul>	4,356 square feet per unit	
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
<b>MINIMUM AVERAGE LOT WIDTH</b>		
Townhouse (or Rowhouse)	14 feet	
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.

# Housing That Fits the Needs of the Area

MINIMUM SETBACKS		
Front Setback		Minimum setback to a garage door must be 20 feet.
• 1 story structure	20 feet	
• 1.5 story structure	25 feet	
• 2 story structure	30 feet	
• 2.5 story structure	35 feet	
• Townhouse (or Rowhouse)	0-20 feet	As determined through Architectural Review process.
Side and Rear Setback		Where living spaces face a side yard, the minimum setback must be ten feet
• 1 story structure	5 feet	
• 1.5 story structure	7 feet	
• 2 story structure	10 feet	
• 2.5 story structure	12 feet	
Corner Lots	—	On corner lots, the setback is the same as the front yard setback on any side facing a street other than an alley.
Minimum Distance Between Buildings within One Development	10 feet	For Townhouses, determined through the Architectural Review process
Parking and Vehicle Circulation Areas	10 feet	For Townhouses, determined through the Architectural Review process
Conditional Uses	—	As determined through Architectural Review process. No minimum setback must be greater than 50 feet
Any Yard Area Adjacent to Basalt Creek Parkway	50 feet	
MAXIMUM STRUCTURE HEIGHT		
All Uses	35 feet	May be increased to a maximum of 50 feet with a conditional use permit, if all setbacks are not less than 1½ times the height of the building.

MAXIMUM LOT COVERAGE		
Townhouse (or Rowhouse)	90%	
All Other Permitted Uses	40%	
Conditional Uses	45%	



# Housing That Fits the Needs of the Area

## TDC 41.330. - Development Standards.

Development standards for Household Living Uses in the RML zone within the Basalt Creek Planning Area are listed in Table 41-4. The standards of TDC 41.330 apply to RML-zoned properties within the Basalt Creek Planning Area with project sites which are greater than 15 acres in size. Additional standards may apply to some uses and situations, see TDC 41.310.

**Table 41-4  
Development Standards in the RML Zone within the Basalt Creek Planning Area**

STANDARD	REQUIREMENT	LIMITATIONS AND CODE REFERENCES
<b>MAXIMUM DENSITY</b>		
Household Living Uses	10 units per acre	
<b>MINIMUM AVERAGE LOT SIZE</b>		
Single Family Lot	3,000 square feet	
<b>MINIMUM AVERAGE LOT WIDTH</b>		
Single Family Detached Lot	26 feet	
Townhouse (or Rowhouse)	14 feet	
Flag Lots	—	Must be sufficient to comply with minimum access requirements of TDC 73C.
<b>MINIMUM SETBACKS</b>		
Front Setback		
• building	10 feet	
• garage	20 feet	
Side Setback	5 feet	
Rear Setback	10 feet	
Street side setback	10 feet	
Any Yard Area Adjacent to Basalt Creek Parkway	50 feet	
<b>MAXIMUM STRUCTURE HEIGHT</b>		
All Uses	35 feet	May be increased to a maximum of 50 feet with a conditional use permit, if all setbacks are not less than 1½ times the height of the building.
<b>MAXIMUM LOT COVERAGE</b>		
Single Family Detached Lot	55%	
Townhouse (or Rowhouse)	90%	

# The Process



# Questions Received So Far

**Q:**

**A:**



# Questions?

**Mimi Doukas, AICP, RLA**  
AKS Engineering & Forestry  
12965 SW Herman Road, Suite 100  
Tualatin, OR 97068  
[MimiD@aks-eng.com](mailto:MimiD@aks-eng.com)  
(503) 563-6151

You can submit questions by typing them into the **Group Chat Box** – they will go directly to the Meeting Moderator.

Press **“Raise Your Hand”** to be called on to provide your questions and comments.

# Housing That Fits the Needs of the Area

- (b) *RML Zone*. In the RML zone, small lot subdivisions must comply with the following:
- (i) Small lots must be no less than 4,500 square feet;
  - (ii) Maximum building coverage must not exceed 45 percent;
  - (iii) Minimum lot width must be at least 30 feet. Lots that have frontage on a public street must have a minimum lot width of 50 feet or 30 feet for lots on a cul-de-sac bulb. For flag lots, the minimum lot width at the street must be sufficient to comply with at least the minimum access requirements contained in TDC [73C](#);
  - (iv) Front yard setback must be a minimum of 20 feet to the garage and 12 feet to the house;
  - (v) Side yard setback must be a minimum of five feet;
  - (vi) On corner lots, the setback for yards adjacent to streets must be a minimum of 20 feet to the garage and 12 feet to the house in the yard where a driveway provides access to a street other than an alley and must be a minimum of 12 feet in the yard where no driveway access exists; and
  - (vii) Rear yard setback must be a minimum of 15 feet.

6/3/2020



**BEND, OR**  
2777 NW Lolo Drive, Suite 150  
Bend, OR 97703  
(541) 317-8429  
www.aks-eng.com

**KEIZER, OR**  
3700 River Road N, Suite 1  
Kelzer, OR 97303  
(503) 400-6028

**TUALATIN, OR**  
12965 SW Herman Road, Suite 100  
Tualatin, OR 97062  
(503) 563-6151

**VANCOUVER, WA**  
9600 NE 126<sup>th</sup> Avenue, Suite 2520  
Vancouver, WA 98682  
(360) 882-0419

**Date:** 6/16/2020  
**To:** City of Tualatin Planning Department  
**From:** Mimi Doukas, AICP, RLA – AKS Engineering & Forestry, LLC  
**Project Name:** PTA 20-0003 – Basalt Creek Text Amendment  
**AKS Job No.:** 7454  
**Subject:** Basalt Creek Text Amendment Neighborhood/Developer Meeting Notes

---

**Neighborhood/Developer Meeting Date/Time: June 10, 2020, 6:00 P.M.**

Meeting started at 6:00 P.M. Presentation began at 6:05 P.M.

Mimi Doukas gave an overview of the project and then took questions.

Questions/Comments accepted verbally from neighbors, in text from meeting chat, and prior to meeting by email.

**Attendee Question/Comment Summary**

**Attendee Verbal Question/Comments**

- Tom Knudsen:** Are there any zero-clearance lot lines planned?  
**Mimi Doukas:** No, application is for detached homes with 5-foot side setbacks.
- Jordan Fox Inhofe:** Concerned as an outdoor educator about impacts on area environment and what measures will be taken to prevent environmental impacts.  
**Mimi Doukas:** The Basalt Creek Plan inventoried and mapped natural resource areas for protection. Clean Water Service standards will protect any defined resources.  
**Jordan Cox Inhofe:** Have any confederated tribes been notified of this application?  
**Mimi Doukas:** Not for this kind of application.
- Charles Pitt:** Can you provide a percentage of single-family/townhomes/apartments that will be built?  
**Mimi Doukas:** The developers would like to construct just single-family detached housing.
- Katie Stimson:** Where can I find the traffic impact analysis for Basalt Creek?  
**Mimi Doukas:** That can be found within the 20-year plan for the area, the Basalt Creek Concept Plan. For each subdivision application, a build out study will be prepared, but those analyses have not been created yet.
- Grace Lucini:** Is Lennar Homes the developer for the Autumn Sunrise site? What is the anticipated date for the hearing by the Council or other public hearings?  
**Mimi Doukas:** Yes. Not yet, once the application is deemed complete there will be a better sense of timing.  
**Grace Lucini:** Do you provide a notice to interested persons?  
**Mimi Doukas:** If you received notice of this meeting tonight, you should receive a letter from them notifying you of when the hearing will be. The City has a procedure for informing neighbors. You will see a similar sign on the site for that meeting.

**Grace Lucini:** Many neighbors of the site are not residents of the City. Is there a process for involvement other than the CIO?

**Mimi Doukas:** There is not a residency requirement for participating in a public hearing. Any interested party can participate.

6. **Randy Welborn:** Who is responsible for paying for any needed traffic improvements?

**Mimi Doukas:** That is the responsibility of the developer. They would create the impact and be responsible for the mitigation.

**Randy Welborn:** Are the trees being removed along the I-5 corridor? Will there be a buffer of trees for a sound barrier?

**Mimi Doukas:** The trees in the ODOT right-of-way will remain. The requirements for building infrastructure and making sure that the lots are stable make it extremely difficult to preserve trees. We need to make sure that preserved trees are safe and take that seriously, but it is hard to save trees and do it in a safe way. Norwood will need to be widened, so there will be impacts to the roadway as well.

**Randy Welborn:** Will both sides of the roadway be widened?

**Mimi Doukas:** We are not sure at this point.

7. **Tom Knudsen:** It would be nice to have signs located where people can park and read them.

**Mimi Doukas:** There are City requirements for posting locations and number.

8. **Jordan Cox Inhofe:** Would like more information about the tree removal to be noted in future applications.

**Mimi Doukas:** The tree removal will be noted as part of the subdivision application.

9. **Grace Lucini:** What are the on-street parking impacts of smaller lots?

**Mimi Doukas:** It should be pretty similar to surrounding neighborhoods, with half a stall provided by one lot and half a stall provided by the neighboring lot.

10. **Charles Pitt:** Will this development be similar to Villebois with small lots and alleys behind?

**Mimi Doukas:** This will have small lots, but there is no plan to provide alleyways. The goal is to provide a variety of lot sizes with a minimum average of 3,000 square feet.

11. **Randy Welborn:** Are any green spaces planned?

**Mimi Doukas:** The City doesn't require parks be provided and no addition of a requirement is proposed.

**Randy Welborn:** Where will animals go when construction starts?

**Mimi Doukas:** They will relocate with tree removal and earthmoving.

#### **Attendee Chat Questions**

12. **Roderick French:** How many acres are in each RML parcel?

**Glen Southerland:** There are eight lots affected by the application: Lot 100 is 23.93 acres; Lots 500 and 501, which are included as part of the future projects, but zoned Neighborhood Commercial and not affected by the text amendment, are 4.17 acres; and the Autumn Sunrise RML properties are 33.86 acres.

13. **Daniel Callen:** How much more traffic is expected on Norwood Road going east?

**Mimi Doukas:** No development is proposed with this text amendment. For this proposal, there is no change in traffic because there is no change in density. When the subdivision application comes in, there will be a traffic analysis completed.

14. **Cynthia Rey:** What will be happening with the large trees on Norwood?

**Mimi Doukas:** This was answered earlier.

15. **Tabitha Boschetti:** Provided contact information. Please contact the City if you have any questions.

16. **Daniel Callen:** Where can we learn about upcoming changes to Norwood Road?

**Mimi Doukas:** The traffic study will be completed with the subdivision application and that will determine what changes will be needed.

17. **Cynthia Rey:** The trees will be removed instead of using less space for homes?

**Mimi Doukas:** Without meeting density standards inside cities, the UGBs will need to be expanded. The priority for habitat protection is within riparian corridors.

#### **Emailed Questions & Comments**

18. **Grace Lucini:** Suggested skipping her emailed question because the questions had already been answered. Tabitha agreed.

**Mimi Doukas:** Our contact information is on the screen or you can contact the City if you have any additional questions.

19. **Jo Aust Email:** Will you be leaving a buffer of trees between the development and Norwood and the development and the Interstate?

**Mimi Doukas:** This was answered earlier.

20. **John Lucini Email:** Has there been a stormwater plan developed?

**Mimi Doukas:** Because the density is not changing, the impacts of stormwater should be similar. Stormwater plans will be submitted with a future subdivision application.

**John Lucini Email:** What are the plans to address access and increased traffic?

**Mimi Doukas:** The density is not proposed to change, but this question has been addressed previously.

Materials presented during the meeting and other informational items were uploaded to [www.aks-eng.com/basalt-creek](http://www.aks-eng.com/basalt-creek) greater than two days prior to the Neighborhood/Developer Meeting. These materials will be available on the project website for at least 10 days following the Neighborhood/Developer Meeting.



**Attendee Report**

Report Generated: 6/12/2020 9:25

Topic	Webinar ID	Actual Start Time	Actual Duration (minutes)	# Registered	# Cancelled	Unique Viewers	Total Users	Max Concurrent Views	
Basalt Text Amendment Neighborhood Meeting	846 1305 9620	6/10/2020 17:44		84	34	0	20	34	0

**Host Details**

Attended	User Name	Email	Join Time	Leave Time	Time in Session (minutes)	Country/Region Name
Yes	Mimi Doukas	mimid@aks-eng.com	6/10/2020 17:42	6/10/2020 19:06	84	United States of America

**Panelist Details**

Attended	User Name	Email	Join Time	Leave Time	Time in Session (minutes)	Country/Region Name
Yes	Glen Southerland	southerlandg@aks-eng.com	6/10/2020 18:13	6/10/2020 19:06	53	United States of America
Yes	Glen Southerland	southerlandg@aks-eng.com	6/10/2020 18:14	6/10/2020 19:06	52	United States of America
Yes	Kelly Ritz	Kelly@ventureprop.com	6/10/2020 17:56	6/10/2020 19:06	70	United States of America
Yes	Al Jeck	Al@ventureprop.com	6/10/2020 17:50	6/10/2020 19:06	77	United States of America
Yes	David Force	david.force@lennar.com	6/10/2020 17:49	6/10/2020 19:06	78	United States of America
Yes	David Force	david.force@lennar.com	6/10/2020 17:49	6/10/2020 19:06	77	United States of America

**Attendee Details**

Attended	First Name	Last Name	Email	Registration Time	Approval Status	Join Time	Leave Time	Time in Sessic	Country/Region Name
Yes	Michaela	Zacher	kella@kellazacher.com	6/9/2020 14:19	approved	6/10/2020 17:58	6/10/2020 18:53	55	United States of America
No	Rose	Toler	Rose.toler@gmail.com	6/10/2020 17:22	approved	--	--	--	
Yes	Jordan "River"	Cox Inhofe	neocox98@gmail.com	6/9/2020 21:45	approved	6/10/2020 17:59	6/10/2020 19:06	68	United States of America
Yes	Scott	Mitton	scott.mitton1@gmail.com	6/10/2020 18:04	approved	6/10/2020 18:02	6/10/2020 18:45	44	United States of America
No	Kelly	Ritz	Kelly@stonebridgehomesnw.com	6/10/2020 17:54	approved	--	--	--	
Yes	Spencer	Vetter	spencer@staffordlandcompany.com	6/10/2020 10:34	approved	6/10/2020 17:59	6/10/2020 19:06	68	United States of America
Yes	randy	welborn	rjwelbo@gmail.com	6/10/2020 17:31	approved	6/10/2020 17:58	6/10/2020 19:06	68	United States of America
No	Ken	Aust	kaust@aussiepetmobile.com	5/30/2020 11:35	approved	--	--	--	
No	Jill	Zurschmeide	Jill.zurschmeide@ttsd.k12.or.us	6/5/2020 19:55	approved	--	--	--	
No	Scott	Work	scott.work@comcast.net	6/8/2020 12:31	approved	--	--	--	
Yes	Pam	Yee	syaloha@gte.net	6/7/2020 8:45	approved	6/10/2020 17:59	6/10/2020 18:37	39	United States of America
No	Tabitha	Cooley	tabitha.cooley9717@gmail.com	6/9/2020 21:54	approved	--	--	--	
Yes	daniel	callen	danielwcallen@gmail.com	6/5/2020 16:38	approved	6/10/2020 17:58	6/10/2020 18:48	50	United States of America
No	John	Fronius	john.fronius@gmail.com	5/30/2020 11:57	approved	--	--	--	
Yes	Katie	Stimson	ktstimson23@gmail.com	6/9/2020 21:11	approved	6/10/2020 18:04	6/10/2020 19:06	63	United States of America
No	Cynthia	Ray	Cynthiaray201@gmail.com	6/9/2020 12:37	approved	--	--	--	
No	alisa	bear	alisaabear@gmail.com	6/10/2020 9:31	approved	--	--	--	
Yes	Gary	Newberry	Newthom@q.com	6/8/2020 14:51	approved	6/10/2020 18:03	6/10/2020 18:31	28	United States of America
Yes	Michael	Hergert	micdonherg@gmail.com	6/6/2020 15:30	approved	6/10/2020 17:58	6/10/2020 18:50	52	United States of America
Yes	John	Lucini	jwluci@gmail.com	5/31/2020 15:11	approved	6/10/2020 17:58	6/10/2020 19:06	68	United States of America
No	Rachel	Neill	rachel.neill@icloud.com	5/29/2020 18:30	approved	--	--	--	
Yes	Tabitha	Boschetti	tboschetti@tualatin.gov	5/28/2020 8:40	approved	6/10/2020 17:58	6/10/2020 19:06	68	United States of America
Yes	Tom and Erinn	Stimson	tomstimson88@gmail.com	6/10/2020 17:58	approved	6/10/2020 18:01	6/10/2020 19:06	66	United States of America
Yes	Rhys	Konrad	rhys@macadamforbes.com	6/10/2020 14:54	approved	6/10/2020 17:59	6/10/2020 18:00	2	United States of America
Yes	Rhys	Konrad	rhys@macadamforbes.com			6/10/2020 18:01	6/10/2020 18:31	31	United States of America
Yes	Charles	Pitt	crp58@sbcglobal.net	6/10/2020 18:09	approved	6/10/2020 18:07	6/10/2020 18:13	6	United States of America
Yes	Charles	Pitt	crp58@sbcglobal.net			6/10/2020 18:12	6/10/2020 19:06	54	United States of America
No	Tim	Neary	Timneary@gmail.com	6/1/2020 20:44	approved	--	--	--	
Yes	Debbie	Burchfiel	Ldburch05@hotmail.com	5/29/2020 20:18	approved	6/10/2020 17:58	6/10/2020 18:49	52	United States of America
Yes	Grace	Lucini	GrLuci@gmail.com	5/31/2020 14:38	approved	6/10/2020 17:58	6/10/2020 19:06	68	United States of America
No	Gary	Peterson	petersog1@comcast.net	6/7/2020 15:58	approved	--	--	--	
Yes	Jo	Aust	jojuly12@gmail.com	6/10/2020 18:06	approved	6/10/2020 18:05	6/10/2020 19:06	62	United States of America
Yes	Roderick	French	Rick.french@comcast.net	6/10/2020 17:30	approved	6/10/2020 18:13	6/10/2020 19:06	54	United States of America
No	Don	Redell	don.dredell@frontier.com	6/6/2020 16:14	approved	--	--	--	
No	Danny	O'Neal	DTCME99@comcast.net	5/30/2020 11:09	approved	--	--	--	
Yes	Tom	Knudson	tgk692003@gmail.com	6/4/2020 15:06	approved	6/10/2020 17:59	6/10/2020 19:06	67	United States of America
Yes	Cynthia	Ray	Cynthiaray201@gmail.com	6/10/2020 18:14	approved	6/10/2020 18:14	6/10/2020 19:06	52	United States of America
Yes	Charles	Glaeser		6/10/2020 18:13		6/10/2020 18:13	6/10/2020 19:06	53	United States of America

**Other Attended**

User Name	Join Time	Leave Time	Time in Session (minutes)	Country/Region Name
15416022233	6/10/2020 18:20	6/10/2020 19:06		46 United States of America

19712704435	6/10/2020 18:07	6/10/2020 18:54	48 United States of America
15034755643	6/10/2020 18:03	6/10/2020 18:51	49 United States of America
15036809226	6/10/2020 18:55	6/10/2020 18:56	1 United States of America
Glen Southerland	6/10/2020 17:47	6/10/2020 19:06	80 United States of America

## **Exhibit E: Affidavits of Mailing & Posting**

---

---

## AFFIDAVIT OF MAILING NOTICE

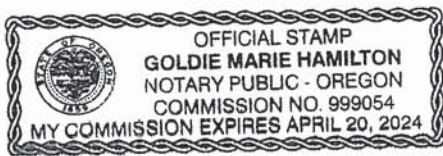
STATE OF OREGON            )  
  ) SS  
COUNTY OF WASHINGTON )

I, Mitchell Godwin being first duly sworn, depose and say:

That on the 27 day of May, 2020, I served upon the persons shown on Exhibit "A" (Mailing Area List), attached hereto and by this reference incorporated herein, a copy of the Notice of Neighborhood/Developer Meeting 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 shown on said Exhibit "A" are their regular addresses as determined from the books and records of the Washington County and/or Clackamas County Departments of Assessment and Taxation Tax Rolls, and that said envelopes were placed in the United States Mail with postage fully prepared thereon.

*Mitchell Godwin*  
Signature

SUBSCRIBED AND SWORN to before me this 29<sup>th</sup> day of May, 2020.



*Goldie Marie Hamilton*  
Notary Public for Oregon  
My commission expires: April 20, 2024

RE: \_\_\_\_\_

**CERTIFICATION OF SIGN POSTING**

<p><b>NOTICE</b></p> <p><b>NEIGHBORHOOD / DEVELOPER MEETING</b></p> <p><u>6/10/2010 6:00 p.m.</u></p> <p><u>aks-eng.com/basalt-creek</u></p> <hr/> <p><u>503-563-6151</u></p>
---

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. The block around the word "NOTICE" must remain **orange** composed of the **RGB color values Red 254, Green 127, and Blue 0**. A PowerPoint template of this sign is available at: <https://www.tualatinoregon.gov/planning/land-use-application-sign-templates>.

---

As the applicant for the SW Norwood Rd + Autumn Creek project, I hereby certify that on this day, May 27 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: Mitchell Godwin  
(Please Print)

Applicant's Signature: Mitch Godwin

Date: 5/29/20

AGHAZADEH-SANAEI MEHDI &  
ASIAEE NAHID  
23745 SW BOONES FERRY RD  
TUALATINOR97062-9640

ALVSTAD RANDALL &  
ALVSTAD KAREN  
23515 SW BOONES FERRY RD  
TUALATINOR97062-9641

ANGIN JONATHAN & BRIDGET TRUST  
PO BOX 2413  
TUALATINOR97062-2413

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGOOR97034-3937

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGOOR97034-3937

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGOOR97034-3937

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGOOR97034-3937

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGOOR97034-3937

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGOOR97034-3937

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGOOR97034-3937

BAZANT CHRISTINE LEE &  
BAZANT JOHN JOSEPH  
36449 HWY 34  
LEBANONOR97355-9682

BOCCI JAMES A &  
BOCCI JULIA A  
23205 SW BOONES FERRY RD  
TUALATINOR97062-9619

BRACKNEY CHRIS  
23355 SW 82ND AVE  
TUALATINOR97062-9613

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATINOR97062-9603

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATINOR97062-9603

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATINOR97062-9603

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATINOR97062-9603

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATINOR97062-9603

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATINOR97062-9603

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATINOR97062-9603

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATINOR97062-9603

CHRISTENSEN MICHAEL A &  
CHRISTENSEN JAMIE L  
23725 SW 82ND AVE  
TUALATINOR97062-9612

DAVIS JAMES HAYES &  
BRANSON-DAVIS NESHIA  
23395 SW 82ND AVE  
TUALATINOR97062-9613

GROSSMAN JEFFERY A  
23605 SW BOONES FERRY RD  
TUALATINOR97062-9641

HICKOK TODD J &  
HICKOK MOLLY J  
23855 SW BOONES FERRY RD  
TUALATINOR97062-9639

HORIZON COMMUNITY CHURCH  
PO BOX 2690  
TUALATINOR97062-2690

LANDCASTER DEVELOPMENT CORPORATI  
6770 SW CANYON DR  
PORTLANDOR97225-3650

LANDCASTER DEVELOPMENT CORPORATI  
6770 SW CANYON DR  
PORTLANDOR97225-3650

LEE DAVID O &  
RAPISARDA DEIDRE  
24245 SW BOONES FERRY RD  
TUALATINOR97062-9621

LUCINI JOHN W & GRACE N FAM TRU  
23677 SW BOONES FERRY RD  
TUALATINOR97062-9641

LYNCH LARRY L &  
LYNCH SUZANNE M  
23185 SW 82ND AVE  
TUALATINOR97062-9635

MAST MARVIN R &  
JELI CARLENE M  
23845 SW BOONES FERRY RD  
TUALATINOR97062-9639

MCKEAN JOHN R &  
MCKEAN LINDA L  
21370 MAKAH CT  
TUALATINOR97062-9309

MCLEOD RANDY FRANKLIN &  
MCLEOD JANINE B  
23465 SW BOONES FERRY RD  
TUALATINOR97062-9642

NGUYEN KHANH T &  
FONG TODD P  
23605 SW 82ND AVE  
TUALATINOR97062-9613

ODOMS LIVING TRUST  
BY JAMES A & LINDA L ODOMS TRS  
PO BOX 2446  
TUALATINOR97062-2446

P3 PROPERTIES LLC  
BY PAUL PENNINGTON  
PO BOX 691  
WHITE SALMONWA98672-0691

POTTER DYLAN D &  
POTTER MICHELLE P  
23405 SW BOONES FERRY RD  
TUALATINOR97062-9642

RE THOMAS J & KATHRYN S  
19035 SW CHESAPEAKE DR  
TUALATINOR97062-7722

RILEY SHAWN O  
23365 SW BOONES FERRY RD  
TUALATINOR97062-9643

ROLISON MIKEL J  
23685 SW 82ND AVE  
TUALATINOR97062-9613

SASAKI ARTHUR O REVOC LIV TRUST  
SASAKI NAMI REVOC LIV TRUST  
10120 SW CENTURY OAK DR  
TIGARDOR97224-4641

SCOTT JOAN D  
PO BOX 2594  
TUALATINOR97062-2594

SHAMBURG SCOTT A &  
SHAMBURG LISA G  
PO BOX 829  
TUALATINOR97062-0829

SINGLETERRY ELNORA  
23535 SW 82ND AVE  
TUALATINOR97062-9613

SLAWIK JON V &  
SLAWIK VAN MY  
23445 SW 82ND AVE  
TUALATINOR97062-9613

SMITH ROBERT D &  
SMITH JANIS K  
13547 SW HILLSHIRE DR  
TIGARDOR97223-5675

TUALATIN CITY OF  
18880 SW MARTINAZZI AVE  
TUALATINOR97062-7092

YACKLEY DIANE M &  
GANNETT TOD C  
23240 SW BOONES FERRY RD  
TUALATINOR97062-9619

RILEY SHAWN O  
23365 SW BOONES FERRY RD  
TUALATIN, OR 97062

POTTER DYLAN D &  
POTTER MICHELLE P  
23405 SW BOONES FERRY RD  
TUALATIN, OR 97062

MCLEOD TRUST  
BY RANDY F & JANINE B MCLEOD TRS  
23465 SW BOONES FERRY RD  
TUALATIN, OR 97062

ALVSTAD RANDALL &  
ALVSTAD KAREN  
23515 SW BOONES FERRY RD  
TUALATIN, OR 97062

GROSSMAN JEFFERY A  
23605 SW BOONES FERRY RD  
TUALATIN, OR 97062

AGHAZADEH-SANAEI MEHDI &  
ASIAEE NAHID  
23745 SW BOONES FERRY RD  
TUALATIN, OR 97062

LUCINI JOHN W & GRACE N FAM TRU  
23677 SW BOONES FERRY RD  
TUALATIN, OR 97062

MAST MARVIN R &  
JELI CARLENE M  
23845 SW BOONES FERRY RD  
TUALATIN, OR 97062

HICKOK TODD J &  
HICKOK MOLLY J  
23855 SW BOONES FERRY RD  
TUALATIN, OR 97062

HORIZON COMMUNITY CHURCH  
PO BOX 2690  
TUALATIN, OR 97062

RE THOMAS J & KATHRYN S  
19035 SW CHESAPEAKE DR  
TUALATIN, OR 97062

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGO, OR 97034

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGO, OR 97034

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGO, OR 97034

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGO, OR 97034

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGO, OR 97034

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGO, OR 97034

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGO, OR 97034

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATIN, OR 97062

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATIN, OR 97062

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATIN, OR 97062

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATIN, OR 97062

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATIN, OR 97062

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATIN, OR 97062

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATIN, OR 97062

CHAMBERLAIN JOHN &  
CHAMBERLAIN DEBRA  
9000 SW GREENHILL LN  
TUALATIN, OR 97062

CHAMBERLAIN PARTNERS LLC  
10330 SW TUALATIN RD  
TUALATIN, OR 97062

SCOTT JOAN D  
PO BOX 2594  
TUALATIN, OR 97062

LEE DAVID O &  
RAPISARDA DEIDRE  
24245 SW BOONES FERRY RD  
TUALATIN, OR 97062

SHAMBURG SCOTT A &  
SHAMBURG LISA G  
PO BOX 829  
TUALATIN, OR 97062



ODOMS LIVING TRUST  
BY JAMES A & LINDA L ODOMS TRS  
PO BOX 2446  
TUALATIN, OR 97062

ANGIN JONATHAN & BRIDGET TRUST  
PO BOX 2413  
TUALATIN, OR 97062

ZIMMERMAN STEPHEN A &  
MATHYS JACKIE L  
24305 SW BOONES FERRY RD  
TUALATIN, OR 97062

9375 SW STONO DR  
TUALATIN, OR 97062-7295

22940 SW VERMILLION DR  
TUALATIN, OR 97062-7060

AGORIO DIANA  
22790 SW 87TH PL  
TUALATIN, OR 97062-7289

ALLARD JOHN A &  
ALLARD KELCIE L  
8885 SW IOWA DR  
TUALATIN, OR 97062-7163

ALLEN FRED A JR &  
EDMONDSON REBECCA R  
22650 SW MANDAN DR  
TUALATIN, OR 97062-7130

ALLISON VICKI R  
8994 SW STONO DR  
TUALATIN, OR 97062-7219

ALSOP RICHARD F  
22800 SW 89TH PL  
TUALATIN, OR 97062-7217

ANDERSON SCOTT A &  
ANDERSON ANDREA N  
22825 SW 92ND PL  
TUALATIN, OR 97062-7225

ANDERSON RICHARD J JR  
22630 SW 93RD TER  
TUALATIN, OR 97062-7248

ANTHIMIADES GEORGE T &  
ANTHIMIADES STEPHANIE J  
8735 SW STONO DR  
TUALATIN, OR 97062-7180

ARCHULETA JOHN L &  
ARCHULETA ELISHA J  
9385 SW SKOKOMISH LN  
TUALATIN, OR 97062-7245

AROZA EMMANUEL E  
17084 SW LYNNLY WAY  
SHERWOOD, OR 97140-8751

ATKINS DANIEL J &  
ATKINS DAWNITA G  
22570 SW 93RD TER  
TUALATIN, OR 97062-7249

AUGEE JOEL L &  
AUGEE HEIDI M S  
8905 SW IOWA DR  
TUALATIN, OR 97062-7175

AUST JOSEPHINE A  
8846 SW STONO DR  
TUALATIN, OR 97062-7177

AUSTIN MICHAEL P &  
AUSTIN ALLISON M  
9325 SW IOWA DR  
TUALATIN, OR 97062-7237

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGO, OR 97034-3937

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGO, OR 97034-3937

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGO, OR 97034-3937

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGO, OR 97034-3937

AUTUMN SUNRISE LLC  
485 S STATE ST  
LAKE OSWEGO, OR 97034-3937

BABCOCK GAYLON  
8680 SW STONO DR  
TUALATIN, OR 97062-7182

BACA GREGORY R &  
BACA ELIZABETH R  
16869 SW 65TH AVE #387  
LAKE OSWEGO, OR 97035-7865

BADARACCO ERIN  
8456 SW MOHAWK ST  
TUALATIN, OR 97062-9139

BAKER STANTON M &  
BAKER ROCIO L  
22565 SW MANDAN DR  
TUALATIN, OR 97062-7134

BANKS LANDON &  
BANKS MIRANDA  
22850 SW 93RD TER  
TUALATIN, OR 97062-7302

BEAR ALISA ANN TRUST  
8525 SW MARICOPA DR  
TUALATIN, OR 97062-7173

BECKER SUSAN  
9405 SW QUINAULT LN  
TUALATIN, OR 97062-7307

BEDIENT SONYA &  
GOUY PHIL  
8995 SW IOWA DR  
TUALATIN, OR 97062-7222

BEEBE BRENT E &  
BEEBE SANDRA L  
8895 SW STONO DR  
TUALATIN, OR 97062-7184

BEIKMAN STEPHEN &  
BEIKMAN MONIQUE  
22760 SW 87TH PL  
TUALATIN, OR 97062-7289

BELL REV TRUST  
BY SHELBY BELL TR  
8930 SW IOWA DR  
TUALATIN, OR 97062-7174

BERGER BARBARA A REV LIV TRUST  
6625 SW PRESLYNN DR  
PORTLAND, OR 97225-2633

BLACK JENNIFER O &  
BLACK DAVID O JR  
9040 SW STONO DR  
TUALATIN, OR 97062-7286

BOX MICHAEL L &  
BOX KATIE M  
9370 SW PALOUSE LN  
TUALATIN, OR 97062-7251

BUHAY JASON &  
BUHAY MICHELLE  
9300 SW STONO DR  
TUALATIN, OR 97062-7300

BURNETT CLINT D &  
BURNETT JULIE R  
8940 SW IOWA DR  
TUALATIN, OR 97062-7174

CALDERON CAMIE M  
22735 SW 92ND PL  
TUALATIN, OR 97062-7313

CAMPBELL ANGELA R &  
CAMPBELL CHRISTOPHER A  
22910 SW MANDAN DR  
TUALATIN, OR 97062-7133

CARLSON RICHARD  
11105 BERRY RD  
VALLEY CENTER, CA 92082-4214

BELDING ROBERT E LIV TRUST  
22745 SW VERMILLION DR  
TUALATIN, OR 97062-7058

BEMROSE HEATHER LYNN  
9320 SW IOWA DR  
TUALATIN, OR 97062-7368

BICANDI MICHAEL  
22835 SW 90TH PL  
TUALATIN, OR 97062-7223

BOELL DONALD B &  
BOELL PATRICIA J  
22675 SW 87TH  
TUALATIN, OR 97062-7066

BRACKNEY CHRIS  
23355 SW 82ND AVE  
TUALATIN, OR 97062-9613

BUNCE MICHAEL R REVOC LIV TRUST  
BUNCE DEBORAH J REVOC LIV TRUST  
9150 SW IOWA DR  
TUALATIN, OR 97062-7226

BURNS DANIEL D &  
KRILL DEANN R  
9345 SW QUINAULT LN  
TUALATIN, OR 97062-7306

CALKINS MICHAEL &  
CALKINS DIANE  
8890 SW STONO DR  
TUALATIN, OR 97062-7179

CARBAJAL PEDRO &  
CARBAJAL REGINA  
8925 SW IOWA DR  
TUALATIN, OR 97062-7175

CARNS STEVEN C  
9335 SW QUINAULT LN  
TUALATIN, OR 97062-7306

BELL JAMES M &  
BELL EVA J  
22710 SW VERMILLION DR  
TUALATIN, OR 97062-7058

BENNETT JASON M &  
MCALEER MARGUERITE T  
22730 SW VERMILLION DR  
TUALATIN, OR 97062-7058

BIEBERDORF JENNIFER E &  
BIEBERDORF JEREMY  
22695 SW MANDAN DR  
TUALATIN, OR 97062-7135

BOSKET JOHN A &  
BOSKET JULIE L  
9355 SW STONO DR  
TUALATIN, OR 97062-7296

BRASHEAR GREGORY A  
22935 SW MANDAN DR  
TUALATIN, OR 97062-7186

BURCHFIEL LARRY &  
BURCHFIEL DEBORAH  
8858 SW STONO DR  
TUALATIN, OR 97062-7177

CAIS CARLY J  
9340 SW STONO DR  
TUALATIN, OR 97062-7300

CALVANO FAMILY TRUST  
BY MICHAEL A & SILVIA E CALVANO TRS  
22760 SW 90TH PL  
TUALATIN, OR 97062-7223

CARDENAS FERNANDO  
9340 SW QUINAULT LN  
TUALATIN, OR 97062-7304

CHADWICK SCOTT A  
6650 MAPLE AVE  
OAK HILLS, CA 92344-0126

CHAMBERLAND MATHEW &  
CHAMBERLAND JAMES W  
8975 SW IOWA DR  
TUALATIN, OR 97062-7222

CHAMPAGNE PATRICK &  
ROY CELINE  
8880 SW IOWA DR  
TUALATIN, OR 97062-7163

CHAN JOSEPH L  
23156 BLAND CIR  
WEST LINN, OR 97068-9203

CHAN CHEUK YEE CHAN REVOC LIV T  
1531 SE FLAVEL ST  
PORTLAND, OR 97202

CHAND PARBIN  
22600 SW MANDAN DR  
TUALATIN, OR 97062-7130

CHASE HARRY M &  
CHASE CATHY LEE  
8799 SW STONO DR  
TUALATIN, OR 97062-7290

CHAUSSE PETER L &  
CHAUSSE PAULINA  
22920 SW 82ND AVE  
TUALATIN, OR 97062-9680

CHEN RICHARD &  
CHEN LENA  
PO BOX 1551  
LAKE OSWEGO, OR 97035-0556

CHEN RICHARD &  
CHEN LENA  
PO BOX 1551  
LAKE OSWEGO, OR 97035-0556

CHILDS ROBERT M &  
CHILDS MARY J  
22705 SW VERMILLION DR  
TUALATIN, OR 97062-7062

CHRISTENSEN STANFORD DEE & CARO  
BY STANFORD DEE & CAROL MAE  
CHRISTE  
8980 SW STONO DR  
TUALATIN, OR 97062-7218

CHRISTENSEN MICHAEL A &  
CHRISTENSEN JAMIE L  
23725 SW 82ND AVE  
TUALATIN, OR 97062-9612

CLARK ROY H  
9295 SW PALOUSE LN  
TUALATIN, OR 97062-7250

COBB DANIEL Z &  
COBB ROSA  
22770 SW 89TH PL  
TUALATIN, OR 97062-7217

CONFER ANDREW B  
22575 SW 87TH PL  
TUALATIN, OR 97062-7233

COOK DAVID C &  
COOK DAYNA L  
22660 SW 93RD TER  
TUALATIN, OR 97062-7248

COOPER JULIE ANN LIV TRUST  
BY JULIE ANN COOPER TR  
9390 SW IOWA DR  
TUALATIN, OR 97062-7311

CRANSTON MICHAEL S  
8845 SW STONO DR  
TUALATIN, OR 97062-7161

CRISP TONI K  
9380 SW IOWA DR  
TUALATIN, OR 97062-7310

CRONKRITE ERIK  
9315 SW PALOUSE LN  
TUALATIN, OR 97062-7250

CRUZ ALEJANDRO FRANCISCO  
9270 SW SKOKOMISH LN  
TUALATIN, OR 97062-7247

CURTHOYS CAROL ANN REV LIV TRUS  
8879 SW IOWA DR  
TUALATIN, OR 97062-7163

DARLING LANCE F  
22865 SW 94TH TER  
TUALATIN, OR 97062-7294

DAVIS JASON WAYNE  
9180 SW STONO DR  
TUALATIN, OR 97062-7278

DAVIS JAMES HAYES &  
BRANSON-DAVIS NESHIA  
23395 SW 82ND AVE  
TUALATIN, OR 97062-9613

DEARDORFF CRAIG S &  
DEARDORFF ALBERTA  
22595 SW 93RD TER  
TUALATIN, OR 97062-7249

DEHOOG MARCEL F &  
DEHOOG STACEY K  
22795 SW 94TH TER  
TUALATIN, OR 97062-7294

DEMPSTER MICHAEL M  
22830 SW MANDAN DR  
TUALATIN, OR 97062-7132

DERIENZO NICHOLAS C &  
DERIENZO COURTNEY LEIGH  
22755 SW 87TH PL  
TUALATIN, OR 97062-7289

DITTMAN ADAM H &  
DITTMAN ELIZABETH A C  
22785 SW 89TH PL  
TUALATIN, OR 97062-7217

DOSS ANDREA &  
DOSS BRANDON  
22580 SW 94TH TER  
TUALATIN, OR 97062-7243

DOW PETER J REV TRUST &  
SHERFY JENNIFER L REV TRUST  
9360 SW QUINAULT LN  
TUALATIN, OR 97062-7304

DUFFIELD RICHARD &  
DUFFIELD KATIE ANN  
22865 SW MANDAN DR  
TUALATIN, OR 97062-7137

DUNN PATRICK P &  
DUNN CLARA I RUSINQUE  
9380 SW PALOUSE LN  
TUALATIN, OR 97062-7251

EAKINS EILEEN G  
22760 SW 93RD TERR  
TUALATIN, OR 97062-7301

EDELINE JENNIFER A &  
EDELINE SEAN M  
9350 SW QUINAULT LN  
TUALATIN, OR 97062-7304

ENNIS MARK &  
ENNIS BARBARA  
9380 SW STONO DR  
TUALATIN, OR 97062-7300

ERDMAN PAUL &  
ERDMAN PAMALA B  
8862 SW STONO DR  
TUALATIN, OR 97062-7177

ERWERT EMILY  
22915 SW 94TH TER  
TUALATIN, OR 97062-7294

ESAU EVAN &  
ESAU MICHELLE  
18315 CAPISTRANO WAY  
MORGAN HILL, CA 95037-2922

ESZLINGER ERIC &  
ESZLINGER NATASHA  
9395 SW QUINAULT LN  
TUALATIN, OR 97062-7307

FADLING JULIE H  
22630 SW VERMILLION DR  
TUALATIN, OR 97062-7057

FAST JEFFREY &  
FAST TIFFANY  
22800 SW MANDAN DR  
TUALATIN, OR 97062-7132

FEUCHT DANIEL & BEVERLY LIV TRU  
22715 SW 87TH PL  
TUALATIN, OR 97062-7066

FINDERS DEBRA P  
9355 SW PALOUSE LN  
TUALATIN, OR 97062-7250

FORCE ROBERT B &  
FORCE JEANETTE M  
9365 SW PALOUSE LN  
TUALATIN, OR 97062-7251

FOSSE PATRICIA J &  
FOSSE RANDY C  
22925 SW MANDAN DR  
TUALATIN, OR 97062-7185

FRANCIS FRANK J &  
FRANCIS HELEN MARIE  
9130 SW IOWA DR  
TUALATIN, OR 97062-7226

FRANCIS KATHLEEN &  
FRANCIS DAN  
9345 SW SKOKOMISH LN  
TUALATIN, OR 97062-7316

FRANKS TERRENCE D  
22730 SW 90TH PL  
TUALATIN, OR 97062-7223

FRAVEL LINDA S  
9365 SW SKOKOMISH  
TUALATIN, OR 97062-7245

FRAZIER FAMILY LLC  
22830 SW 89TH PL  
TUALATIN, OR 97062-7217

FRAZIER JOHN D IV &  
FRAZIER WANDA R  
22830 SW 89TH PL  
TUALATIN, OR 97062-7217

FRENCH RODERICK LEE &  
FRENCH THERESE LYNN  
9080 SW STONO DR  
TUALATIN, OR 97062-7220

FRIBLEY SARAH E &  
FRIBLEY CHAD C  
9005 SW STONO DR  
TUALATIN, OR 97062-7219

FRONIUS JOHN A &  
FRONIUS SUSAN A  
22650 SW 87TH PL  
TUALATIN, OR 97062-7065

FRY ALBERTA A TRUST  
9175 SW STONO DR  
TUALATIN, OR 97062-7221

FULLER ERIC M &  
FULLER XIAOYAN  
9365 SW QUINAULT LN  
TUALATIN, OR 97062-7306

GALVER ROBERTO &  
GALVER PATRICIA BYRNE  
22995 SW VERMILLION DR  
TUALATIN, OR 97062-7063

GAMACHE ROBERT R &  
GAMACHE CHERI M  
22770 SW VERMILLION DR  
TUALATIN, OR 97062-7059

GARIBAY JAIME  
22555 SW 94TH TER  
TUALATIN, OR 97062-7243

GENSLER KRISTOPHER &  
GENSLER MARIAH  
8540 SW MARICOPA DR  
TUALATIN, OR 97062-7069

GEORGE TIMOTHY P &  
GEORGE BETHANY  
9335 SW IOWA DR  
TUALATIN, OR 97062-7238

GHODS SHAWN M &  
GHODS JENNA N  
22815 SW 89TH PL  
TUALATIN, OR 97062-7217

GILBERT CHRISTOPHER S &  
GILBERT TAYLOR A  
22680 SW 87TH PL  
TUALATIN, OR 97062-7065

GILCHRIST BEVERLY &  
GILCHRIST ROLAND T  
9310 SW IOWA ST  
TUALATIN, OR 97062-7309

GLAESER CHARLES W &  
GLAESER CHRISTA M  
8955 SW IOWA DR  
TUALATIN, OR 97062-7222

GLASS BRIAN D &  
GLASS LEAH M  
8900 SW SWEEK DR #537  
TUALATIN, OR 97062-7544

GOFORTH NATHAN L &  
TAAFFE JULIA C  
22755 SW 90TH PL  
TUALATIN, OR 97062-7223

GORGER MOLLY J TRUST  
PO BOX 230725  
TIGARD, OR 97281-0725

GREEN JUSTIN J  
8560 SW MARICOPA DR  
TUALATIN, OR 97062-7069

GRIFFITH DWIGHT A &  
GRIFFITH H KAY  
22905 SW VERMILLION DR  
TUALATIN, OR 97062-7063

GUERRA FILEMON M JR &  
QUIRANTE MALINDA  
8899 SW IOWA DR  
TUALATIN, OR 97062-7163

GUTIERREZ PATRICK A REV TRUST  
8750 SW STONO DR  
TUALATIN, OR 97062-7068

GUZMAN-FERNANDEZ LUIS E &  
GUZMAN PETRA  
35215 SW TONGUE LN  
CORNELIUS, OR 97113-6241

HALL SCOTT &  
HALL BETH  
9065 SW STONO DR  
TUALATIN, OR 97062-7220

HAMILTON JAMES &  
HAMILTON KRISTIN  
9400 IOWA DR  
TUALATIN, OR 97062-7311

HAMILTON GEORGE & ALICE TRUST  
22740 SW 87TH PL  
TUALATIN, OR 97062-7065

HAMM STEVEN &  
HAMM SANDRA  
22725 SW VERMILLION DR  
TUALATIN, OR 97062-7062

HANAWA IWAO &  
HANAWA LAURIE  
3528 CHEROKEE CT  
WEST LINN, OR 97068-1027

HARRISON LIV TRUST  
BY GARY HARRISON TR  
8976 SW STONO DR  
TUALATIN, OR 97062-7218

HATCHER THOMAS W &  
HATCHER ELIZABETH A  
22645 SW VERMILLION DR  
TUALATIN, OR 97062-7061

HAUBBINE PATRICK E &  
HAUBBINE DELEE H  
9215 SW STONO DR  
TUALATIN, OR 97062-7279

HEINZE JOINT TRUST  
BY GREGORY R & CONNIE S HEINZE TRS  
8070 SW LAUREL ST  
PORTLAND, OR 97225-2350

HEIRONIMUS JULIE A &  
VALLECK GEORGE D  
22710 SW 90TH PL  
TUALATIN, OR 97062-7231

HERNANDEZ KIMBERLY A  
22500 SW MANDAN DR  
TUALATIN, OR 97062-7129

HERRERA FERNANDO &  
HERRERA MARIA D  
9360 SW STONO DR  
TUALATIN, OR 97062-7300

HERTZ PAULA D  
22900 SW MANDAN DR  
TUALATIN, OR 97062-7133

HESEL MARGARET L REV LIV TRUST  
HESEL ALLAN J REV LIV TRUST  
PO BOX 166  
TOLOVANA PARK, OR 97145-0166

HEYER TRUST  
BY HANS-JOACHIM & ROSEMARIE HEYER  
T  
22775 SW VERMILLION DR  
TUALATIN, OR 97062-7059

HIEFIELD PRESTON C III &  
STRATTON GILLIAN M  
9195 SW IOWA DR  
TUALATIN, OR 97062-7344

HIGASHI DUSTIN L &  
SANTORO ANGELA C  
22895 SW MANDAN DR  
TUALATIN, OR 97062-7137

HILDRETH TYRONE MACGREGOR &  
HILDRETH SHANA LYNNE  
9355 SW QUINAULT LN  
TUALATIN, OR 97062-7306

HILL COURTNEY M &  
SHERMAN BENJAMIN C  
22575 SW 94TH TER  
TUALATIN, OR 97062-7243

HODGE KENNETH M  
9235 SW STONO DR  
TUALATIN, OR 97062-7279

HOLDBROOK-DADSON DENISE  
9330 SW SKOKOMISH LN  
TUALATIN, OR 97062-7316

HOOVER DAN M  
8993 SW STONO DR  
TUALATIN, OR 97062-7219

HORIZON COMMUNITY CHURCH  
PO BOX 2690  
TUALATIN, OR 97062-2690

HOUTZ LIVING TRUST  
BY ROBERT E & VIRGINIA F HOUTZ TRS  
8170 SW VLAHOS DR APT 112  
WILSONVILLE, OR 97070-6485

HUALA ROBIN PATRICK  
14607 NE 57TH ST  
BELLEVUE, WA 98007-3052

HUMPHREY MARGIE LIV TRUST  
22820 SW 92ND PL  
TUALATIN, OR 97062-7225

HUMPHREY SUSAN E  
8801 SW STONO DR  
TUALATIN, OR 97062-7161

HURTADO STEFANIE &  
CUELLAR PABLO  
22845 SW 94TH TER  
TUALATIN, OR 97062-7294

HYRE TIMOTHY R &  
HYRE ANNILEE D  
22840 SW VERMILLION DR  
TUALATIN, OR 97062-7059

JACOBS JEFFREY W  
9360 SW PALOUSE LN  
TUALATIN, OR 97062-7251

JASTRAM WILLIAM E &  
JASTRAM CHRISTINE A  
9015 SW IOWA DR  
TUALATIN, OR 97062-7222

JENKINS PHILIP D &  
JENKINS KRISTEN K  
9240 SW STONO DR  
TUALATIN, OR 97062-7279

KALATEH EBRAHIM SHIRDOOST &  
DOOST NOOSHIN NEZAM  
22585 SW 87TH PL  
TUALATIN, OR 97062-7288

KENNEDY MICHAEL C &  
KENNEDY LINDA M  
22735 SW 87TH PL  
TUALATIN, OR 97062-7066

KERN KEVIN  
9450 SW IOWA DR  
TUALATIN, OR 97062-7311

KERNER ROBERT  
8850 SW STONO DR  
TUALATIN, OR 97062-7177

KINNAMAN JEFFREY B &  
KINNAMAN JENNIFER D  
8780 SW STONO DR  
TUALATIN, OR 97062-7068

KIS JUAN ANTONIO &  
KIS CLAUDIA J  
22615 SW 93RD TER  
TUALATIN, OR 97062-7248

KLAUSS CYDNI M  
22635 SW 87TH PL  
TUALATIN, OR 97062-7288

KLEPICH DAVID &  
KLEPICH BRITTANI  
22545 SW MANDAN DR  
TUALATIN, OR 97062-7134

KLOSSNER ANDREW J  
8854 SW STONO DR  
TUALATIN, OR 97062-7177

KNUDSON THOMAS &  
KNUDSON LINDA SALYERS  
8725 SW STONO DR  
TUALATIN, OR 97062-7180

LACEY LONNIE D &  
LACEY LORI A  
22665 SW 94TH TER  
TUALATIN, OR 97062-7242

LAM DAVID &  
NGUYEN BETH NGOC BICH  
8700 SW STONO DR  
TUALATIN, OR 97062-7182

LANDCASTER DEVELOPMENT CORPORATI  
6770 SW CANYON DR  
PORTLAND, OR 97225-3650

LARA SALVADOR  
22845 SW 93RD TER  
TUALATIN, OR 97062-7302

LATHROP JEFFREY A &  
LATHROP MARIA M  
9265 SW IOWA DR  
TUALATIN, OR 97062-7281

LEE WILLIAM  
9335 SW PALOUSE LN  
TUALATIN, OR 97062-7250

LEE FLORENCE &  
YAM WAI LUN  
8822 SW STONO DR  
TUALATIN, OR 97062-7177

LIMING JEANNE E  
9380 SW SKOKOMISH LN  
TUALATIN, OR 97062-7245

LIN HSIU-LING  
9365 SW STONO DR  
TUALATIN, OR 97062-7296

LOUCKS JON D &  
LOUCKS MONIQUE B  
9395 SW SKOKOMISH LN  
TUALATIN, OR 97062-7246

LUSBY CRAIG D &  
LUSBY E GAYLENE  
8675 SW STONO DR  
TUALATIN, OR 97062-7067

LUSCOMBE BRUCE C TRUST  
22605 SW 87TH PL  
TUALATIN, OR 97062-7288

LYNCH LARRY L &  
LYNCH SUZANNE M  
23185 SW 82ND AVE  
TUALATIN, OR 97062-9635

MACK ADAMS S &  
MACK KATHRYN M  
8900 SW IOWA DR  
TUALATIN, OR 97062-7174

MAI YEN THI &  
MAI TRUNG QUANG  
8983 SW STONO DR  
TUALATIN, OR 97062-7218

MAIER DARLA &  
MAIER THOMAS  
9340 SW PALOUSE LN  
TUALATIN, OR 97062-7315

MALONEY CHERYL L  
22820 SW VERMILLION DR  
TUALATIN, OR 97062-7059

MALONSON GARY D &  
MALONSON MARSHA L  
22955 SW VERMILLION DR  
TUALATIN, OR 97062-7063

MARBLE AMANDA L  
8989 SW STONO DR  
TUALATIN, OR 97062-7218

MARK HENRY &  
MARK CHRISTINE  
22725 SW 90TH PL  
TUALATIN, OR 97062-7232

MARLEAU ALLISON P  
22615 SW VERMILLION DR  
TUALATIN, OR 97062-7284

MARTIN FAMILY TRUST  
BY PATRICK R & TERRI K MARTIN TRS  
8986 SW STONO DR  
TUALATIN, OR 97062-7218

MARTIN GARY D &  
LUMLEY-MARTIN MEGAN B  
22785 SW MANDAN DR  
TUALATIN, OR 97062-7136

MATHERS LES D &  
MATHERS CHRIS A  
23050 SW 82ND AVE  
TUALATIN, OR 97062-9635

MCALLISTER DENNIS C &  
MCALLISTER RAGNHILD  
8805 SW STONO DR  
TUALATIN, OR 97062-7161

MCCAULEY KEVIN L  
8950 SW IOWA DR  
TUALATIN, OR 97062-7222

MCCORMICK KIMBERLEY A  
8882 SW STONO DR  
TUALATIN, OR 97062-7179

MCGILCHRIST STEPHEN R &  
NYSTROM-GERDES ELIZABETH R  
22720 SW 93RD TER  
TUALATIN, OR 97062-7301

MCGRADY ANDREA M  
9260 SW SKOKOMISH LN  
TUALATIN, OR 97062-7247

MCKEAN AMY &  
MCKEAN RAYMOND  
22685 SW VERMILLION DR  
TUALATIN, OR 97062-7283

MCKEAN JOHN R &  
MCKEAN LINDA L  
21370 MAKAH CT  
TUALATIN, OR 97062-9309

MCKEE ASHER MARKHAM &  
MCKEE ERIN MARIE  
22850 SW MANDAN DR  
TUALATIN, OR 97062-7132

MCLAUGHLIN NATHANIEL ANDREW &  
MCLAUGHLIN AREENA DEVI  
8960 SW IOWA DR  
TUALATIN, OR 97062-7222



MCREYNOLDS CHRIS &  
MCREYNOLDS AUDREY  
22720 SW 87TH PL  
TUALATIN, OR 97062-7065

MENES MARK A  
9280 SW STONO DR  
TUALATIN, OR 97062-7299

MENESES VIRGINIA &  
VALENCIA DIEGO  
22915 SW MANDAN DR  
TUALATIN, OR 97062-7137

MICHAEL SCOTT CURTIS &  
MICHAEL TINA FRANCINE  
8580 SW MARICOPA DR  
TUALATIN, OR 97062-7069

MICHELS ELIZABETH A  
22590 SW 93RD TER  
TUALATIN, OR 97062-7249

MIKULA KATERINA  
9330 SW PALOUSE LN  
TUALATIN, OR 97062-7314

MILLER BARBRA C  
9315 SW IOWA DR  
TUALATIN, OR 97062-7237

MILLER CAROLE D LIV TRUST  
8834 SW STONO DR  
TUALATIN, OR 97062-7177

MOLLER THERESA  
22825 SW 93RD TER  
TUALATIN, OR 97062-7302

MOORE DAVID C &  
MOORE TAMMY  
8990 SW STONO DR  
TUALATIN, OR 97062-7218

MORELAND GREG &  
MORELAND BEVERLY H  
753 KOTZY AVE S  
SALEM, OR 97302-6026

MOSHOFKY JOHN &  
MOSHOFKY GINGER  
9310 SW SKOKOMISH LN  
TUALATIN, OR 97062-7247

MOTT LINDA L  
22525 SW MANDAN DR  
TUALATIN, OR 97062-7134

MOYES DUSTIN  
8765 SW STONO DR  
TUALATIN, OR 97062-7181

MUD ROOM LLC  
23605 SW 82ND AVE  
TUALATIN, OR 97062-9613

MURPHY MICHAEL F &  
OLSON-MURPHY ANTONETTE K  
8870 SW IOWA DR  
TUALATIN, OR 97062-7164

NEARY TIMOTHY &  
NEARY LUCY  
22780 SW 92ND PL  
TUALATIN, OR 97062-7225

NEILL RACHEL &  
HUSUM BRENT  
9350 SW STONO DR  
TUALATIN, OR 97062-7300

NELL ZACHARY D &  
NELL KENDRA  
8842 SW STONO DR  
TUALATIN, OR 97062-7177

NELSON MICHAEL D &  
NELSON ASHLEY K  
22590 SW VERMILLION DR  
TUALATIN, OR 97062-7057

NELSON KIRIN H  
8826 SW STONO DR  
TUALATIN, OR 97062-7177

NEWBERRY GARY B &  
THOMPSON DONNA L  
9295 SW IOWA DR  
TUALATIN, OR 97062-7237

NEWTON KYLE C &  
NEWTON HAILEY R  
8814 SW STONO DR  
TUALATIN, OR 97062-7160

NGUYEN KHANH T &  
FONG TODD P  
23605 SW 82ND AVE  
TUALATIN, OR 97062-9613

NORTH DAVID P &  
NORTH BARBARA  
8818 SW STONO DR  
TUALATIN, OR 97062-7160

NORWOOD HEIGHTS OWNERS OF LOTS 1  
, OR 00000

NORWOOD HEIGHTS OWNERS OF LOTS 3  
, OR 00000

NOYES PATRICK A &  
THOMPSON CAMILLIA M  
22810 SW 92ND PL  
TUALATIN, OR 97062-7225

OCHS LANCE &  
OCHS RICKI  
22785 SW 87TH PL  
TUALATIN, OR 97062-7289

OLIVERA APOLINAR &  
OLIVERA DEBBIE &  
22640 SW VERMILLION DR  
TUALATIN, OR 97062-7057

O'NEAL DANNY F &  
O'NEAL JONI L  
22625 SW 94TH TER  
TUALATIN, OR 97062-7242

P3 PROPERTIES LLC  
BY PAUL PENNINGTON  
PO BOX 691  
WHITE SALMON, WA 98672-0691

PARK YOUNG OK  
22820 SW 90TH PL  
TUALATIN, OR 97062-7223

PFEIFER STEPHANIE B  
22530 SW 93RD TER  
TUALATIN, OR 97062-7249

QIAN LIDONG &  
YANG YUYUAN  
8815 SW STONO DR  
TUALATIN, OR 97062-7161

RAY CYNTHIA P  
8878 SW STONO DR  
TUALATIN, OR 97062-7179

REPCAK ROMAN &  
PARK-REPCAK ROBIN  
22810 SW 93RD TER  
TUALATIN, OR 97062-7302

ROBERTS LISA A  
22535 SW 94TH TER  
TUALATIN, OR 97062-7243

ROMEIKE ROGER W &  
ROMEIKE SHERREL K  
22665 SW MANDAN DR  
TUALATIN, OR 97062-7135

RULE JEFFREY  
8755 SW STONO DR  
TUALATIN, OR 97062-7181

ORLANDINI ANTHONY J &  
ORLANDINI JUDY R  
8555 SW MARICOPA DR  
TUALATIN, OR 97062-7173

PADE VIRGIL DEAN &  
PADE DEBORAH LYNN  
PO BOX 1310  
SHERWOOD, OR 97140-1310

PEEBLES CRAIG M &  
PEEBLES TANYA A  
22840 SW 90TH PL  
TUALATIN, OR 97062-7223

PIRTLE JAMES L JR &  
PIRTLE LINDA L  
22780 SW 93RD TER  
TUALATIN, OR 97062-7301

RAMIREZ JOSE ANTONIO  
22560 SW 94TH TER  
TUALATIN, OR 97062-7243

RAZ DOUGLAS JOHN  
22685 SW 94TH TER  
TUALATIN, OR 97062-7240

REYNHOLDS GLENN A &  
REYNHOLDS NANCY J  
22795 SW 92ND PL  
TUALATIN, OR 97062-7225

ROBLES MARCELINO  
22880 SW MANDAN DR  
TUALATIN, OR 97062-7132

ROMINE CLAUDIA  
22980 SW VERMILLION  
TUALATIN, OR 97062-7060

SACKETT ANTHONY  
22635 SW MANDAN DR  
TUALATIN, OR 97062-7135

OSTROWSKI MICHAEL J &  
OSTROWSKI SHERIE M  
9370 SW STONO DR  
TUALATIN, OR 97062-7300

PANOCH RICHARD S &  
CHAVEZ CARISA L  
22530 SW MANDAN DR  
TUALATIN, OR 97062-7129

PETTY NEIL &  
HIBBITTS JOANN  
22985 SW 82ND  
TUALATIN, OR 97062-9680

PITT CHARLES R  
8883 SW IOWA DR  
TUALATIN, OR 97062-7163

RAMKU FAMILY TRUST  
BY DAVID & DINELA RAMKU TRS  
14193 NW MEADOWRIDGE DR  
PORTLAND, OR 97229-2369

RE THOMAS J & KATHRYN S  
19035 SW CHESAPEAKE DR  
TUALATIN, OR 97062-7722

RHONDES ERIK &  
RHODES MEGAN  
9360 SW SKOKOMISH LN  
TUALATIN, OR 97062-7245

ROLISON MIKEL J  
23685 SW 82ND AVE  
TUALATIN, OR 97062-9613

RONALD TY &  
RONALD JENNIFER  
8870 SW STONO DR  
TUALATIN, OR 97062-7178

SALDIVAR CASIMIRO &  
SALDIVAR MARIA CONCEPCION  
22755 SW MANDAN DR  
TUALATIN, OR 97062-7135

SALISBURY VERONICA PIPER &  
PAROSA JOSHUA DAVID  
9360 SW IOWA DR  
TUALATIN, OR 97062-7310

SANCHEZ SALVADOR &  
VARGAS YOANA A  
22570 SW MANDAN DR  
TUALATIN, OR 97062-7130

SANDSTROM GLENN M  
9405 SW PALOUSE LN  
TUALATIN, OR 97062-7251

SAWAI STUART T &  
SAWAI MARY JANE  
8891 SW IOWA DR  
TUALATIN, OR 97062-7163

SCHAFROTH J F &  
SCHAFROTH KATE R  
8838 SW STONO DR  
TUALATIN, OR 97062-7177

SCHOOLER REID G  
22865 SW 93RD TER  
TUALATIN, OR 97062-7302

SCHOTT DAVID M &  
SCHOTT COURTNEY A  
22690 SW VERMILLION DR  
TUALATIN, OR 97062-7058

SCHUETZ DOUGLAS &  
SCHUETZ CHERYL  
9290 SW STONO DR  
TUALATIN, OR 97062-7299

SCHULTZ LARRY & JOANN REV LIV T  
8890 SW IOWA DR  
TUALATIN, OR 97062-7163

SCHWEITZ ERIC J &  
SCHWEITZ KAREN M  
9390 SW SKOKOMISH LN  
TUALATIN, OR 97062-7246

SCOTT JERRY MICHAEL &  
STAMBAUGH DEBRA R  
9080 SW IOWA DR  
TUALATIN, OR 97062-7229

SEKI KATSUMICHI &  
SEKI MIYUKI  
22625 SW 87TH PL  
TUALATIN, OR 97062-7288

SELIVONCHICK GREGORY A &  
SELIVONCHICK GEORGANNE  
8945 SW IOWA DR  
TUALATIN, OR 97062-7175

SHEETZ DONALD K & MARY M SHEETZ  
9155 SW IOWA DR  
TUALATIN, OR 97062-7280

SHIMADA HIROSHI &  
SHIMADA ANGELIQUE  
22645 SW 94TH TER  
TUALATIN, OR 97062-7242

SHIPLEY HEATHER  
9355 SW IOWA DR  
TUALATIN, OR 97062-7238

SHMULEVSKY MICHAEL &  
BALANETSKAYA NATALIA  
25935 NE NORTH VALLEY RD  
NEWBERG, OR 97132-7299

SHOBAKEN THOMAS R  
8795 SW STONO CT  
TUALATIN, OR 97062-7181

SINGLETERRY ELNORA  
23535 SW 82ND AVE  
TUALATIN, OR 97062-9613

SIROIS TYSON &  
JARRARD LINDSEY  
22500 SW PINTO DR  
TUALATIN, OR 97062-8917

SLAWIK JON V &  
SLAWIK VAN MY  
23445 SW 82ND AVE  
TUALATIN, OR 97062-9613

SMITH SCOTT M &  
SMITH ALLYN B  
22750 SW VERMILLION DR  
TUALATIN, OR 97062-7058

SMITH WILLIAM R &  
SMITH BARBARA J  
22865 SW 89TH PL  
TUALATIN, OR 97062-7343

SMITH ROBERT D &  
SMITH JANIS K  
13547 SW HILLSHIRE DR  
TIGARD, OR 97223-5675

SNODDY ROBERT B  
9430 SW IOWA DR  
TUALATIN, OR 97062-7311

SOMERTON RITA G &  
SOMERTON MARVIN  
9375 SW IOWA DR  
TUALATIN, OR 97062-7238

SPECHT-SMITH DANA LYNN &  
SPECHT DAVID LEE  
9380 SW QUINAULT LN  
TUALATIN, OR 97062-7305

ST CLAIR DEBORAH J  
9375 SW QUINAULT LN  
TUALATIN, OR 97062-7306

STILLS DANNY T &  
STILLS DEBRA J  
3498 CHAPARREL LOOP  
WEST LINN, OR 97068-8263

STIMSON TOM P &  
GUTIERREZ-STIMSON ERINN M  
8894 SW STONO DR  
TUALATIN, OR 97062-7179

STUART JAMES W &  
STUART HOLLY V  
9235 SW IOWA DR  
TUALATIN, OR 97062-7281

SUTHERLAND STUART P &  
SUTHERLAND LEEANN N FAM TRUST  
22805 SW 92ND PL  
TUALATIN, OR 97062-7225

SWANK ERICA &  
SWANK TRAVIS  
22715 SW MANDAN DR  
TUALATIN, OR 97062-7135

SYVERSON DANIEL J &  
SYVERSON CASSANDRA MARIE  
8895 SW IOWA DR  
TUALATIN, OR 97062-7163

TAM AARON L M &  
TAM AMY  
9250 SW IOWA DR  
TUALATIN, OR 97062-7281

TAPASA HEIDI L &  
TAPASA TUUMAMAO  
22605 SW 94TH TER  
TUALATIN, OR 97062-7243

TAYLOR BRENDA &  
TAYLOR JOE N  
22885 SW 94TH TER  
TUALATIN, OR 97062-7294

TAYLOR ARTHUR R &  
MANANDIL MYLYN  
22675 SW VERMILLION DR  
TUALATIN, OR 97062-7287

TENLY PROPERTIES CORP  
PO BOX 6839  
BEND, OR 97708-6839

TENLY PROPERTIES CORP  
PO BOX 6839  
BEND, OR 97708-6839

THOMPSON ROBERT JOHN &  
THOMPSON LYNNE  
9270 SW STONO DR  
TUALATIN, OR 97062-7279

THOMPSON WAYNE &  
THOMPSON JOYCE A  
9120 SW STONO DR  
TUALATIN, OR 97062-7221

THURLEY CHRISTOPHER  
9135 SW STONO DR  
TUALATIN, OR 97062-7221

TIGARD-TUALATIN SCHOOL DISTRICT  
6960 SW SANDBURG ST  
TIGARD, OR 97223-8039

TOLER E TRENT &  
TOLER ROSEANN T  
22595 SW 87TH PL  
TUALATIN, OR 97062-7288

TOMPKINS TIMOTHY L &  
TOMPKINS RACHEL N  
22570 SW VERMILLION DR  
TUALATIN, OR 97062-7057

TRICKETT AARON &  
TRICKETT HEATHER  
22580 SW VERMILLION DR  
TUALATIN, OR 97062-7057

TRIKUR MARTA LUIZA &  
TRIKUR SERGEY F  
22775 SW 90TH PL  
TUALATIN, OR 97062-7223

TUALATIN CITY OF  
18880 SW MARTINAZZI AVE  
TUALATIN, OR 97062-7092

TUALATIN CITY OF  
18880 SW MARTINAZZI AVE  
TUALATIN, OR 97062-7092

TUALATIN CITY OF  
18880 SW MARTINAZZI AVE  
TUALATIN, OR 97062-7092

TUALATIN CITY OF  
18880 SW MARTINAZZI AVE  
TUALATIN, OR 97062-7092

TUALATIN CITY OF  
18880 SW MARTINAZZI AVE  
TUALATIN, OR 97062-7092

TUALATIN CITY OF  
18880 SW MARTINAZZI AVE  
TUALATIN, OR 97062-7092

TUALATIN CITY OF  
18880 SW MARTINAZZI AVE  
TUALATIN, OR 97062-7092

TURNBULL BRENT D  
9340 SW IOWA DR  
TUALATIN, OR 97062-7310

TYGART DONALD G &  
MERCADO LORELEI  
22920 SW MANDAN DR  
TUALATIN, OR 97062-7133

VANDEBURG JOHN TIMOTHY REV TRU  
VANDEBURG JACQUELINE L REV TRUST  
21715 SW HEDGES DR  
TUALATIN, OR 97062-8926

VELAZQUEZ BRIAN A &  
VELAZQUEZ CHRISTINA RALSTON  
9325 SW PALOUSE LN  
TUALATIN, OR 97062-7250

VETETO MARK E &  
VETETO NANCY  
9220 SW STONO DR  
TUALATIN, OR 97062-7279

WADSWORTH ERIC &  
WADSWORTH WENDY  
9265 SW STONO DR  
TUALATIN, OR 97062-7279

WASHINGTON COUNTY FACILITIES MGM  
169 N 1ST AVE #42  
HILLSBORO, OR 97124-3001

WEINSTEIN MARC A &  
WEINSTEIN EILEEN  
8830 SW STONO DR  
TUALATIN, OR 97062-7177

WELBORN RANDALL J & JULIE ANN W  
22885 SW VERMILLION DR  
TUALATIN, OR 97062-7063

WELCH RAYMOND P &  
WELCH PAMELA K  
8575 SW MARICOPA DR  
TUALATIN, OR 97062-7173

WESSON MICHAEL SANDER  
9385 SW IOWA DR  
TUALATIN, OR 97062-7238

WIETING FAMILY TRUST  
BY ROBERT C SR & CARLA L WIETING TR  
9150 SW STONO DR  
TUALATIN, OR 97062-7221

WILLIAMS TOM K  
9300 SW NORWOOD RD  
TUALATIN, OR 97062-9618

WILSON DAVID L &  
WILSON KAREN A  
22750 SW 92ND PL  
TUALATIN, OR 97062-7225

WISER BRIAN R &  
LIRA MARIA ALEJANDRA  
22845 SW 89TH PL  
TUALATIN, OR 97062-7217

WOCKENFUSS STACEY L  
22825 SW 94TH TER  
TUALATIN, OR 97062-7294

WONG BETH &  
WONG JON  
9345 SW STONO DR  
TUALATIN, OR 97062-7297

WOODRUFF VIRGINIA C  
22740 SW 93RD TER  
TUALATIN, OR 97062-7301

WOOLSEY RANDY M &  
WOOLSEY DONNA J  
8775 SW STONO DR  
TUALATIN, OR 97062-7181

WORKMAN STEPHEN G &  
WORKMAN MARY B  
8810 SW STONO DR  
TUALATIN, OR 97062-7068

WYBENGA DOUGLAS  
BY DANIEL & MARILYN WYBENGA  
1510 WOODLAND DR  
CORVALLIS, OR 97330-1740

YACKLEY DIANE M &  
GANNETT TOD C  
23240 SW BOONES FERRY RD  
TUALATIN, OR 97062-9619

YAMAMOTO MICHAEL  
22930 SW MANDAN DR  
TUALATIN, OR 97062-7187

YARNELL AARON  
22620 SW 87TH PL  
TUALATIN, OR 97062-7288

YASO TSUTOMU &  
YASO VIETTA  
22600 SW 93RD TER  
TUALATIN, OR 97062-7248

YEE DONALD M  
9105 SW STONO DR  
TUALATIN, OR 97062-7221

YOUNG DOUGLAS A &  
YOUNG TERESA S  
987 SOLANA CT  
MOUNTAIN VIEW, CA 94040-2200

ZACHER BRIAN M &  
ZACHER MICHAELA F  
9325 SW QUINAULT LN  
TUALATIN, OR 97062-7303

## **Exhibit F: Public Notice Information**

---

---

May 27, 2020

**RE: Neighborhood Review Meeting  
Basalt Creek Text Amendment**



Dear Property Owner/Neighbor:

AKS Engineering & Forestry, LLC is holding a neighborhood meeting regarding a proposed amendment to the Tualatin Development Code (TDC). The amendment, submitted by Lennar Northwest, Inc. and Venture Properties, Inc., proposes amendments to the Medium-Low Density Residential (RML) zone of the Basalt Creek Planning Area (BCPA) when part of projects over 15 acres in size. The proposed amendments would add single-family detached homes as a permitted use within the RML zone on large projects, and allow lot size averaging. This amendment will not change the allowable density for the zone. The potential sites are shown on the map included with this letter. Land use applications for physical development will be filed at a future date.

Per the City's instructions, we would like to discuss the project in more detail with you. Due to social distancing measures and the inability to meet in person, this meeting will be held via telephone and online Zoom "webinar". The City of Tualatin Planning Department approves of this means of holding the required neighborhood meeting.

The meeting is scheduled for:

**WEDNESDAY, JUNE 10, 2020 AT 6:00 PM**  
**SEE ATTACHED INSTRUCTIONS TO LEARN HOW TO JOIN THE MEETING**

The purpose of this meeting is to provide a forum for surrounding property owners and residents to review the project so that issues can be identified and considered before the formal application is submitted. This meeting gives you the opportunity to share any special information you know about the property involved. We will try to answer questions related to how the project meets relevant development standards consistent with Tualatin's land use regulations.

Please note that this will be an informational meeting based on the currently proposed code text amendment. You may receive an official notice from the City of Tualatin of your opportunity to participate either by submitting written comments, and/or attending a public hearing in the future.

I look forward to discussing this project with you. If you have questions but will be unable to attend, please feel free to call me at (503) 563-6151 or email me at [mimid@aks-eng.com](mailto:mimid@aks-eng.com).

Sincerely,

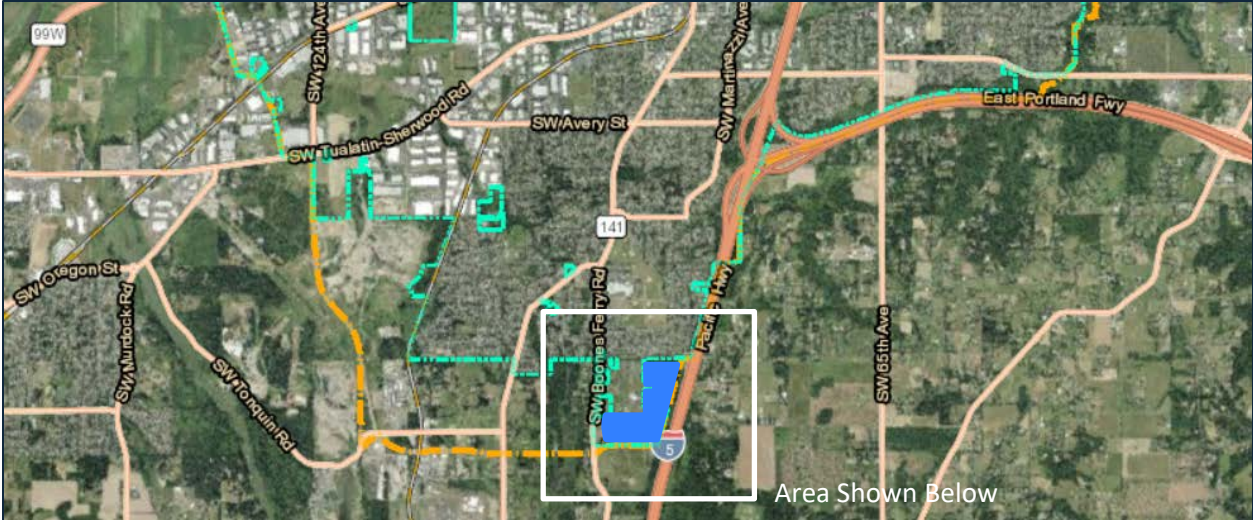
**AKS ENGINEERING & FORESTRY, LLC**

A handwritten signature in blue ink that reads 'Mimi Doukas'.

Mimi Doukas, AICP, RLA – Associate  
12965 SW Herman Road, Suite 100 | Tualatin, OR 97062  
P: 503.563.6151 | [www.aks-eng.com](http://www.aks-eng.com) | [MimiD@aks-eng.com](mailto:MimiD@aks-eng.com)

Attachments: City Vicinity Map  
Instructions for Joining & Participating in the Public Neighborhood Meeting

Potentially Affected Properties





# Instructions for Joining & Participating in the Public Neighborhood Meeting for the Basalt Creek Text Amendment

Virtual Meeting provided via Zoom Webinar

**Wednesday, June 10, 2020 at 6:00 PM PST**

## Please Register in Advance

### (a list of attendees must be submitted to the City):

- Go to [www.aks-eng.com/basalt-creek/](http://www.aks-eng.com/basalt-creek/) and follow the link to register.
- Complete the online registration form.
- You will receive a confirmation email containing a link to join the Zoom webinar at the scheduled time as well as additional instructions.
- Meeting materials will be available at [www.aks-eng.com/basalt-creek/](http://www.aks-eng.com/basalt-creek/) two days prior to the meeting and at least 10 days after the meeting concludes.

## How to Join the Meeting:

### Join by computer, tablet, or smartphone

- **This is the preferred method as it allows you to see the Presenter's materials on screen.**
- Click on the "Click Here to Join" link provided in your registration confirmation email.
- (If you registered at [www.aks-eng.com/basalt-creek/](http://www.aks-eng.com/basalt-creek/) but did not receive a confirmation email, please check your junk/spam folder before contacting the Meeting Administrator.)
- You may be prompted to "download and run Zoom" or to install the App (ZOOM cloud meetings). Follow the prompts or bypass this process by clicking "join from your browser".
- You should automatically be connected to the virtual neighborhood meeting.

### Join by telephone

- Dial any of the toll-free Zoom numbers below to connect to the neighborhood meeting:

+1-669-900-6833	+1-346-248-7799
+1-929-205-6099	+1-253-215-8782
+1-301-715-8592	+1-312-626-6799

- If you experience trouble connecting, please pick another number and try again.
- After dialing in, enter this Zoom ID when prompted: **846 1305 9620**
- The Password if needed is: **6151**

#### **MEETING ADMINISTRATOR:**

For technical assistance or to submit a question for the meeting:

Email [mimid@aks-eng.com](mailto:mimid@aks-eng.com)

## During the Meeting

### **Audio Help**

- Meeting attendees will be muted throughout the presentation. This will allow everyone to hear the presentation clearly without added distractions.
- Make sure that the speakers on your device are turned on and not muted.
- If you do not have speakers on your computer, you can join by phone (using the “Join by telephone” instructions) to hear the presentation while watching the presentation on your computer monitor.

### **Questions & Answers**

Your questions are important to us. There will be time reserved during the meeting to take questions, using one of the submission options below. Our presentation team will make their best effort to answer all question(s) during the meeting.

#### **Prior to the Meeting:**

- You can Email your question(s) in advance to the Meeting Administrator.  
Email [mimid@aks-eng.com](mailto:mimid@aks-eng.com)

#### **During the Meeting:**

- **Preferred Method:** Use the “Q&A” button on the bottom of the presentation screen to submit a question in real time.
- Email your question to the Meeting Administrator:  
Email [mimid@aks-eng.com](mailto:mimid@aks-eng.com)

#### **After the Meeting:**

- We will continue to take questions after the meeting has ended. Please submit your question(s) to the Meeting Administrator:  
Email [mimid@aks-eng.com](mailto:mimid@aks-eng.com)
- All questions received after the meeting and prior to midnight on June 2, 2020 will be answered in an email to all registered meeting participants by end of business the following day.

## Helpful Hints/Troubleshooting

**We want to start on time! Please join the meeting 5-10 minutes prior to the 6:00 PM start time to ensure successful connection.**

- You do not need a Zoom account to join the meeting.
- You will need a valid email address at the time of registration to receive the confirmation email and link to join the webinar or receive answers to any questions submitted after the meeting.
- For first-time Zoom users, we recommend downloading and installing the Zoom App well in advance, by clicking on the “Click Here to Join” link in your confirmation email.
- For technical assistance, please contact the Meeting Administrator (contact above).
- If you have difficulties connecting by computer, tablet, or smartphone, we suggest disconnecting and instead use the “Join by telephone” instructions to listen in.



July 27, 2020

Steve Koper  
City of Tualatin Planning Division  
18880 SW Martinazzi Avenue  
Tualatin, OR 97062-7092

**RE: Supplementary Technical Memo for Basalt Creek RML Plan Text Amendment (PTA-20-0003)**

Dear Steve:

Lennar Northwest, Inc. and Venture Properties, Inc. are co-applicants for the Basalt Creek Medium Low-Density Residential (RML) Plan Text Amendment (PTA-20-0003) land use application. In advance of the City Council hearing scheduled for August 10, 2020, this letter provides clarification on how this application serves the public interest, how it complies with the findings in the 2019 Housing Needs Analysis, the challenges of existing regulations, and how the purpose statement for the Medium Low Density Residential (RML) zone will need to be modified for the Basalt Creek development.

### **Serves the Public Interest**

The Applicants' proposed Text Amendment is in the public interest because it provides an opportunity for the City to test flexible lot size standards in a limited application. The Tualatin 2040 Project planning process highlighted the small-lot subdivisions and lot size averaging across planned unit developments as a strategy for maintaining an adequate supply of developable land in Tualatin.

For Tualatin, the public interest is generally documented in the Comprehensive Plan, which is currently undergoing revisions based on results of the Tualatin 2040 Project planning process. Through City Council Resolution 5479-19, Tualatin has accepted the analyses and policy recommendations of the Tualatin 2040 Project, including *City of Tualatin 2040: Policy Priorities* (December 2019). This policy document directs City Staff to update the Comprehensive Plan to reflect the data and priorities from the Tualatin 2040 Project. The Executive Summary describes:

The documents that guide current and future development in Tualatin, the Comprehensive Plan and Development Code, have not been updated in decades. ...Tualatin 2040 took a 20-year look ahead to review housing and economic data to inform a non-neutral policy analysis... [and] will end in City Council acceptance of policies and strategies that address the City's needs.

In 2020 staff development of a work plan will be undertaken to identify the actions, resources, timing, and responsibility of updating the Comprehensive Plan and Development Code.

Given that the the Tualatin 2040 Project will soon direct a major update to the Comprehensive Plan, the Applicants encourage the Council to place greater consideration for the policies of Tualatin 2040 than the Comprehensive Plan, especially if there are areas of contradiction.

In regard to housing policies, the table below outlines the highest set of priorities.

### High Priorities by Topic

**1: COMMUNITY AND LIVABILITY POLICY PRIORITIES (HIGH PRIORITY BASED ON STAKEHOLDER FEEDBACK<sup>1</sup>)**

Housing and Livability

**Housing affordability** was a major topic of discussion and a concern for all stakeholders and some noted the need for the City to have a plan for housing.

**Greater diversity of Housing Types** in Tualatin was broadly supported; many felt a wider variety of options (other than single-family homes) would provide more affordable options. Alternative housing types discussed with stakeholders were **townhomes/rowhouses, mixed-use development, duplexes, triplexes, and accessory dwelling units (ADU)**. Most stakeholders were in favor of the full range of housing types. One stakeholder noted that small lot and zero lot line subdivisions could provide higher density that doesn't feel cramped.

**Basalt Creek** was mentioned by a number of stakeholders. Others noted that the proposed zoning allows for a good diversity of housing (low density residential, medium low density residential and some high density residential, but that lots should be 3,000 or 4,000 square foot lots.

*City of Tualatin 2040: Policy Priorities, December 2019 Final*

Those final policies are based on recommendations from the technical team and public feedback. The background recommendations are shown in the tables below that provide background explanation for the policy development:

### Summary of Actions

The table below summarizes the strategies, actions, and recommendations made by the CAC. The priority shown in the table is based on discussions with the CAC about the actions they view to be in need of prompt attention. Low-priority actions represent actions that the CAC thinks are important but that may be executed later in the Tualatin 2040 process. At some level, all of the actions in this strategy are a high priority for the CAC.

Strategies, Actions, and Recommendations	Priority
<b>Strategy 1: Ensure an adequate supply of land that is available and serviceable.</b>	
<b>Action 1.1. Evaluate opportunities to increase development densities within Tualatin's existing zones by modifying the Development Code.</b> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 1.1a:</b> Evaluate increasing densities in the Residential High and Residential High Density / High Rise residential designations by allowing buildings that are five to eight stories tall.</li> <li>▪ <b>Recommendation 1.1b:</b> Conduct an audit of the City's Development Code to identify barriers to residential development (e.g., lot size, setbacks, and lot coverage ratio) and identify alternatives for lowering or eliminating the barriers.</li> <li>▪ <b>Recommendation 1.1c:</b> Evaluate off-street parking requirements for multifamily housing to identify opportunities for reduction in parking requirements, especially for housing developed for groups who have fewer cars.</li> <li>▪ <b>Recommendation 1.1d:</b> Adopt a Planned Unit Development (PUD) ordinance to allow flexibility in both development standards and housing types.</li> </ul>	High

*City of Tualatin 2040: Policy Priorities, December 2019 Final, APPENDIX C: HOUSING STRATEGY, EcoNW 12/4/19 (emphasis added)*



## Land Use Regulations

The following policies focus on ways in which the City can modify its current land use regulations in order to increase housing affordability and available housing stock. Policies are broken into two categories: those that affect regulatory changes, and those which increase the land available for housing.

...

Strategy Name	Description	Scale of Impact
Allow Small Residential Lots	<p>Small residential lots are generally less than 5,000 sq. ft. and sometimes closer to 2,000 sq. ft. This policy allows individual small lots within a subdivision. Small lots can be allowed outright in the minimum lot size and dimensions of a zone, or they could be implemented through the subdivision or planned unit development ordinances.</p> <p>This policy is intended to increase density and lower housing costs. Small-lots limit sprawl, contribute to a more efficient use of land, and promote densities that can support transit. Small lots also provide expanded housing ownership opportunities to broader income ranges and provide additional variety to available housing types.</p> <p>Cities across Oregon allow small residential lots, including many cities in the Metro area.</p>	<p><b>Scale of Impact – Small to moderate.</b> Cities have adopted minimum lot sizes as small as 2,000 sq. ft. However, it is uncommon to see entire subdivisions of lots this small. Small lots typically get mixed in with other lot sizes. This tool generally increases density and amount of single-family detached and townhouse housing in a given area, decreasing housing costs as a result of decreasing amount of land on the lot.</p>

*City of Tualatin 2040: Policy Priorities, December 2019 Final, APPENDIX B: HOUSING STRATEGY, EcoNW 12/4/19 (emphasis added)*

The City’s technical team advised the City to modify land use regulations to allow small-lot subdivisions and lot size averaging to increase efficiency of development, expand home ownership opportunities, and provide a variety of lot sizes to improve affordability. The Citizen Advisory Committee (CAC) moved this concept forward as a recommendation to adopt a Planned Unit Development ordinance to allow flexibility in development standards and housing types.

## Housing Needs Analysis

Concurrent with acknowledgement of the *City of Tualatin 2040: Policy Priorities* in 2019, the City Council accepted an updated Housing Needs Analysis (HNA) and Buildable Land Inventory (BLI), addressing Statewide Planning Goal 10: Housing. Those documents demonstrated a need for all housing types to be provided in the 20-year period ending in 2040. As part of this needed housing, at least 40 percent was forecast to be provided as single-family detached housing and only 15 percent of new housing (152 dwelling units) was forecast to be provided as single-family attached housing. While the City must look at permitting middle-housing opportunities within lower-density districts, as recommended by the HNA and required by House Bill 2001, the inclusion of single-family detached housing that meets the density requirements of the underlying zoning district will also improve the availability of housing – helping meet the City’s planned need for 1,014 additional new dwelling units within the coming 20 years.

## Housing Trends

Within the Basalt Creek Planning Area (BCPA), Medium Low-Density Residential accounts for 72 acres, or 3 percent of the city’s total land inventory, of which 69 acres are considered unconstrained and buildable. As documented in the HNA, there was a surplus of 27 acres of gross buildable land needed to accommodate the future population forecast within the RML Zone.

The HNA indicates a number of demographics and housing trends for the city. Single-family detached housing accounts for 53 percent of dwelling units in the city, a smaller number by percentage than Washington County (61 percent) and the region as a whole (63 percent). Reflecting this mix of housing,

homeownership in Tualatin was only 55 percent, versus 61 percent in Washington County and 60 percent in the Portland Region. Of those homeowners in the city, 88 percent live in single-family detached housing.

Nationally, homeownership trends are increasing after the rise of homeownership rates of young adults. According to the HNA, the homeownership rate increased from 62.9 percent to 63.7 percent over the course of 2016-2017. According to the U.S. Census Bureau, this rate has further increased to 65.3 percent in the first quarter of 2020. Current market trends are likely to raise this rate. During this time, the characteristics of housing have also changed to include construction of homes on smaller lots with small yards. Demand for these types of housing are likely to rise similarly in Tualatin. Providing the opportunity for more single-family detached housing will provide an increased opportunity for home ownership in Tualatin – meeting projected needs and the increased demands for home ownership.

Of the dwellings needed over the next 20 years, 43 percent of the forecast households in the city will be in the Basalt Creek Planning Area (BCPA). At the forecast density for the RML district, 10.5 dwelling units per gross acre, this equates to roughly 42 acres needed. The applicants are proposing that the text amendment affect  $\pm 57.79$  acres. At the densities currently required, and assuming 30 percent of the gross area being required for street rights-of-way and other facilities such as stormwater, this could potentially provide the opportunity for between 323 and 404 dwelling units. This does not include the other areas of RML-zoned lands within the BCPA (another 14 acres of land) or other types of residential zoning (88 buildable acres) within the BCPA. By approving the application for a text amendment, the property owners and developers can move to provide this needed housing at the densities prescribed by the HNA and Tualatin Development Code (TDC). These changes will help improve rates of homeownership within Tualatin while also making the best use of the available lands.

### **Diversity of Housing**

*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. (HNA Executive summary, p. XII)*

*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. (HNA Executive summary, p. XI)*

The HNA calls for the addition of more types of housing. This application does not propose to remove any permitted types of housing—Multi-family and middle housing are a valuable contribution to a city's housing inventory. The misplacement of this housing, however, does not benefit renters—it places them further from centers of employment, commerce, and adequate transportation. Increasing their costs of living in addition to those associated with housing. The action items from Tualatin 2040 include finding land to rezone to higher densities close to urban services and transit.

*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. (HNA Executive summary, p. XIII)*

This area is not suitable for high density housing types such as apartment-style multi-family because of the distances between shopping, dining, employment, transit, and other services. This location is on the outskirts of Tualatin's Urban Growth Boundary (UGB), ensuring that residents of this neighborhood will be more inclined towards driving due to a lack of nearby goods and services.

*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 single-family housing. This includes providing opportunities for development of smaller single-family detached homes, townhomes, and multifamily housing. (HNA, p. 74)*

The residential market has moved toward houses on smaller lots with less yard and less street frontage. These developments allow for less land cost for each dwelling unit, allowing for "more home for the money." Buyers place less value on yards that require time for maintenance. Examples of these small lot developments can be found in Wilsonville, Hillsboro, and Tigard. Providing opportunities for development of smaller single-family detached homes will encourage the construction of attainable housing. This application allows for the smaller single-family detached housing called for in the HNA.

### **Challenges of Existing Code**

The applicants considered providing single-family detached housing through the Small Lot Subdivision provisions of TDC 36.410. Unfortunately, we found that within the RML zone, meeting the density requirements would be difficult, would result in a monochromatic development, and be subject to a highly discretionary process.

The existing development code provides a path for a "Small Lot Subdivision" subject to a Conditional Use Permit. The uncertainty, additional review, and extended timeline of a Conditional Use Permit are all barriers to housing as described in the Tualatin 2040 document. More importantly, the Small Lot provisions do not allow for Lot Size Averaging as proposed in the Lennar/Venture Text Amendment. The Small Lot provisions require a minimum lot size of 4,500 square feet which does not permit a project to achieve maximum density. If all lots are sized at exactly 4,500 square feet, the maximum density possible is 9.68 dwelling units per acre, less than the 10 dwelling units per acre allowed by the zone.

The minimum lot width is 50 feet, the minimum lot depth is 90 feet, and the minimum lot size is 4,500 square feet. With these standards, every lot will be exactly the same with no diversity. Averaging lot sizes and allowing smaller minimum lot sizes provides an opportunity to meet the density requirements of the district and provide a variety of lot widths and housing styles to break up repetitive development. The proposed code changes will allow the same number of homes to be provided while retaining the character of surrounding neighborhoods and providing more diverse housing options.

## Medium Low-Density Residential District

The district is designed to serve as a transitional zone between Low-Density Residential, which only permits detached single-family residences outright, and Medium High-Density Residential, which only permits multi-family dwellings outright. Despite being a transitional zone, the RML district does not currently permit detached single-family residential dwellings without a conditional use permit. The RML district should permit those types of dwellings where they can be provided in a density satisfactory to the City's HNA.

### TDC 5.040. - Planning District Objectives.

- (2) *Medium-Low Density Residential Planning District (RML).* To provide areas of the City suitable for commonwall dwellings such as condominiums, townhouses, duplexes, triplexes, and other multi-family dwellings. Condominiums and small lot subdivisions may be allowed by conditional use permit. Owner occupancy of dwelling units shall be encouraged. Parks for manufactured dwellings shall be allowed in those portions of the district designated on the Plan Map. Except for retirement housing and nursing and convalescent homes which shall not exceed 15 dwelling units per net acre and manufactured dwelling parks with single-wide manufactured dwellings which shall not exceed 12 dwelling units per net acre, the maximum density of any residential use shall not exceed ten dwelling units per net acre. The raising of agricultural animals and the construction of agricultural structures may be allowed by conditional use permit in those portions of the District designated on the Plan Map.

The Text Amendment proposed by the Applicants requires an additional modification to the existing purpose statement above. The Applicants propose an additional modification as shown below:

- (2) *Medium-Low Density Residential Planning District (RML).* To provide areas of the City suitable for commonwall dwellings such as condominiums, townhouses, duplexes, triplexes, and other multi-family dwellings. Condominiums and small lot subdivisions may be allowed by conditional use permit. **Detached housing is permitted for projects over 15 acres in size within the Basalt Creek Planning Area.** Owner occupancy of dwelling units shall be encouraged. Parks for manufactured dwellings shall be allowed in those portions of the district designated on the Plan Map. Except for retirement housing and nursing and convalescent homes which shall not exceed 15 dwelling units per net acre and manufactured dwelling parks with single-wide manufactured dwellings which shall not exceed 12 dwelling units per net acre, the maximum density of any residential use shall not exceed ten dwelling units per net acre. The raising of agricultural animals and the construction of agricultural structures may be allowed by conditional use permit in those portions of the District designated on the Plan Map.

This additional sentence is needed to acknowledge the proposed amendment to the development code; it is not a substantive change to the proposal.



## Conclusion

This text amendment and associated future projects will encourage the provision of needed housing and affordable housing options to the local community. As noted by the City's adopted studies, detached single-family residences are needed and play a large role in helping accommodate expected demand over the next 20 years. These types of housing are currently permitted through existing processes, but with significant dimensional limitations with a highly discretionary review process. This application provides for this type of housing while not diminishing the opportunities for this zone to continue providing other types of housing when and where they are most appropriate.

We look forward to discussing this matter with the City Council on August 10, 2020.

Sincerely,

**AKS ENGINEERING & FORESTRY, LLC**



Mimi Doukas, AICP, RLA  
12965 SW Herman Road, Suite 100  
Tualatin, OR 97062  
(503) 563-6151 | mimid@aks-eng.com

---

# City of Tualatin

## Housing Needs Analysis

---

December 2019

Prepared for:

City of Tualatin

**FINAL REPORT**

**ECONorthwest**  
ECONOMICS • FINANCE • PLANNING

KOIN Center  
222 SW Columbia Street  
Suite 1600  
Portland, OR 97201  
503.222.6060

This page intentionally blank

# Table of Contents

<b>ACKNOWLEDGEMENTS</b>	<b>IV</b>
<b>EXECUTIVE SUMMARY</b>	<b>VII</b>
WHAT ARE THE KEY HOUSING NEEDS IN TUALATIN?	VII
HOW MUCH GROWTH IS TUALATIN PLANNING FOR?	VIII
HOW MUCH BUILDABLE RESIDENTIAL LAND DOES TUALATIN CURRENTLY HAVE?	IX
HOW MUCH HOUSING WILL TUALATIN NEED?	IX
HOW MUCH LAND WILL BE REQUIRED FOR HOUSING?	X
WHAT ARE THE KEY FINDINGS OF THE HOUSING NEEDS ANALYSIS?	XI
<b>1. INTRODUCTION</b>	<b>1</b>
FRAMEWORK FOR A HOUSING NEEDS ANALYSIS	1
ORGANIZATION OF THIS REPORT	5
<b>2. RESIDENTIAL BUILDABLE LANDS INVENTORY</b>	<b>6</b>
DEFINITIONS	6
DEVELOPMENT CONSTRAINTS	7
BUILDABLE LANDS INVENTORY RESULTS	7
<b>3. HISTORICAL AND RECENT DEVELOPMENT TRENDS</b>	<b>13</b>
DATA USED IN THIS ANALYSIS	14
TRENDS IN HOUSING MIX	15
SIZE OF UNITS	18
TRENDS IN HOUSING DENSITY	20
TRENDS IN TENURE	21
VACANCY RATES	24
RENT-RESTRICTED HOUSING	25
MANUFACTURED HOMES	26
<b>4. DEMOGRAPHIC AND OTHER FACTORS AFFECTING RESIDENTIAL DEVELOPMENT IN TUALATIN</b>	<b>27</b>
DEMOGRAPHIC AND SOCIOECONOMIC FACTORS AFFECTING HOUSING CHOICE	28
REGIONAL AND LOCAL TRENDS AFFECTING AFFORDABILITY IN TUALATIN	57
SUMMARY OF THE FACTORS AFFECTING TUALATIN'S HOUSING NEEDS	73
<b>5. HOUSING NEED IN TUALATIN</b>	<b>77</b>
PROJECT NEW HOUSING UNITS NEEDED IN THE NEXT 20 YEARS	77
NEEDED HOUSING BY INCOME LEVEL	84
NEED FOR GOVERNMENT-ASSISTED AND MANUFACTURED HOUSING	85
<b>6. RESIDENTIAL LAND SUFFICIENCY WITHIN TUALATIN</b>	<b>88</b>
CAPACITY ANALYSIS	88
RESIDENTIAL LAND SUFFICIENCY	91
CONCLUSIONS AND RECOMMENDATIONS	92
<b>APPENDIX A – RESIDENTIAL BUILDABLE LANDS INVENTORY</b>	<b>95</b>
OVERVIEW OF THE METHODOLOGY	95

# Acknowledgements

---

ECONorthwest prepared this report for the City of Tualatin. ECONorthwest and the City thank the many people who helped to develop the Tualatin Economic Opportunities Analysis.

## Community Advisory Committee

- Alice Galloway Neely
- Angela Handran
- Bryce Payne
- Daniel Bachhuber
- Derek Reinke
- Joe Lipscomb
- Katherine Galian
- Kellye Aprati
- Ken Johnson
- Lainie Magsarili
- Linda Moholt
- Rachael Duke
- Doug Plambeck
- Susan Noack
- Manny Trujillo
- Cyndy Hillier

## Technical Advisory Committee

- Aquilla Hurd-Ravich, Community Development Director
- Karen Perl Fox, Senior Long-Range Planner
- Jonathan Taylor, Economic Development Manager
- Steve Koper, Planning Manager
- Garet Prior, Policy Analyst
- Lauren Gonzalez, Permit Coordinator
- Tanya Williams, Assistant to the City Manager
- Betsy Ruef, Community Engagement Coordinator
- Ross Hoover, Parks and Recreation Director
- Rich Mueller, Parks and Recreation Manager
- Mike McCarthy, Principal Transportation Engineer
- Sean Brady, City Attorney
- Anne Debbaut/Kirstin Greene, DLCD Representatives
- Hector Rodriguez, ODOT representative
- Stu Peterson, Macadam Forbes
- Ken Gertz, Gertz Fine Homes
- Jeff Raker, Metro
- Ezra Hammer, Home Builders Association
- Katrina Holland, Community Alliance of Tenants
- Komi Kalevor, Washington County Housing Authority
- Ken Rencher, Washington County
- Melissa Dailey, Washington County

## **City of Tualatin Project Management Team**

- Aquilla Hurd-Ravich, Community Development Director
- Steve Koper, Planning Manager
- Karen Perl Fox, Senior Long-Range Planner (T2040 Project Manager)
- Jonathan Taylor, Economic Development Manager
- Gareth Prior, Policy Analyst

## **Consulting Team (ECONorthwest)**

- Beth Goodman, Project Director
- Margaret Raimann, Technical Manager
- Sadie DiNatale, Associate

## **Interpreters**

- Rosa Galvan
- Armando Gutierrez

### **City of Tualatin Contact:**

Karen Perl Fox, Senior Planner  
City of Tualatin  
18880 SW Martinazzi Avenue  
Tualatin, OR 97756  
503-691-3027  
kperlfox@tualatin.gov

### **ECONorthwest Contact:**

Beth Goodman, Project Director  
ECONorthwest  
222 SW Columbia, Suite 1600  
Portland, OR 97201  
503-222-6060  
goodman@econw.com

This page intentionally blank

# 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.

<b>10,791</b>	<b>11,362</b>	<b>571</b>	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.

<b>203</b>	<b>646</b>	<b>443</b>	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
<b>Residential</b>			
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
<b>Commercial</b>			
Mixed-Use Commercial Overlay Zone	0	0	0
Central Tualatin Overlay Zone	0	0	0
<b>Basalt Creek Planning Area</b>			
Low Density Residential	76	2	74
Medium Low Density Residential	69	49	20
High Density Residential	5	0	5
Neighborhood Commercial	0	0	0
<b>Total</b>	<b>244</b>	<b>75</b>	<b>168</b>

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).<sup>1</sup> 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.<sup>2</sup>
- (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.

---

<sup>1</sup> ORS 197.296 only applies to cities with populations over 25,000.

<sup>2</sup> 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.<sup>3</sup>

## 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.

---

<sup>3</sup> 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).<sup>4</sup>

---

<sup>4</sup> 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
<b>Residential</b>						
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%
<b>Commercial</b>						
Mixed-Use Commercial Overlay Zone	-	-	25	-	25	1%
Central Tualatin Overlay Zone	3	-	29	6	37	1%
<b>Basalt Creek Planning Area</b>						
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%
<b>Total</b>	<b>95</b>	<b>268</b>	<b>1,548</b>	<b>645</b>	<b>2,556</b>	<b>100%</b>

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
<b>Residential</b>				
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
<b>Commercial</b>				
Mixed-Use Commercial Overlay Zone	25	20	5	0
Central Tualatin Overlay Zone	37	16	21	0
<b>Basalt Creek Planning Area</b>				
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
<b>Total</b>	<b>2,556</b>	<b>1,747</b>	<b>566</b>	<b>244</b>

## 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

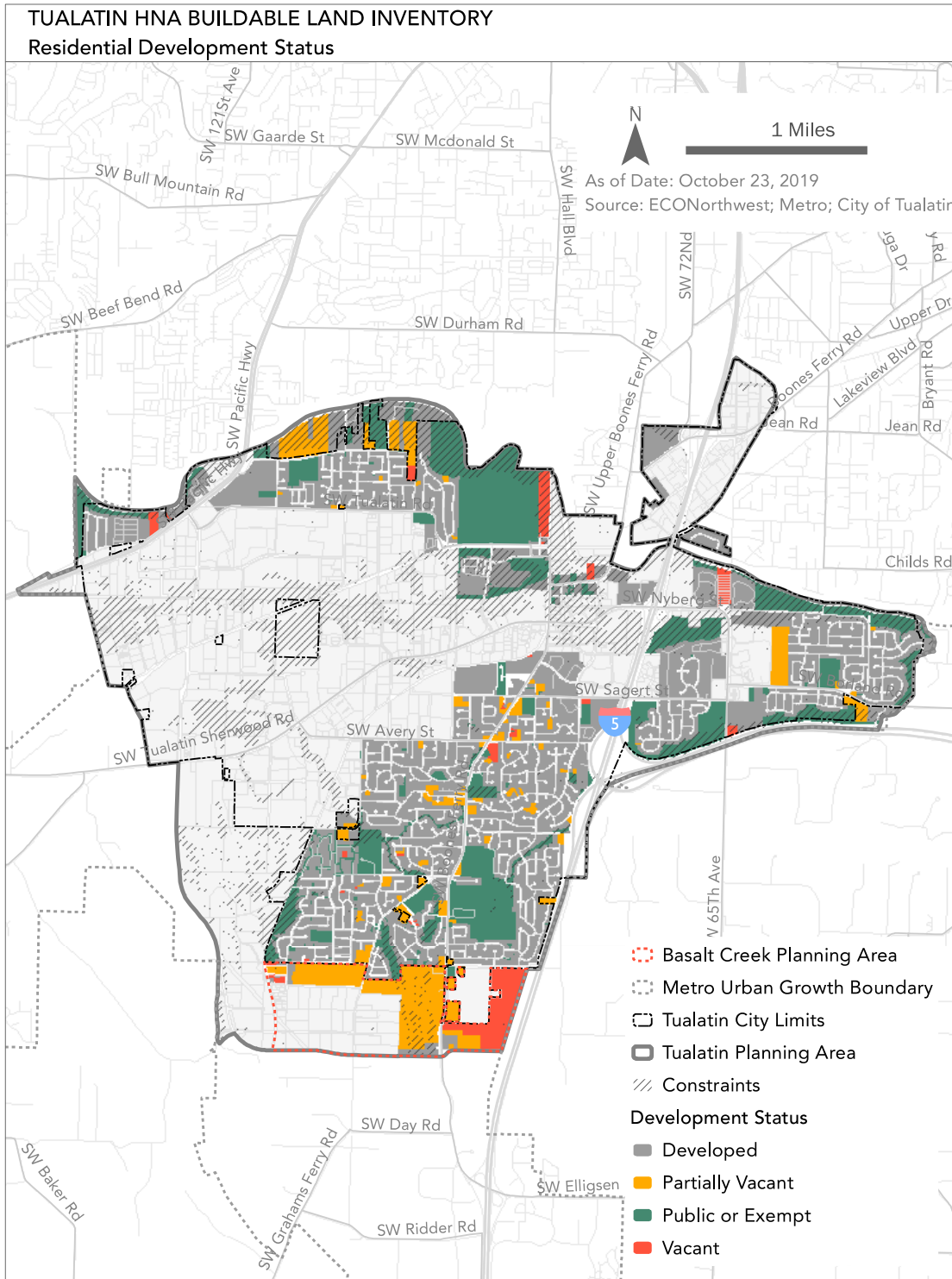
Source: Metro BLI, ECONorthwest Analysis. Note: The numbers in the table may not sum to the total as a result of rounding.

Generalized Plan Designation	Total buildable acres	Buildable acres on vacant lots	Buildable acres on partially vacant lots
<b>Residential</b>			
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
<b>Commercial</b>			
Mixed-Use Commercial Overlay Zone	0	0	0
Central Tualatin Overlay Zone	0	0	0
<b>Basalt Creek Planning Area</b>			
Low Density Residential	76	2	74
Medium Low Density Residential	69	49	20
High Density Residential	5	0	5
Neighborhood Commercial	0	0	0
<b>Total</b>	<b>244</b>	<b>75</b>	<b>168</b>

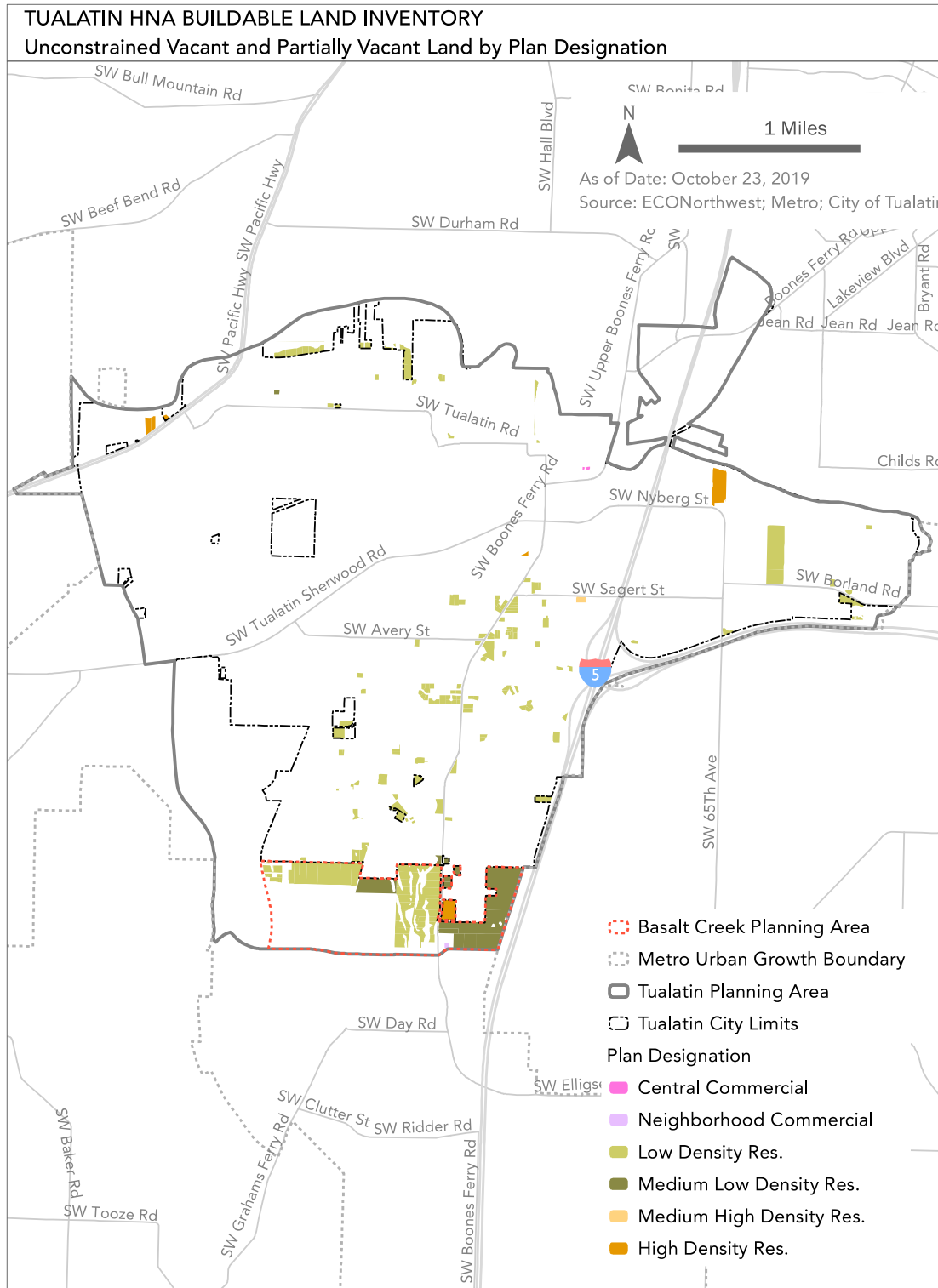
Exhibit 8 and 5 (upcoming pages) show the results of Tualatin’s residential BLI.



**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).<sup>5</sup>

The foundation of the housing needs analysis is the population forecast for Tualatin from Metro's *2040 Household Distributed Forecast*.

---

<sup>5</sup> 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.<sup>6</sup> 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).

---

<sup>6</sup> 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>

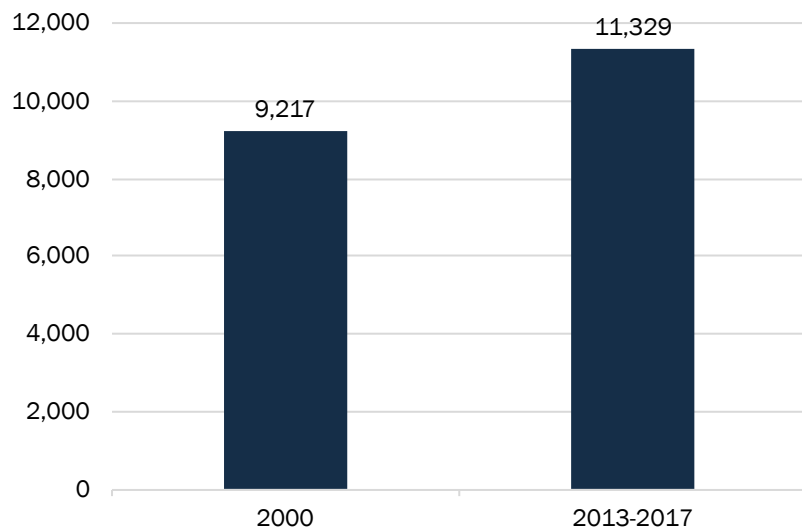
## Housing Mix

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**

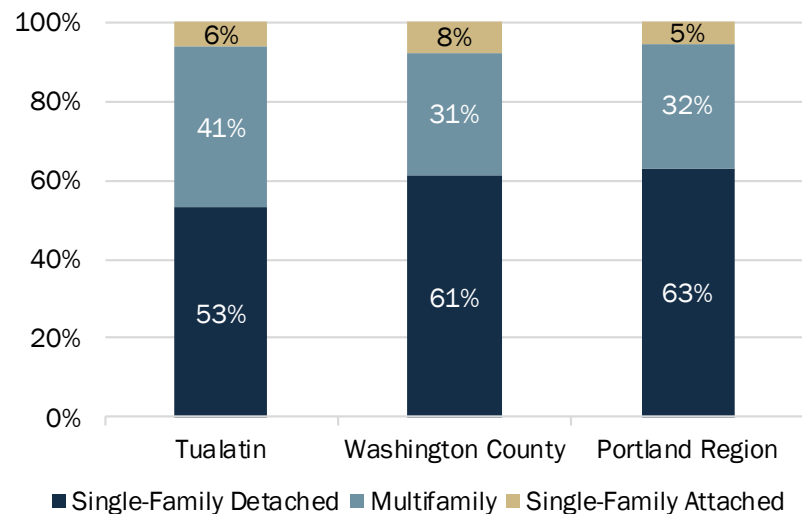
Source: U.S. Census Bureau, 2000 Decennial Census, SF3 Table H030, and 2013-2017 ACS Table B25024.



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**

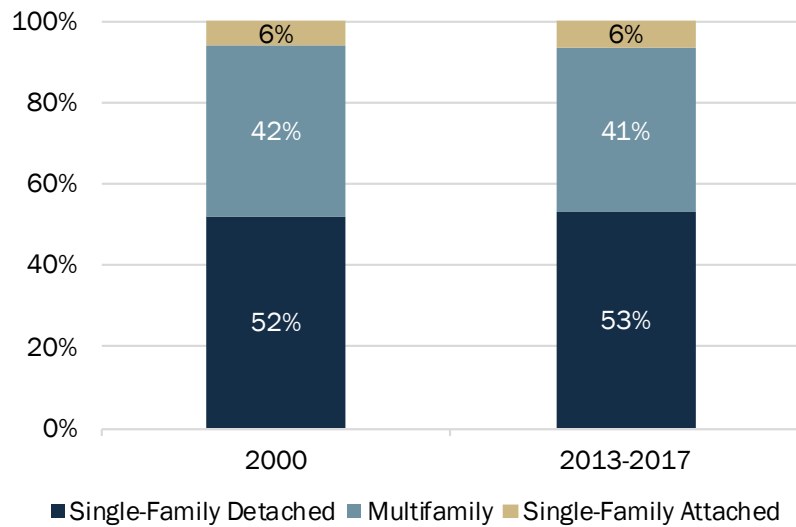
Source: U.S. Census Bureau, 2013-2017 ACS Table B25024.



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.



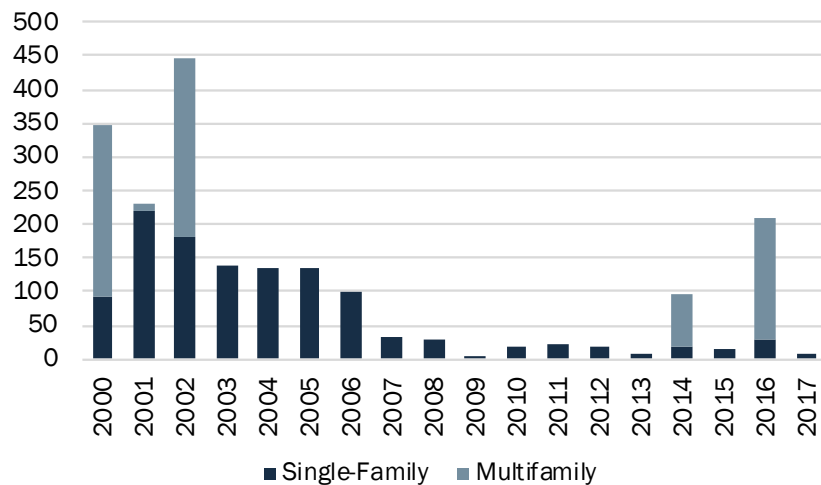
## Dwelling Units Built

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.



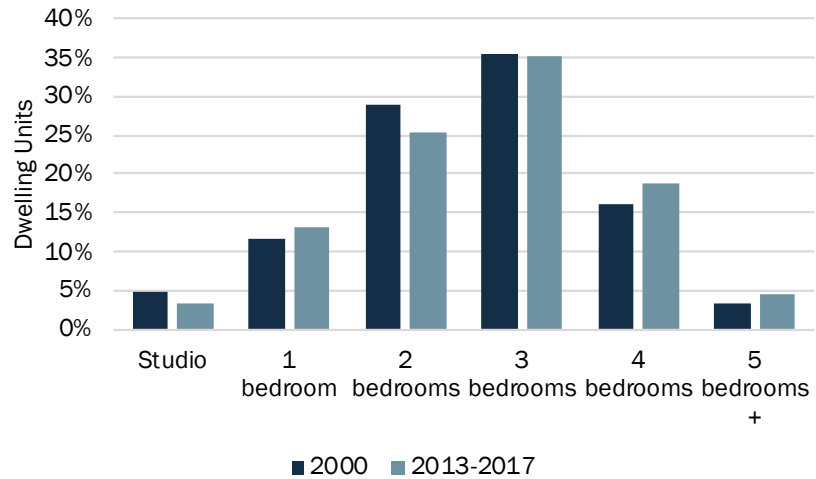
# Size of Units

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.

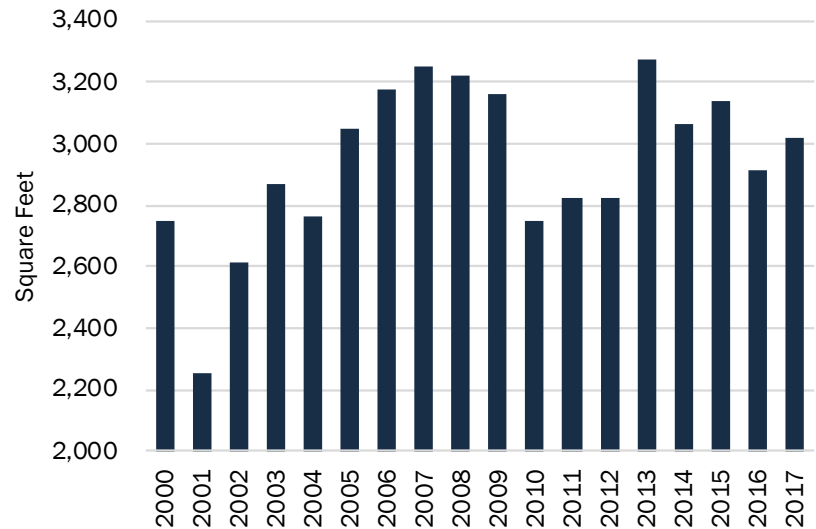


**Single-family units built in Tualatin since 2000, averaged 2,773 sq. ft. per unit.**

**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.

<b>2000:</b>	<b>1,172 Sq. Ft.</b> Condominium
<b>2001:</b>	<b>1,562 Sq. Ft.</b> Condominium
<b>2002:</b>	<b>892 Sq. Ft.</b> Apartment
<b>2014:</b>	<b>1,322 Sq. Ft.</b> Retirement Facility
<b>2016:</b>	<b>977 Sq. Ft.</b> 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
<b>Total</b>	<b>1,207</b>	<b>189</b>	<b>6.4</b>	<b>789</b>	<b>40</b>	<b>19.9</b>	<b>1,996</b>	<b>228</b>	<b>8.7</b>

## Trends in Tenure

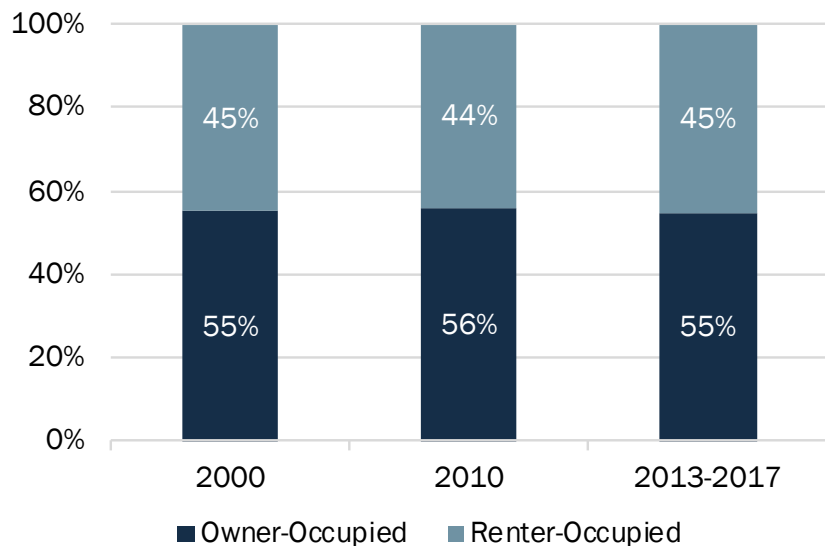
Housing tenure describes whether a dwelling unit is owner- or renter-occupied. This section shows:

- **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**

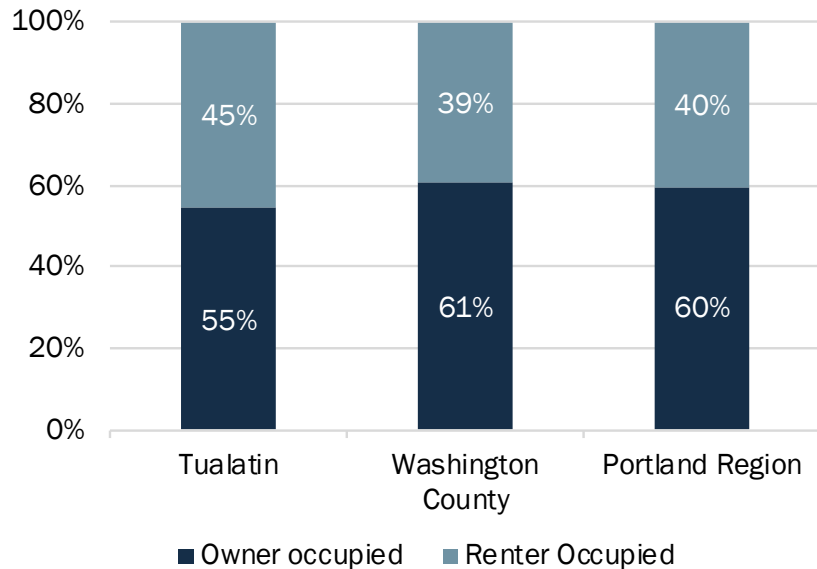
Source: U.S. Census Bureau, 2000 Decennial Census SF1 Table H004, 2010 Decennial Census SF1 Table H4, 2013-2017 ACS Table B24003.



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.

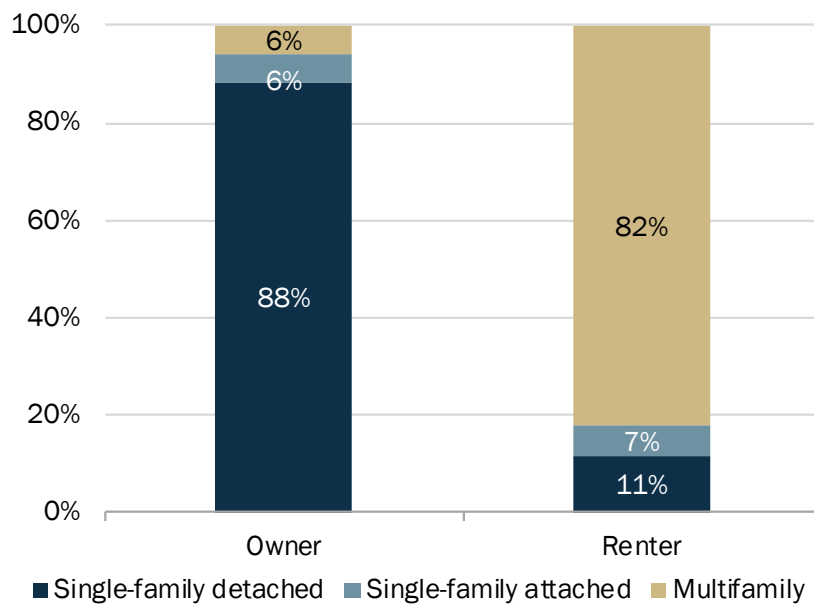


Most of Tualatin homeowners (88%) lived in single-family detached housing.

In comparison, most of Tualatin renters lived in multifamily housing.

**Exhibit 21. Housing Units by Type and Tenure, Tualatin, 2013-2017**

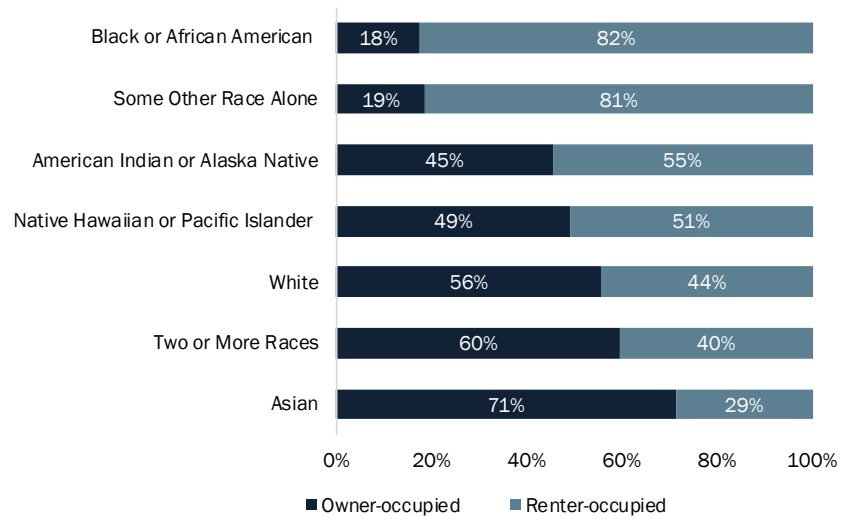
Source: U.S. Census Bureau, 2013-2017 ACS Table B25032.



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

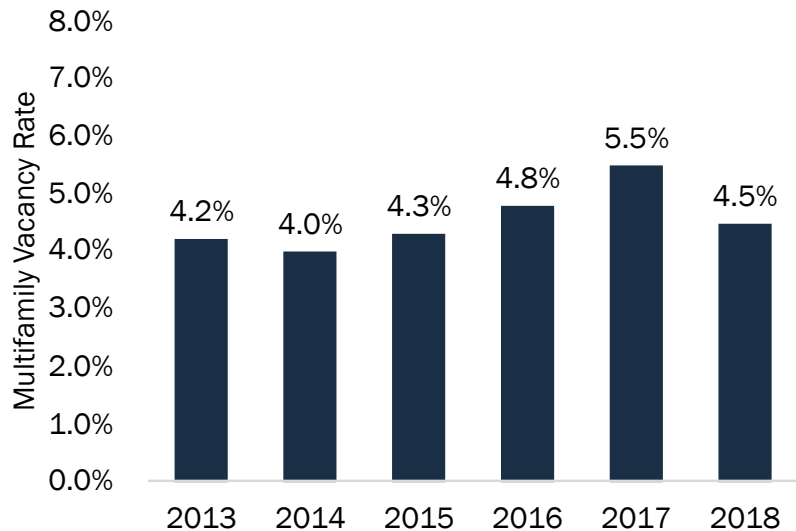
Source: U.S. Census Bureau, 2000 Decennial Census SF1 Table H005, 2013-2017 ACS Table B25004.

<b>2000</b>	<b>6.2%</b> Of Total Dwelling Units
<b>2013-2017</b>	<b>4.3%</b> 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.

<b>2000</b>	<b>43 Units</b>	<b>0.5%</b>
		Share of Total Dwelling Units
<b>2013-2017</b>	<b>44 Units</b>	<b>0.4%</b>
		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
<b>Total</b>	<b>604</b>	<b>604</b>			

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.<sup>7</sup>

<sup>7</sup> More information about Housing Choice Vouchers: [https://www.hud.gov/program\\_offices/public\\_indian\\_housing/programs/hcv/about/fact\\_sheet](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.<sup>8</sup> 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
<b>Total</b>			<b>178</b>	<b>3</b>	

---

<sup>8</sup> 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 Choice<sup>9</sup>

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).

---

<sup>9</sup> 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 Trends<sup>10</sup>

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,

---

<sup>10</sup> 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,<sup>11</sup> 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.**<sup>12</sup> 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

---

<sup>11</sup> 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.

<sup>12</sup> 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](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.<sup>13</sup> 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.”<sup>14</sup> 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.<sup>15</sup> 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.”<sup>16</sup> 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.”<sup>17</sup>

- *Millennials*. Over the last several decades, young adults increasingly lived in multi-generational housing – and increasingly more so than older demographics.<sup>18</sup> 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,

---

<sup>13</sup> Urban Land Institute. Emerging Trends in Real Estate, United States and Canada. 2018.

<sup>14</sup> 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/](https://shelterforce.org/2015/05/30/meeting_the_housing_needs_of_an_aging_population/)

<sup>15</sup> Vanleerberghe, Patricia, et al. The quality of life of older people aging in place: a literature review. 2017.

<sup>16</sup> Ibid.

<sup>17</sup> American Planning Association. Making Space for Tiny Houses, Quick Notes.

<sup>18</sup> 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%.<sup>19</sup> 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,

---

<sup>19</sup> 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:<sup>20</sup>
  - *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)<sup>21</sup>, 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);

---

<sup>20</sup> U.S. Census Bureau, Highlights of Annual 2017 Characteristics of New Housing. Retrieved from: <https://www.census.gov/construction/chars/highlights.html>.

<sup>21</sup> 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.<sup>22</sup>

## 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:<sup>23</sup>

- 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.

---

<sup>22</sup> 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](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.

<sup>23</sup> 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 Oregon<sup>24</sup> 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.<sup>25</sup>

- **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%.

---

<sup>24</sup> 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>

<sup>25</sup> 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.

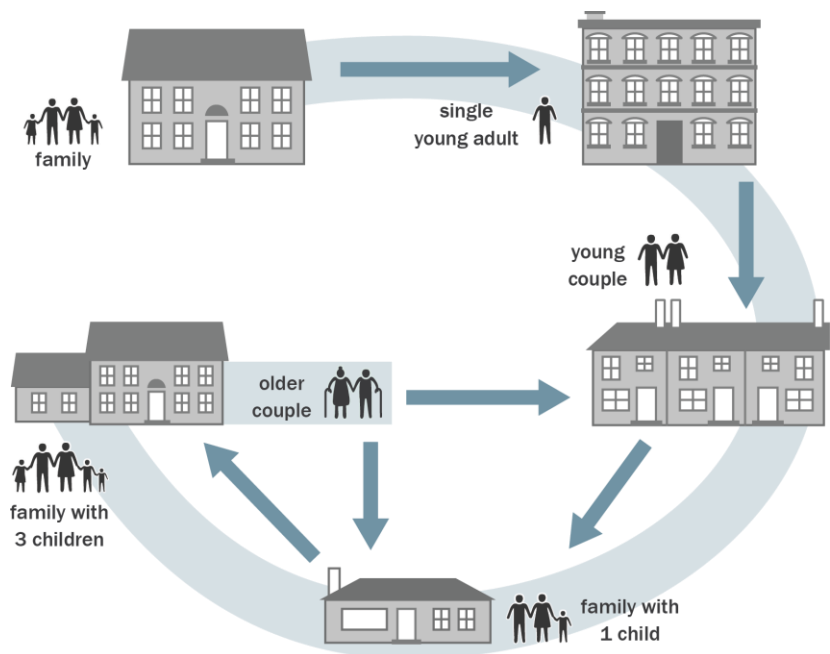
An individual’s housing needs change throughout their life, with changes in income, family composition, and age. The types of housing needed by a 20-year-old college student differ from the needs of a 40-year-old parent with children, or an 80-year-old single adult. As Tualatin’s population ages, different 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%.<sup>26</sup>**

### Exhibit 31. Forecast of Population Growth, Tualatin city limits, 2020 to 2040

Source: Metro 2040 Population Distributed Forecast, Exhibit A. July 12, 2016.

<b>26,745</b>	<b>27,372</b>	<b>627</b>	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%.<sup>27</sup>**

### 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.

<b>535</b>	<b>1,616</b>	<b>1,080</b>	202% increase
Residents in 2020	Residents in 2040	New residents 2020 to 2040	5.68% Growth Rate

<sup>26</sup> 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.

<sup>27</sup> 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.<sup>28</sup> 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.<sup>29</sup>

- **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.<sup>30</sup> 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.

---

<sup>28</sup> 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>.

<sup>29</sup> “Aging in Place: A toolkit for Local Governments” by M. Scott Ball.

<sup>30</sup> 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.<sup>31</sup>

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.<sup>32</sup> 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.

---

<sup>31</sup> 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.

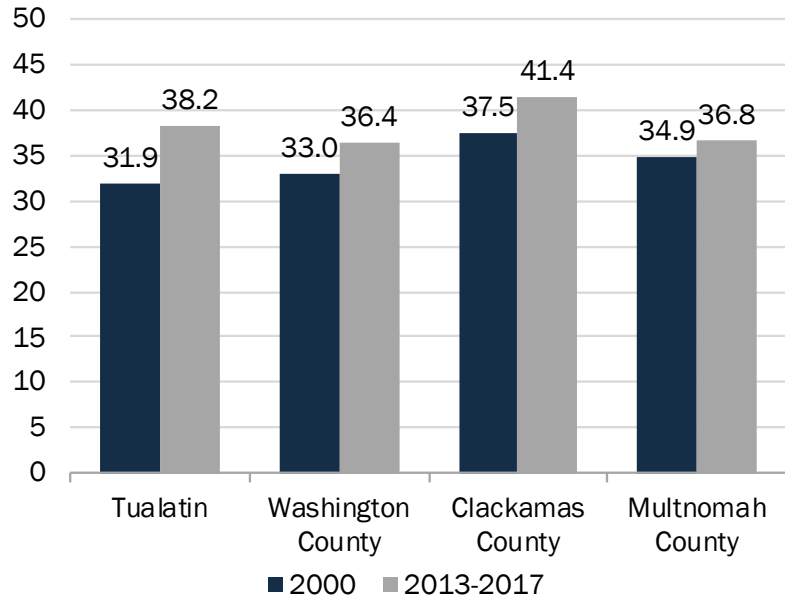
"Survey Says: Home Trends and Buyer Preferences," National Association of Home Builders International Builders

<sup>32</sup> 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.

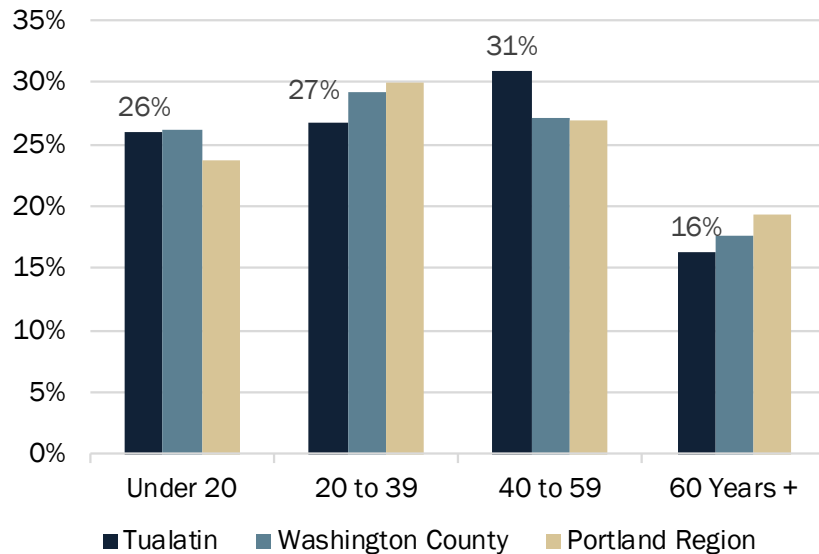


In the 2013-2017 period, about 58% of Tualatin's residents were between the ages of 20 and 59 years.

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**

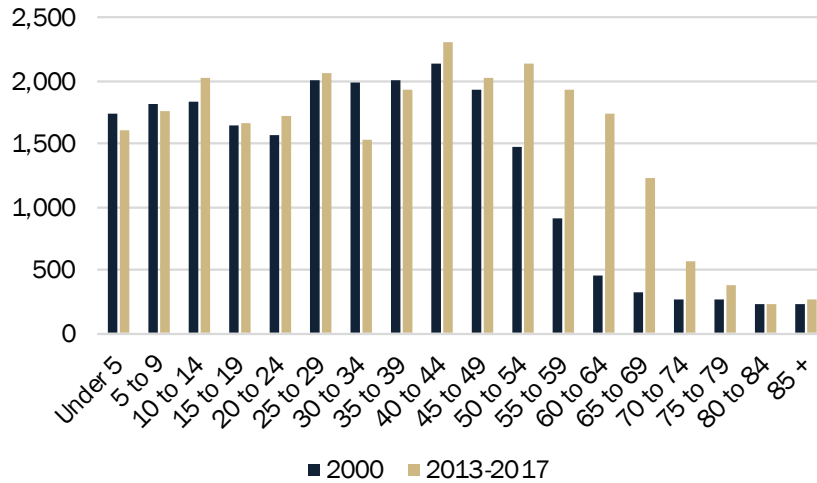
Source: U.S. Census Bureau, 2013-2017 ACS, Table B01001.



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.



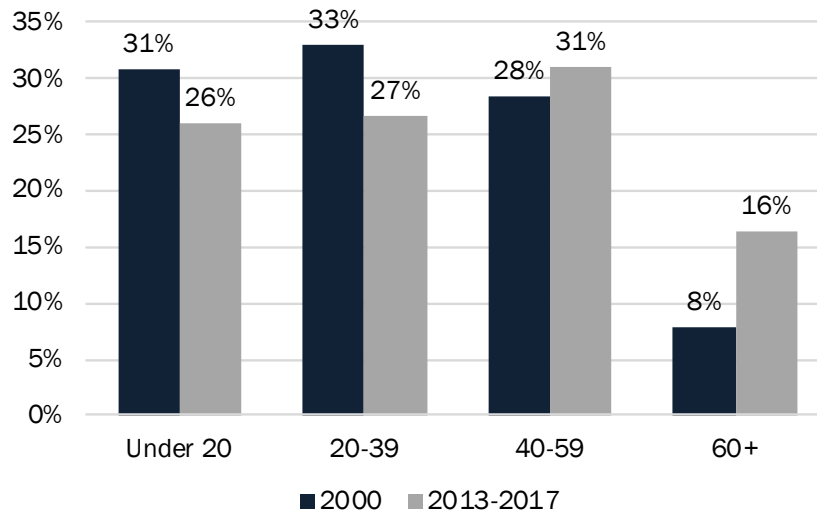
Between 2000 and 2013-2017, the share of Tualatin’s population aged 60 years and older doubled.

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
<b>Under 20</b>	<b>20-39 Yrs</b>	<b>40-59 Yrs</b>	<b>60+ Yrs</b>

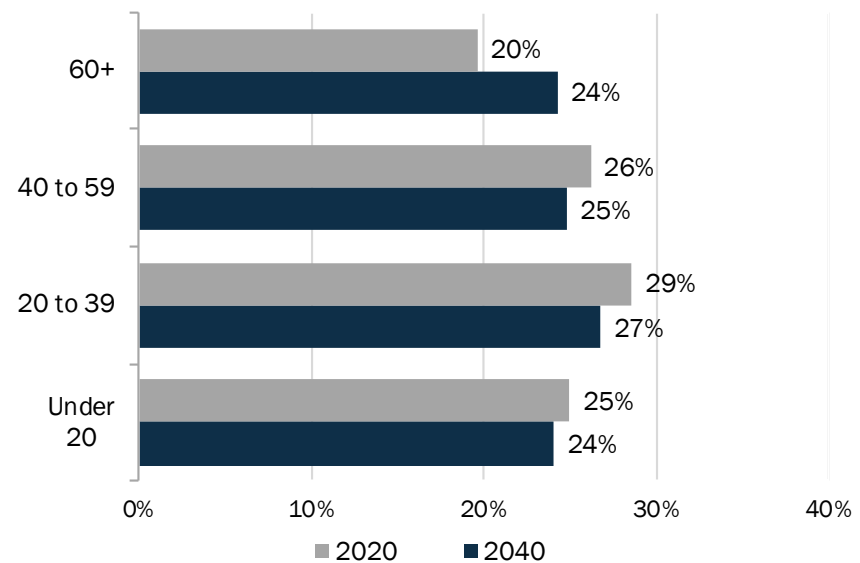


**Between 2020 and 2040, the share of Washington County residents over the age of 40 will make up 49% of the county's total population.**

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.<sup>33</sup>

Continued growth in the Latinx population will affect Tualatin's housing needs in a variety of ways.<sup>34</sup> 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

<sup>33</sup> 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](https://www.census.gov/content/dam/Census/library/publications/2018/demo/P25_1144.pdf)

<sup>34</sup> 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 Professionals<sup>35</sup>, 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 2014<sup>36</sup> to 46.2% in 2017. The only demographic that increased their rate of homeownership from 2016 to 2017 was for Latinx households.

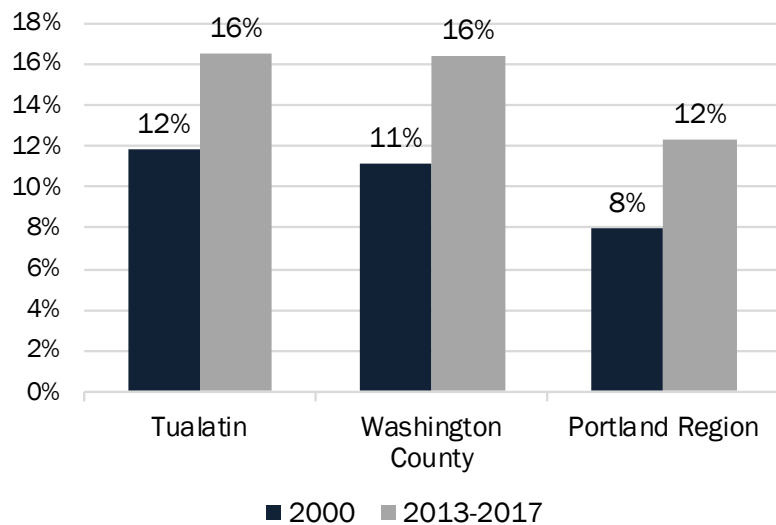
The *State of Hispanic Homeownership* report also cites the lack of affordable housing products as a substantial barrier to homeownership. The report finds that Latinx households are more likely than non-Latinx households to be nuclear households, comprised of married couples with children, and multiple-generation 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.<sup>37</sup> 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.



<sup>35</sup> National Association of Hispanic Real Estate Professionals (2017). *2017 State of Hispanic Homeownership Report*.

<sup>36</sup> Ibid.

<sup>37</sup> Ibid.

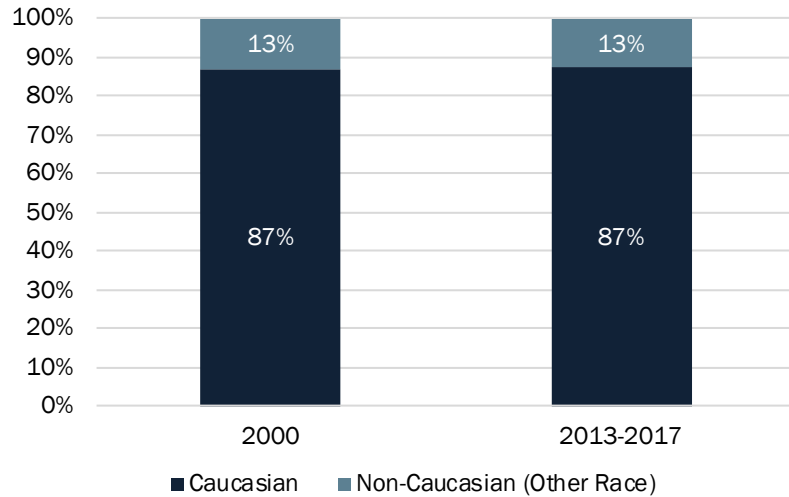
## Racial Diversity<sup>38</sup>

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.

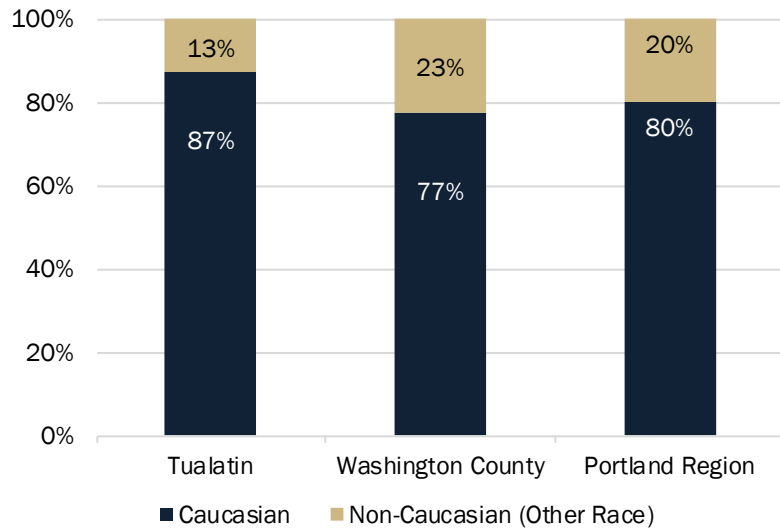


<sup>38</sup> The US Census Bureau considers race and ethnicity as two distinct concepts. The Census applies two categories for ethnicity, which are Hispanic or Latino (i.e., Latinx) and Not Hispanic or Latino (i.e., Non-Latinx). Latinx is an ethnicity and not a race, meaning individuals who identify 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%.

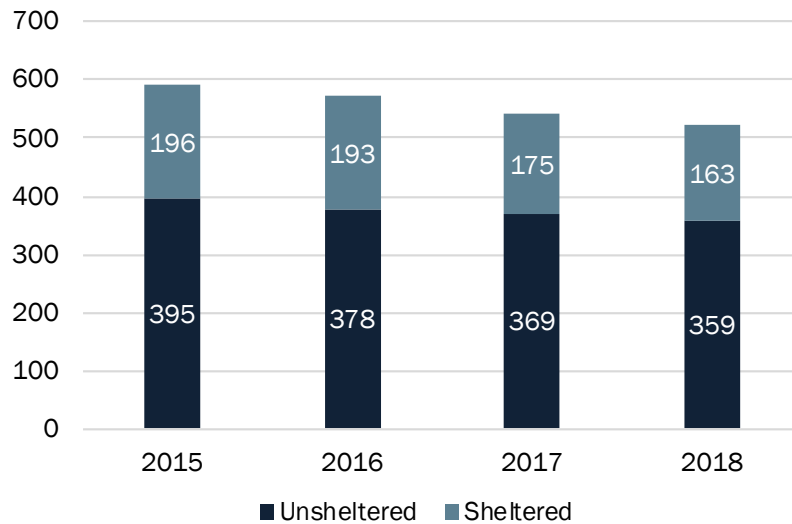
### Exhibit 42. Number of Persons Homeless, Washington County, Point-in-Time Count, 2017 and 2018

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**

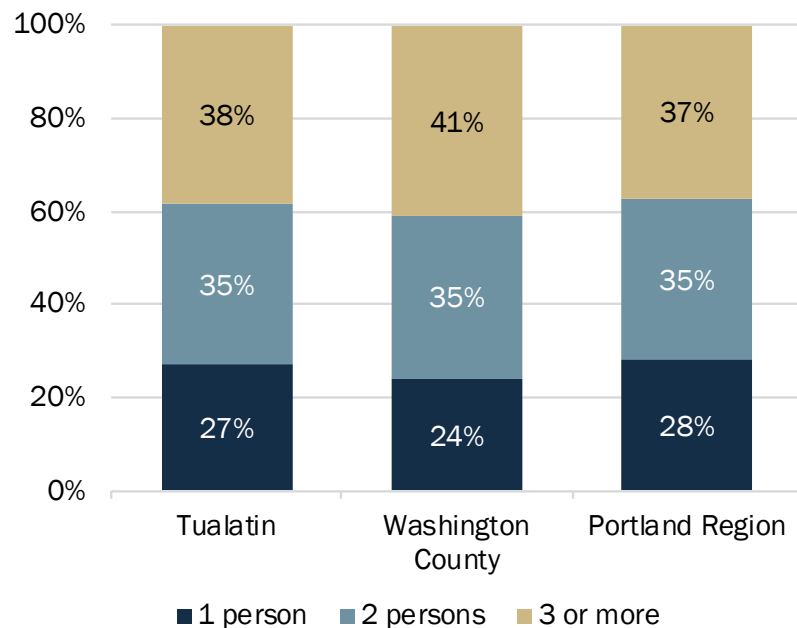
Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B25010.



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.

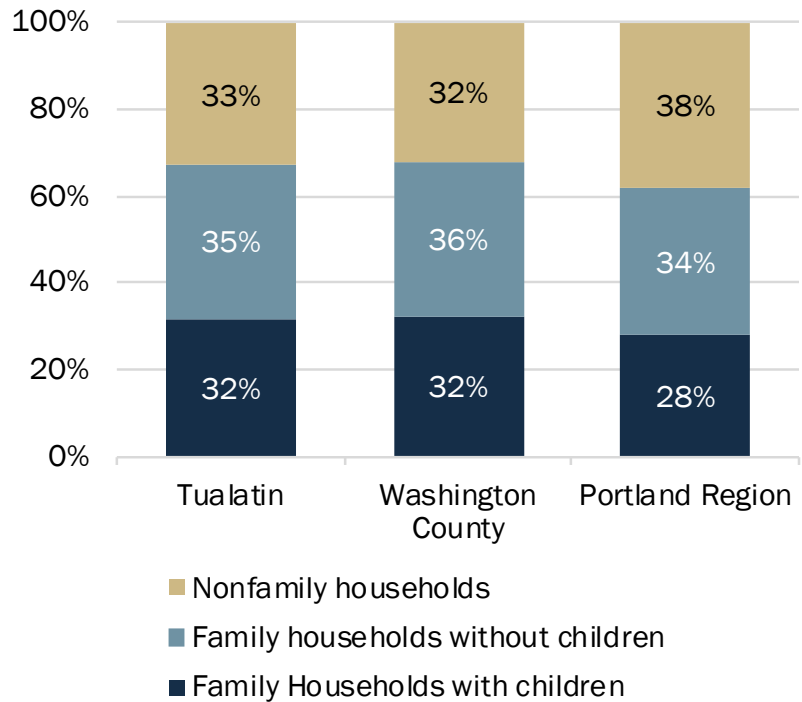


**Tualatin had a similar household composition to Washington County. Compared to the Portland Region, Tualatin had a smaller share of nonfamily households and a larger share of family households with children.**

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

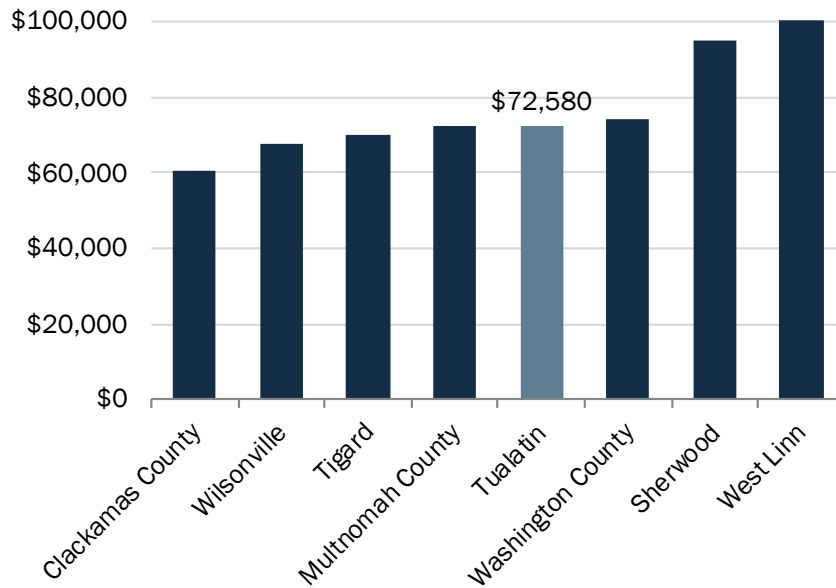
Income is one of the key determinants in housing choice and households' ability to afford housing. Income for residents living in Tualatin was lower than the Washington County median income and the state's.

**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.





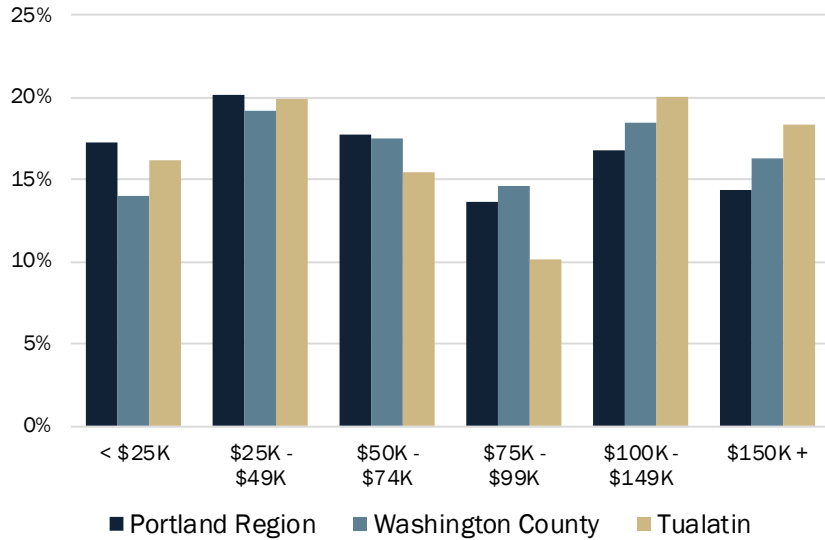
**Tualatin had a larger share of higher-earning households.**

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.

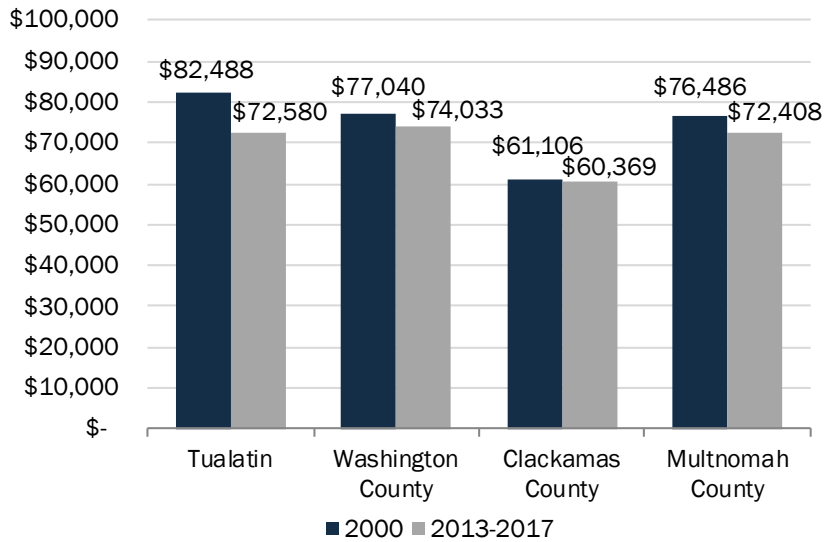


**After adjusting for inflation, Tualatin’s median household income (MHI) decreased by 12%, from \$82,488 in 2000 to \$72,580 in 2013-2017.**

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**

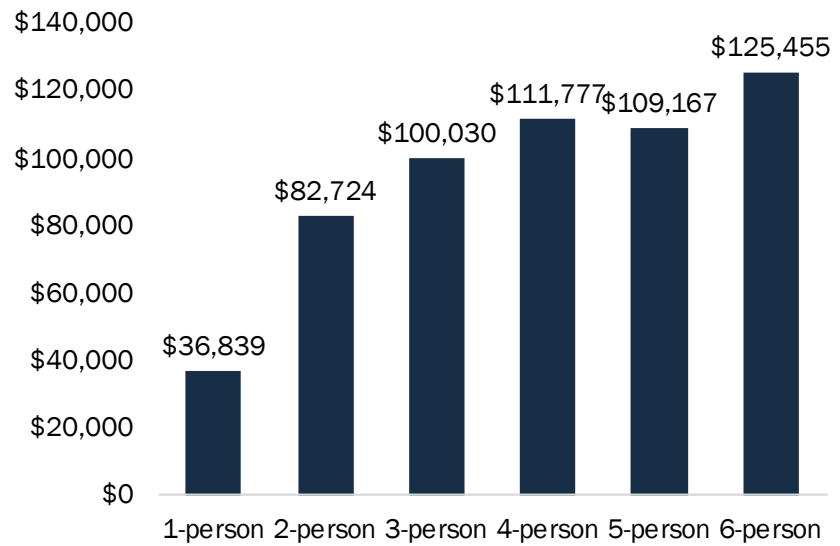
Source: U.S. Census Bureau, 2000 Decennial Census, Table HCT012; 2013-2017 ACS 5-year estimate, Table B25119; Bureau of Labor Statistics Inflation Calculator.



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**

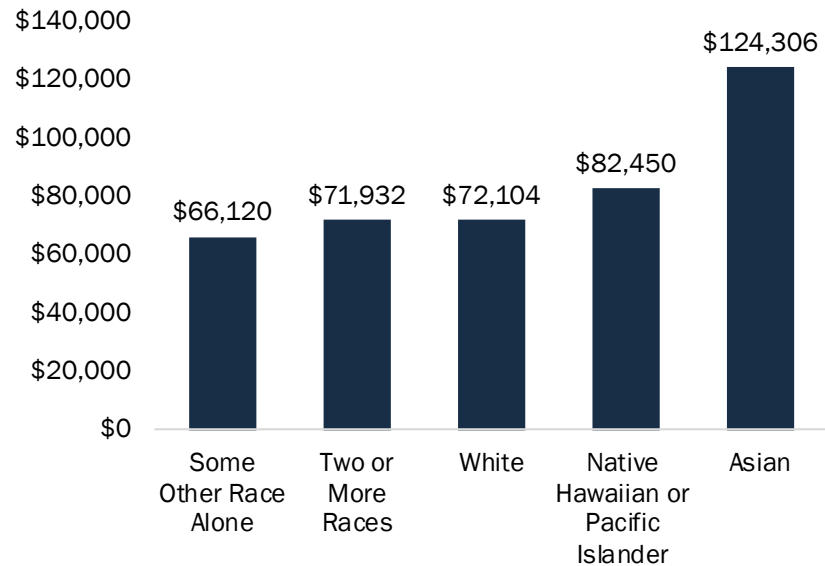
Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B25119.



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**

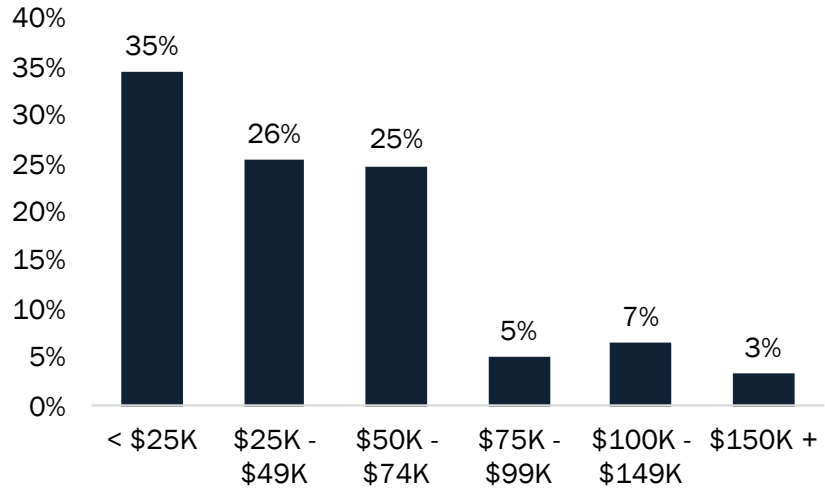
Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B19013A-G. Note: data was not available for heads of households identifying as a Black / African American or as American Indian and Alaska Native.



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**

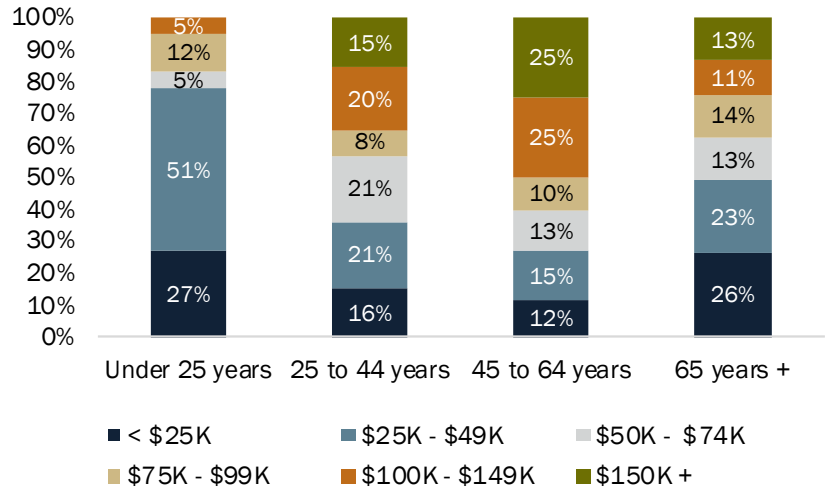
Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B19001I.



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**

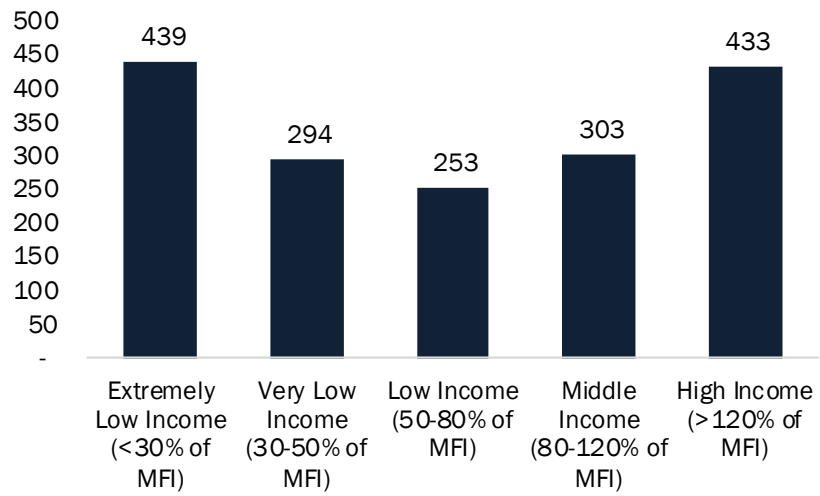
Source: U.S. Census Bureau, 2013-2017 ACS 5-year estimate, Table B19037.



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

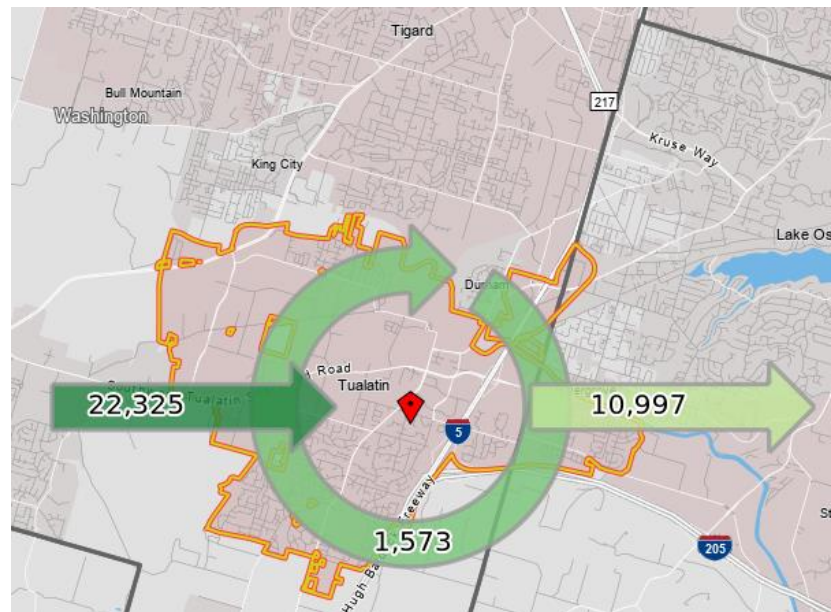
Tualatin is part of the complex, interconnected economy of the Portland Region. Of the more than 23,800 people who work in Tualatin, 93% of workers commute into Tualatin from other areas, most notably Portland, Tigard, Beaverton, and Hillsboro. Almost 11,000 residents of Tualatin commute out of the city 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.

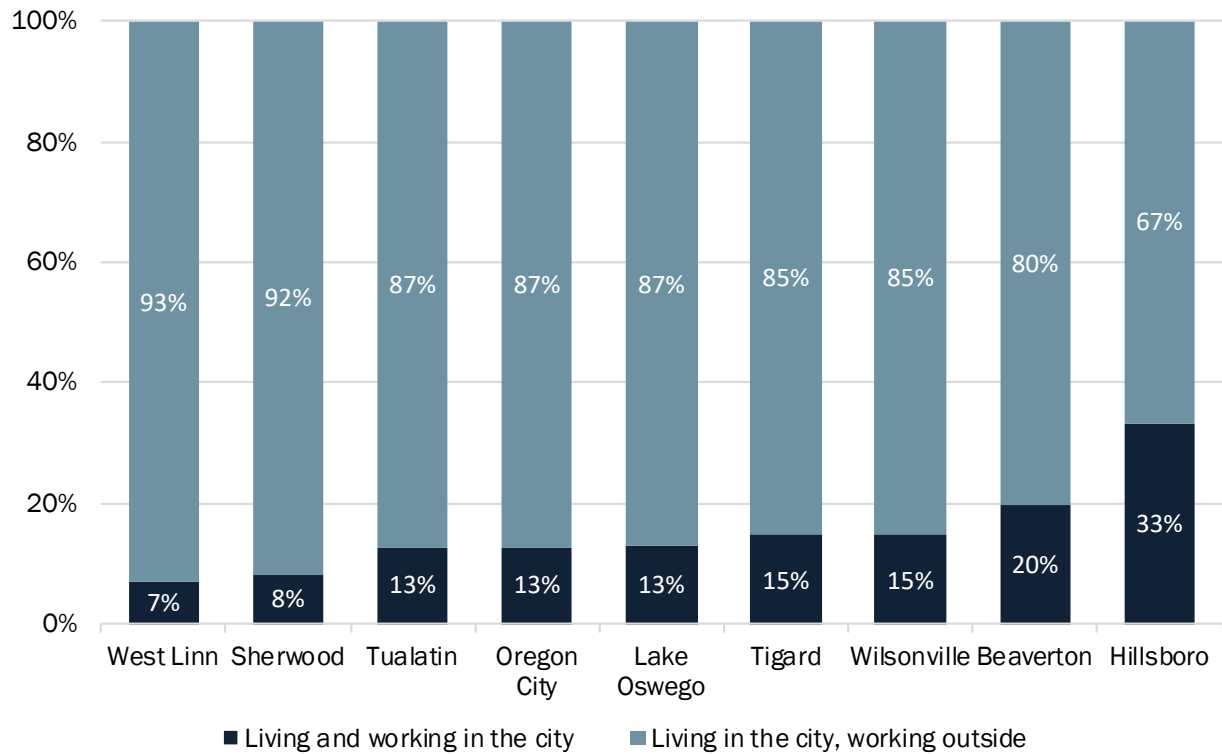
### Exhibit 59. Places Where Tualatin Residents were Employed, 2015

Source: U.S. Census Bureau, Census On the Map.



### Exhibit 60. Commuting Flows of Residents, Tualatin Relative to Comparison Geographies, 2015

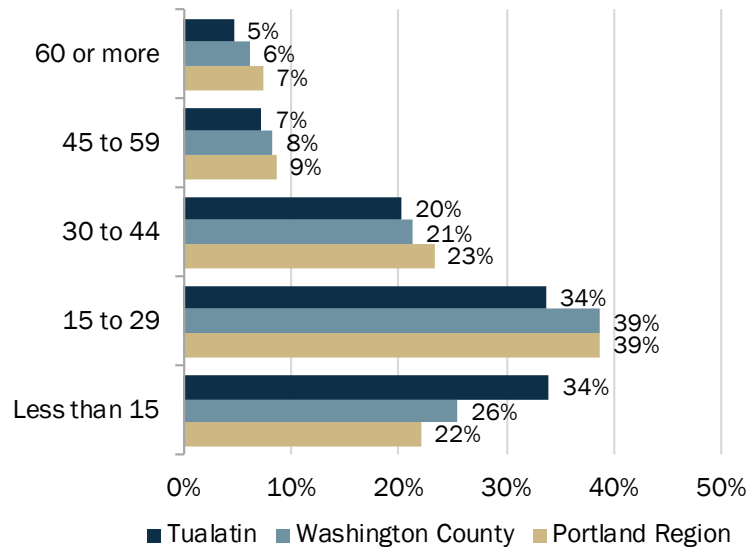
Source: U.S. Census Bureau, Census On the Map.



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.

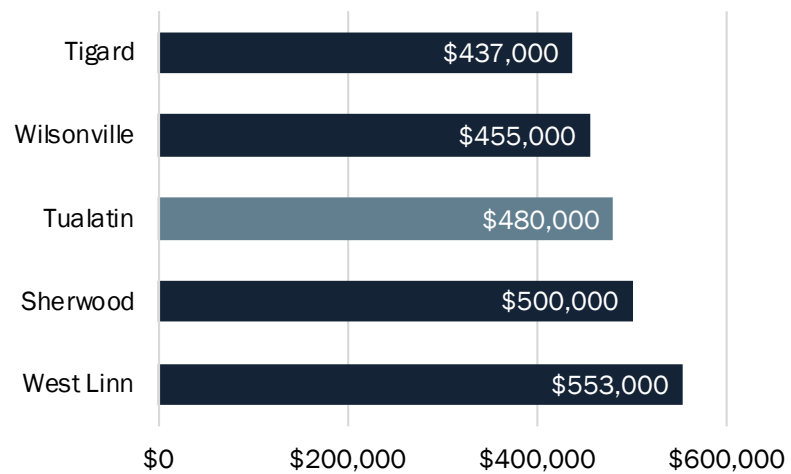
### Changes in Housing Costs

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**

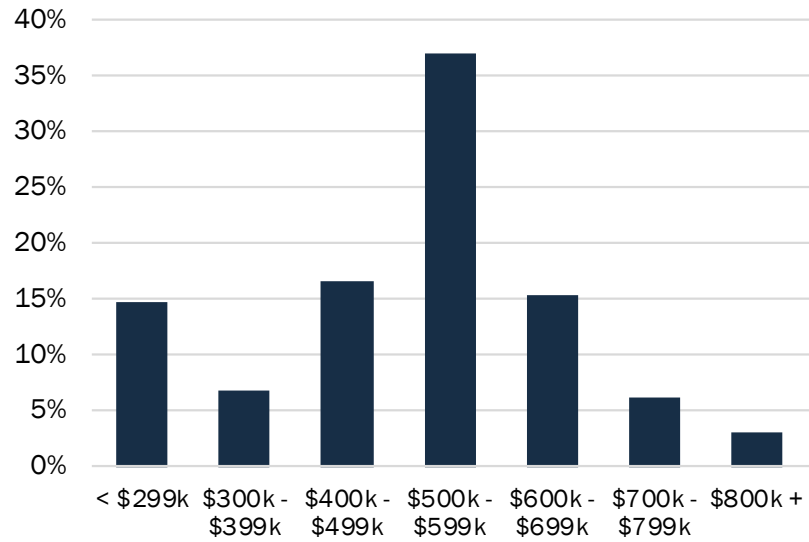
Source: Redfin.



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**

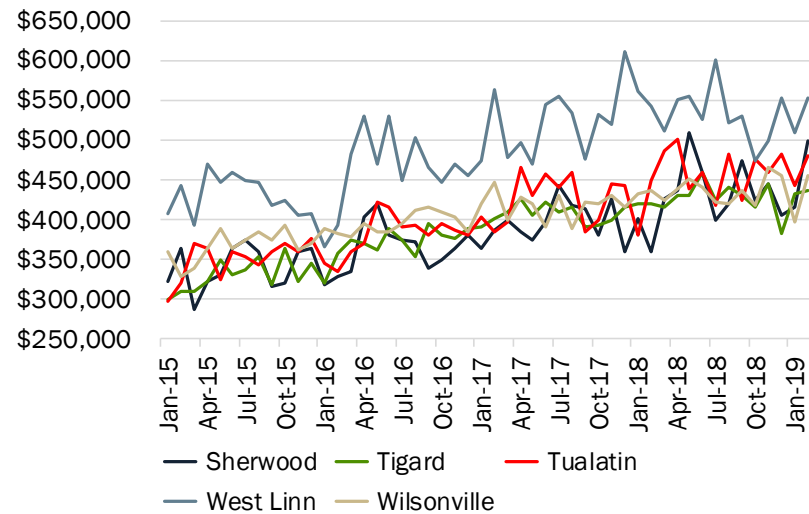
Source: RLIS.



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.





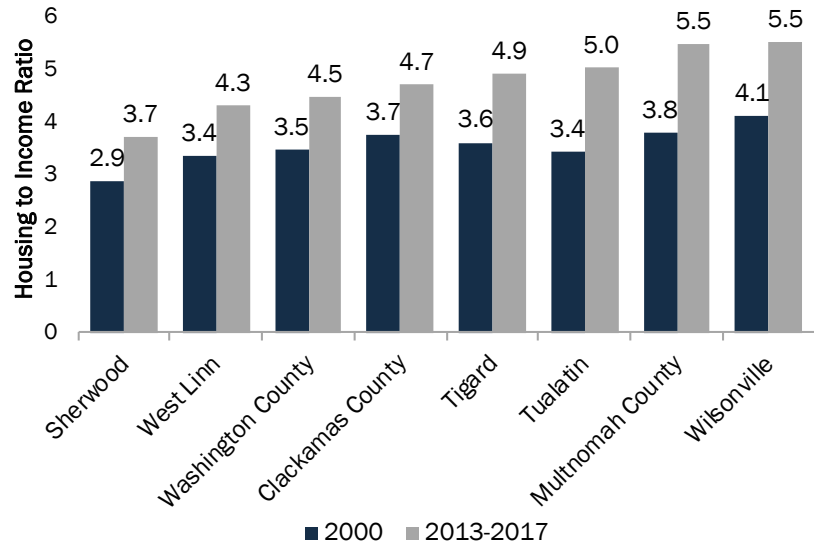
Since 2000, housing costs in Tualatin increased faster than incomes.

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 2013–2017<sup>39</sup>**

Source: U.S. Census Bureau, 2000 Decennial Census, Tables HCT012 and H085, and 2012–2016 ACS, Tables B19013 and B25077.



<sup>39</sup> 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

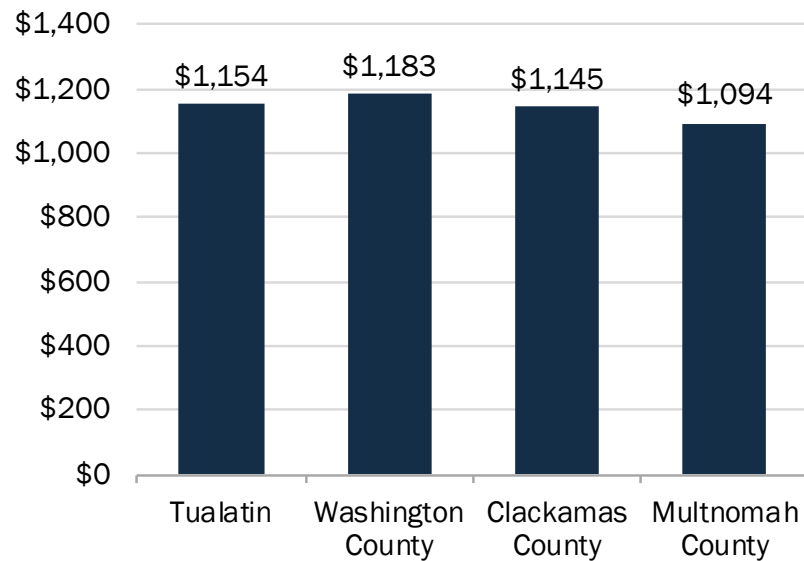
Median multifamily rents in Tualatin and Washington County are about \$1,200. The following charts show gross rent (which includes the cost of rent plus utilities) for Tualatin in comparison to Washington County and the Portland Region.

**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.

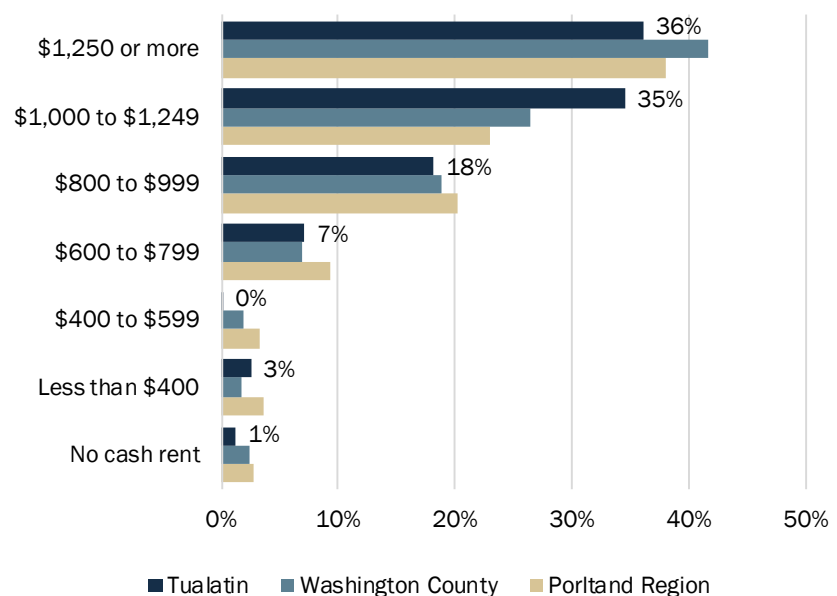


**Most renters in Tualatin paid more than \$1,000 per month in rent.**

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**

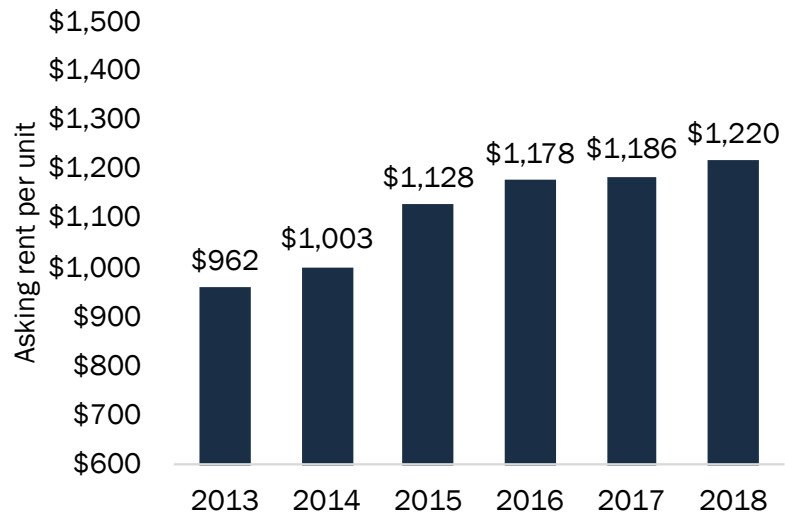
Source: U.S. Census Bureau, 2013-2017 ACS Table B25063.



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**

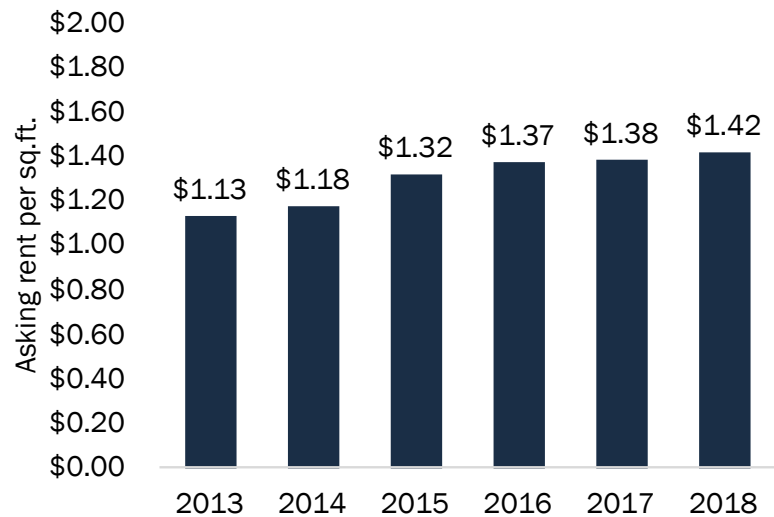
Source: CoStar.



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.

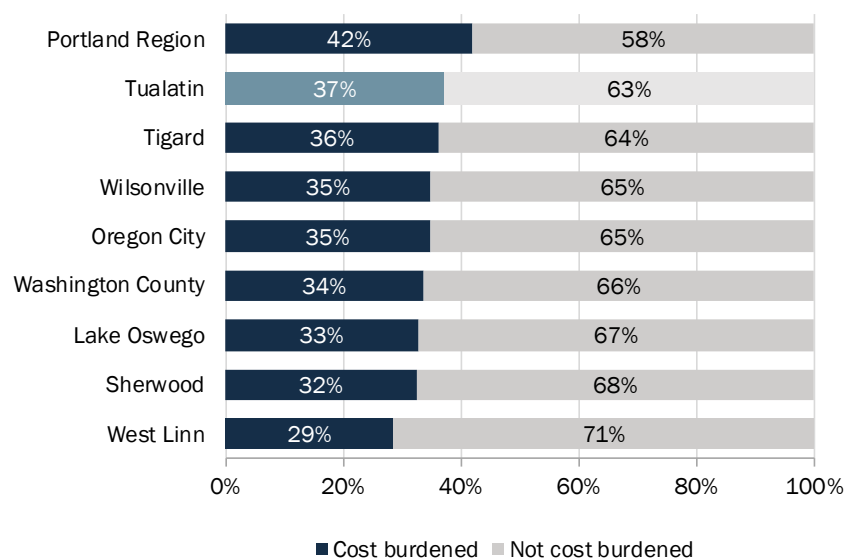
About 37% of Tualatin’s households (renters and homeowners) are cost burdened, of which 16% are severely cost burdened. About 56% of renter households (households who rent) are cost burdened, compared with 22% of homeowners (households who own their own home). Twenty-five percent of households in Tualatin are rent burdened households.<sup>40</sup> 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.

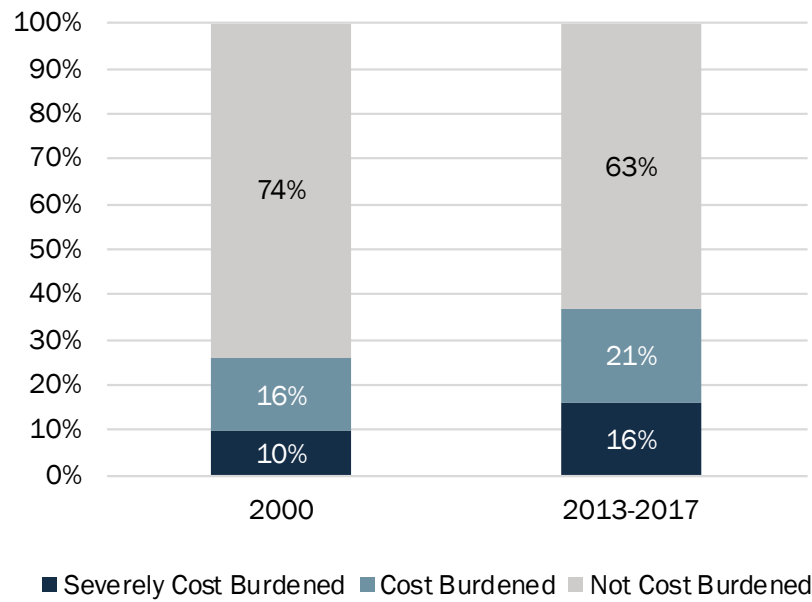


<sup>40</sup> Cities with populations >10,000 are required, per HB 4006, to assess “rent burden” if more than 50% of renters are cost burdened. In Tualatin as of the 2013-2017 period, 56% of total renter households were cost burdened. Upon further assessment, we find that a quarter (25%) of Tualatin’s 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.

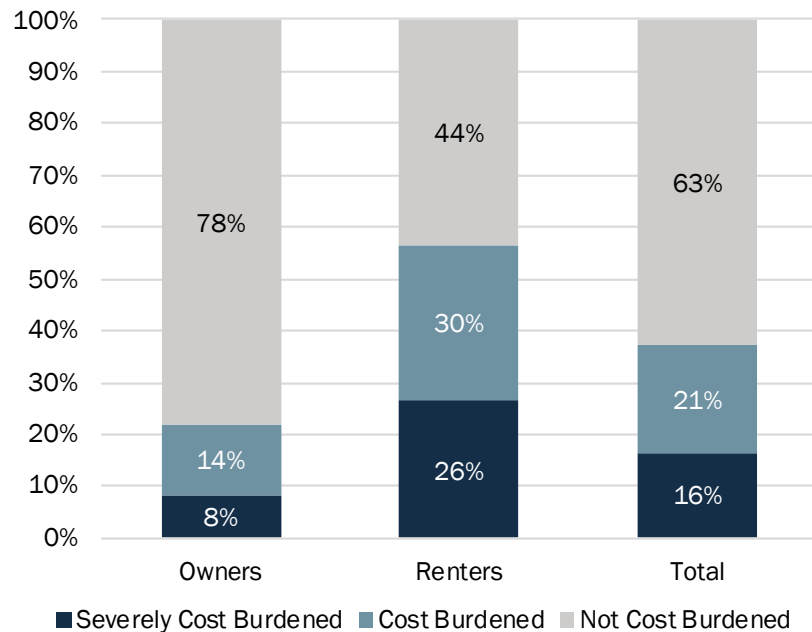


**Renters were more likely to be cost burdened than homeowners.**

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.

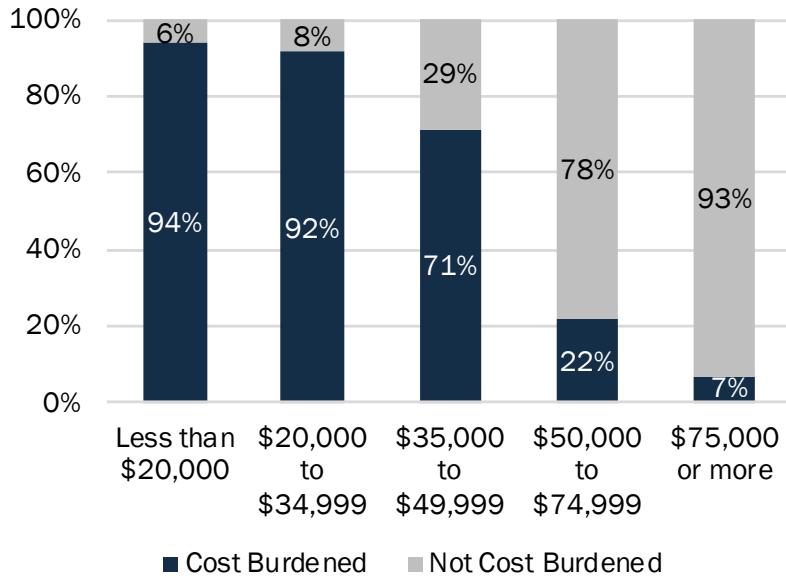


**Nearly all renter households earning less than \$35,000 per year were cost burdened.**

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**

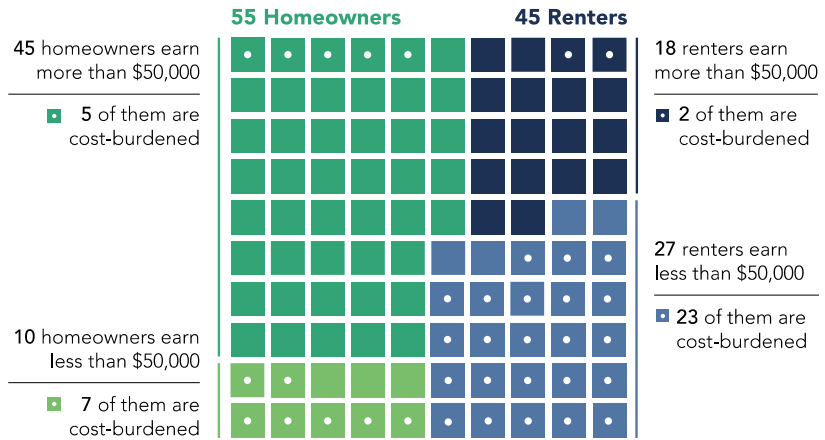
Source: U.S. Census Bureau, 2013-2017 ACS Table B25074.



**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 2035<sup>41</sup>**

Source: 2014 Metro Urban Growth Report, Appendix 12.

<b>2010</b>	<b>40%</b> \$2,541 per month Tualatin	<b>39%</b> \$2,300 per month Metro UGB
	<b>2035</b>	<b>34%</b> \$2,723 per month Tualatin

**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.

<b>2010</b>	<b>20%</b> 2,046 households Tualatin	<b>17%</b> 104,100 households Metro UGB
	<b>2035</b>	<b>15%</b> 1,838 households Tualatin

<sup>41</sup> 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.

<b>\$1,026</b>	<b>\$1,132</b>	<b>\$1,330</b>	<b>\$1,935</b>	<b>\$2,343</b>
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**

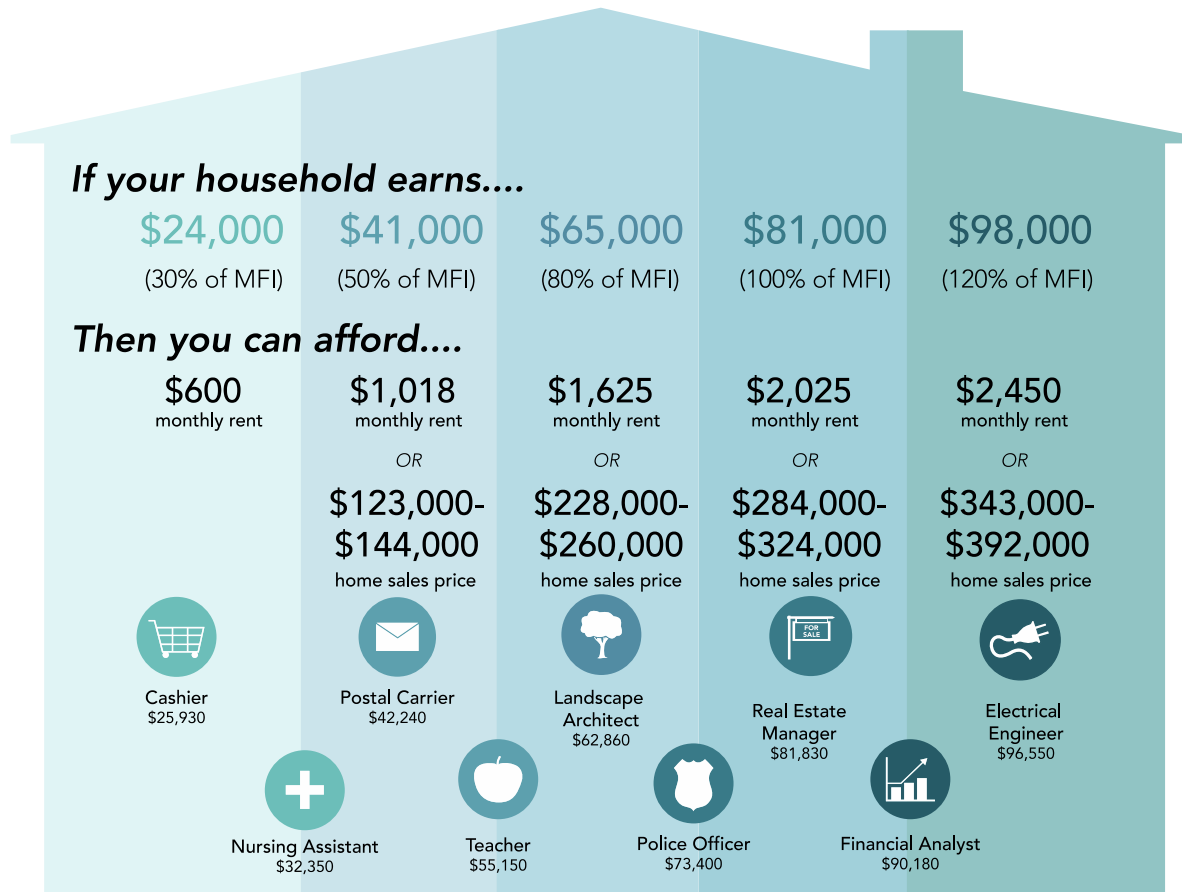
Affordable Housing Wage for two-bedroom Unit in Washington County

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.

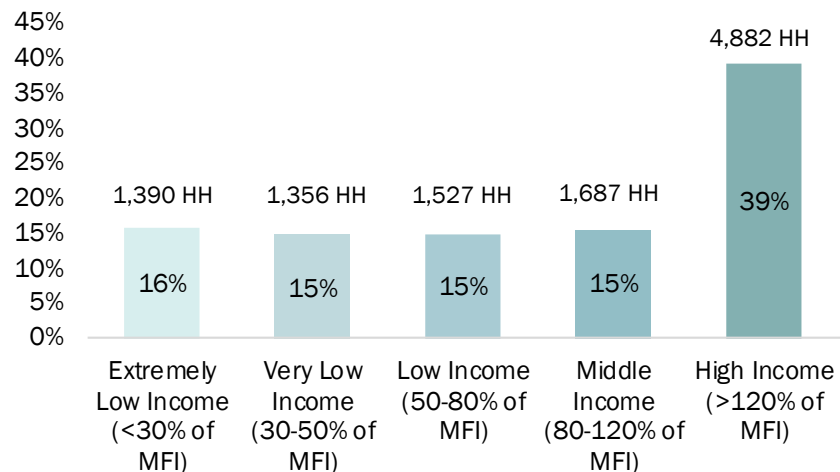
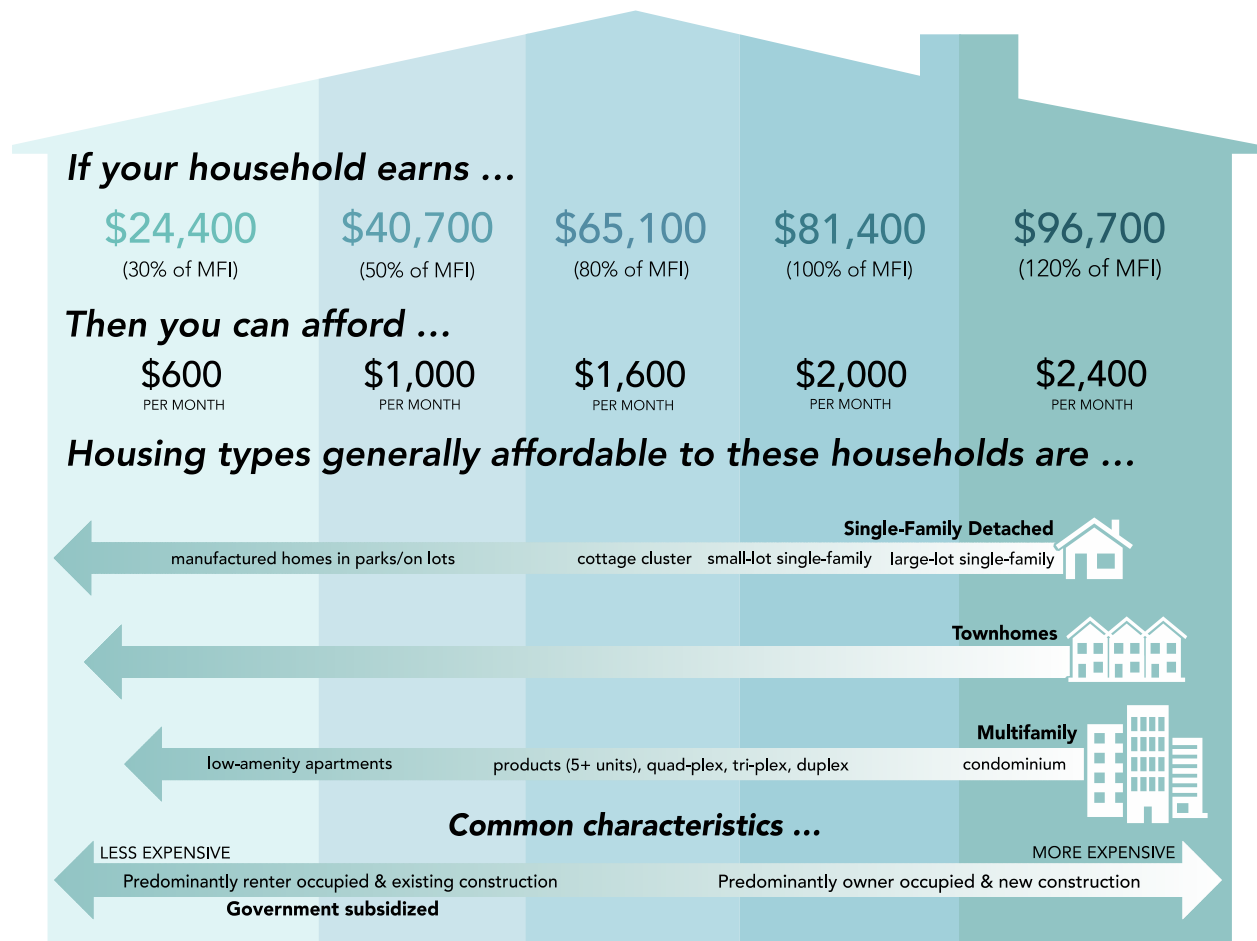


Exhibit 81 illustrates the types of financially attainable housing by income level in Washington County. Generally speaking, lower-income households will be renters occupying existing housing. Newly built housing will be a combination of renters (most likely in multifamily housing) and homeowners. The 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.

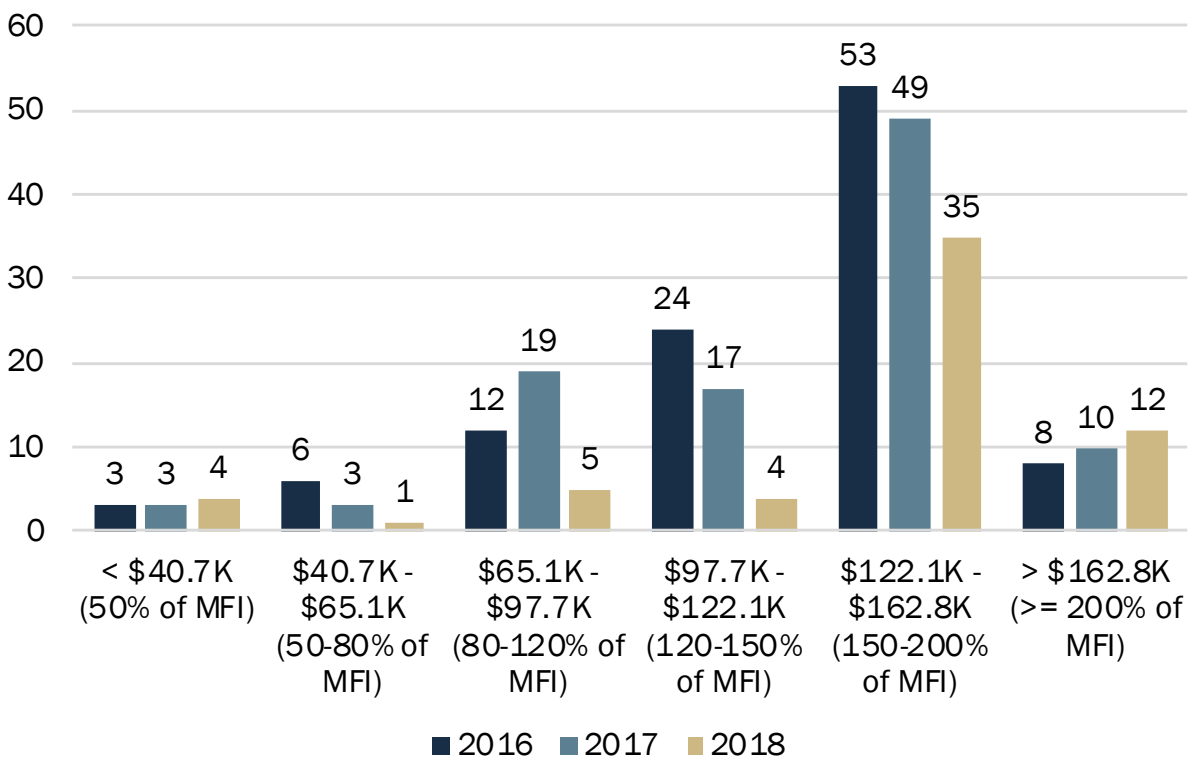
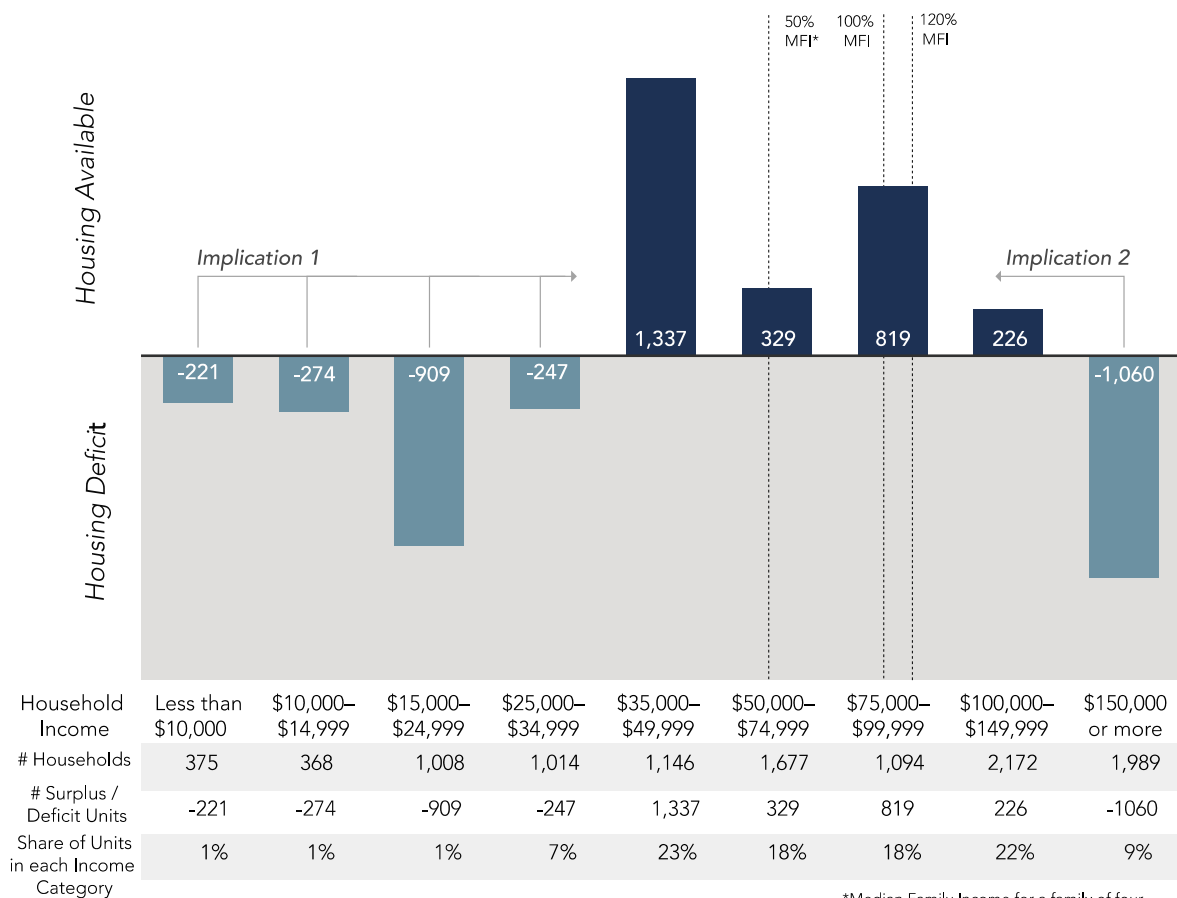


Exhibit 83 compares the number of households by income with the number of units affordable to those households in Tualatin. Tualatin currently has a deficit of housing affordable to households earning less than \$35,000. The types of housing that Tualatin has a deficit of are more affordable housing 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).<sup>42</sup> 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
<b>Tualatin</b>	<b>38,838</b>	<b>26,960</b>	<b>0.7</b>
<b>Washington County</b>	<b>595,860</b>	<b>337,127</b>	<b>1.6</b>
<b>Portland Region</b>	<b>1,811,860</b>	<b>1,259,773</b>	<b>1.4</b>

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.**

<sup>42</sup> 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."<sup>43</sup> Thus, simply looking at the long wave of demographic trends can provide good information for estimating future housing demand.

<sup>43</sup> 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.<sup>44</sup> 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

---

<sup>44</sup> 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.<sup>45</sup> The decline in homeownership among the Millennial generation has more to do with financial barriers rather than the preference to rent.<sup>46</sup>
- *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,

---

<sup>45</sup> Choi, Hyun June; Zhu, Jun; Goodman, Laurie; Ganesh, Bhargavi; Strohach, 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](https://www.urban.org/research/publication/millennial-homeownership/view/full_report)

<sup>46</sup> Ibid.

growth in this group will also drive demand for affordable housing, both for ownership and renting.<sup>47</sup>

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.

---

<sup>47</sup> 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 2020<sup>48</sup> to 12,008 households in 2040, an increase of 1,014 households.<sup>49</sup>

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
<b>Total New Dwelling Units (2020-2040)</b>	<b>571</b>	<b>443</b>	<b>1,014</b>
<b>Annual Average of New Dwelling Units</b>	<b>29</b>	<b>22</b>	<b>51</b>

<sup>48</sup> 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).

<sup>49</sup> 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.<sup>50</sup> 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.

---

<sup>50</sup> 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.<sup>51</sup>

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.

---

<sup>51</sup> 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
<b>Needed new dwelling units (2020-2040)</b>	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%
<b>equals Total new single-family detached DU</b>	507	456	355	406
Single-family attached				
Percent single-family attached DU	9%	10%	15%	15%
<b>equals Total new single-family attached DU</b>	91	102	152	152
Multifamily				
Percent multifamily	41%	45%	50%	45%
<b>Total new multifamily</b>	416	456	507	456
<b>equals Total new dwelling units (2020-2040)</b>	<b>1,014</b>	<b>1,014</b>	<b>1,014</b>	<b>1,014</b>

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 660-007<sup>52</sup>:
  - **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.

<sup>52</sup> 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)
<b>Needed new dwelling units (2020-2040)</b>	1,014
Dwelling units by structure type	
Single-family detached	
Percent single-family detached DU	40%
<b>equals Total new single-family detached DU</b>	406
Single-family attached	
Percent single-family attached DU	15%
<b>equals Total new single-family attached DU</b>	152
Multifamily	
Percent multifamily	45%
<b>Total new multifamily</b>	456
<b>equals Total new dwelling units (2020-2040)</b>	<b>1,014</b>

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 acres<sup>53</sup> to account for land needed for rights-of-way by Plan Designation in Tualatin, based on Metro’s methodology of existing rights-of-way.<sup>54</sup>

- **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

<sup>53</sup> 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.

<sup>54</sup> 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

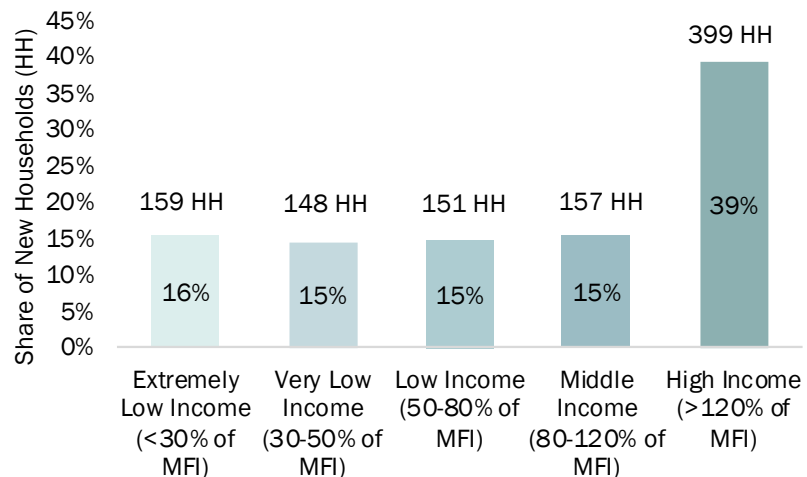
The next step in the housing needs analysis is to develop an estimate of need for housing by income and housing type. This analysis requires an estimate of the income distribution of current and future households in the community. Estimates presented in this section are based on (1) secondary data from 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,<sup>55</sup> 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.

---

<sup>55</sup> 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,<sup>56</sup> 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

---

<sup>56</sup> 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,”<sup>57</sup> can be used to evaluate different ways that vacant residential land may build out by applying different assumptions.

---

<sup>57</sup> 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	-
<b>Total</b>	<b>18</b>	<b>-</b>	<b>111</b>	<b>18</b>	<b>-</b>	<b>99</b>	<b>58</b>	<b>-</b>	<b>422</b>	<b>94</b>	<b>632</b>

### 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
<b>Total</b>	<b>575</b>	<b>88</b>	<b>6.5</b>

**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	-	-	-
<b>Total</b>	<b>632</b>	<b>575</b>	<b>1,207</b>

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
<b>Total</b>	<b>1,339</b>	<b>575</b>	<b>764</b>



## 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).<sup>58</sup> 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.

<sup>58</sup> 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.<sup>59</sup> 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

---

<sup>59</sup> We note that Newberg is not required to comply with ORS 197.296.

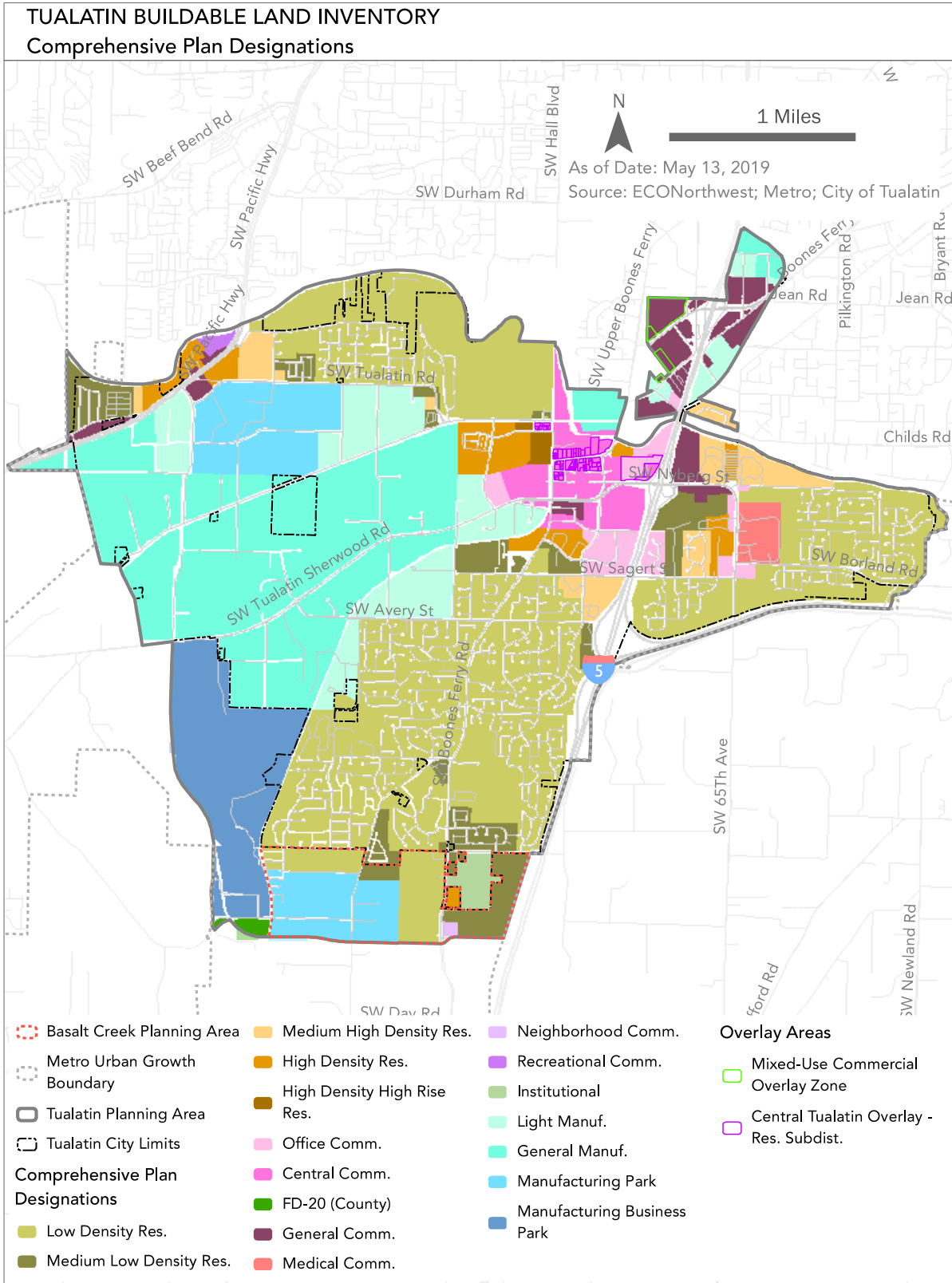
3. Identify constraints
4. Verify inventory results
5. Tabulate and map results

### 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 <b>or</b> 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

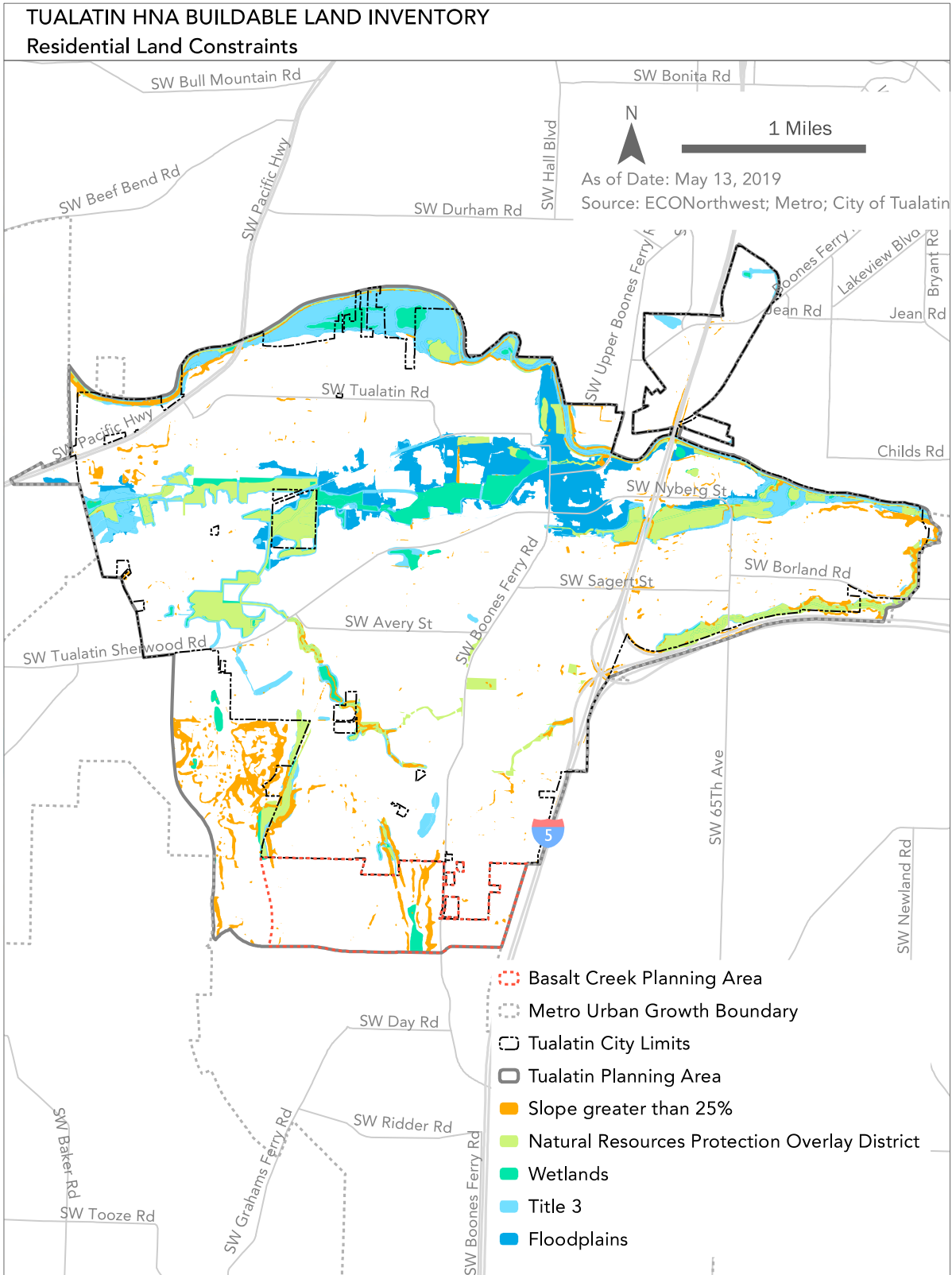
Consistent with OAR 660-008-0005(2) guidance on residential buildable lands inventories, ECO deducted certain lands with development constraints from vacant lands. We used some of the constraints established in Metro’s methodology, with modifications to fit local considerations in Tualatin. These constraints are summarized in the table below.

Constraint	Statutory Authority	Threshold
<b>Goal 5 Natural Resource Constraints</b>		
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		
<b>Natural Hazard Constraints</b>		
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.

**From:** [DANIELSON Marah B](#)  
**To:** [Tabitha Boschetti](#)  
**Cc:** [TAYAR Abraham \\* Avi](#); [Tony Doran](#); [Steve Koper](#); [Kim McMillan](#)  
**Subject:** RE: Basalt-Norwood Annexation and text amendment  
**Date:** Tuesday, July 21, 2020 4:50:19 PM

---

Thanks for explaining that the text amendment would not change the maximum residential density so traffic impacts would be similar to what is currently allowed under the existing zoning. Based on this information, I was not planning to send ODOT comments. Please let me know if you would like formal ODOT comments for the record on this case.

Marah

---

**From:** Tabitha Boschetti <[tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)>  
**Sent:** Tuesday, July 21, 2020 2:43 PM  
**To:** DANIELSON Marah B <[Marah.B.DANIELSON@odot.state.or.us](mailto:Marah.B.DANIELSON@odot.state.or.us)>  
**Cc:** TAYAR Abraham \* Avi <[Abraham.TAYAR@odot.state.or.us](mailto:Abraham.TAYAR@odot.state.or.us)>; Tony Doran <[TDORAN@tualatin.gov](mailto:TDORAN@tualatin.gov)>; Steve Koper <[skoper@tualatin.gov](mailto:skoper@tualatin.gov)>; Kim McMillan <[kmcmillan@tualatin.gov](mailto:kmcmillan@tualatin.gov)>  
**Subject:** RE: Basalt-Norwood Annexation and text amendment

Marah,

Thank you for writing. There has not been any kind of trip analysis on either land use case; I am interested in hearing more from ODOT's perspective.

The assumption with the Plan Text Amendment (PTA 20-0003) has been that since the applicant is not proposing a change to the maximum residential density, transportation impacts of future development would be similar to what is allowed by the zone now. The subject zone as currently written allows attached and multi-family housing at 10 units per acre, with single-family subdivision development allowed only through Conditional Use Permit. The applicant is asking for this zone to newly allow detached single-family development as a permitted use at the same density of 10 units per acre, along with some different lot sizes. Transportation impacts would be evaluated at the time of a future Subdivision application.

Likewise, with the proposed annexation of the parcel west of I-5 at SW Norwood Road (ANN 20-0003), we would be anticipating evaluation of the specific transportation impacts at the time of development. Tualatin's annexation process applies the land use designation previously established through concept planning. Please let me know if you have more concerns with that.

Thank you,

**Tabitha Boschetti, AICP**  
503.691.3029 | [tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)

---

**From:** Tony Doran <[TDORAN@tualatin.gov](mailto:TDORAN@tualatin.gov)>

**Sent:** Tuesday, July 21, 2020 2:12 PM

**To:** DANIELSON Marah B <[Marah.B.DANIELSON@odot.state.or.us](mailto:Marah.B.DANIELSON@odot.state.or.us)>; Tabitha Boschetti <[tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)>

**Cc:** TAYAR Abraham \* Avi <[Abraham.TAYAR@odot.state.or.us](mailto:Abraham.TAYAR@odot.state.or.us)>

**Subject:** RE: Basalt-Norwood Annexation and text amendment

Tabitha,

Would you help Marah?

Tony Doran

Engineering Associate

(503) 691-3035 | [tdoran@tualatin.gov](mailto:tdoran@tualatin.gov)

Engineering Division | Public Works

City of Tualatin

18880 SW Martinazzi Avenue

Tualatin, OR 97062

---

**From:** DANIELSON Marah B <[Marah.B.DANIELSON@odot.state.or.us](mailto:Marah.B.DANIELSON@odot.state.or.us)>

**Sent:** Tuesday, July 21, 2020 10:46 AM

**To:** Tony Doran <[TDORAN@tualatin.gov](mailto:TDORAN@tualatin.gov)>

**Cc:** TAYAR Abraham \* Avi <[Abraham.TAYAR@odot.state.or.us](mailto:Abraham.TAYAR@odot.state.or.us)>

**Subject:** Basalt-Norwood Annexation and text amendment

Hi Tony,

We received the Tualatin Land Use Notice for the Basalt-Norwood Annexation and Text Amendment. The text amendment to allow medium-low density residential uses outright in the single family detached housing zone could impact I-5. Has a trip generation/trip distribution analysis been done to analyze whether there will be impacts to the transportation system?

Thanks,

Marah

**From:** [kate.w.hawkins@odot.state.or.us](mailto:kate.w.hawkins@odot.state.or.us) <[kate.w.hawkins@odot.state.or.us](mailto:kate.w.hawkins@odot.state.or.us)>

**Sent:** Monday, July 20, 2020 2:40 PM

**To:** DANIELSON Marah B <[Marah.B.DANIELSON@odot.state.or.us](mailto:Marah.B.DANIELSON@odot.state.or.us)>; TAYAR Abraham \* Avi

<[Abraham.TAYAR@odot.state.or.us](mailto:Abraham.TAYAR@odot.state.or.us)>; RODRIGUEZ Myriam \* Marcela

<[Marcela.RODRIGUEZ@odot.state.or.us](mailto:Marcela.RODRIGUEZ@odot.state.or.us)>; RUSSELL John <[John.RUSSELL@odot.state.or.us](mailto:John.RUSSELL@odot.state.or.us)>

**Subject:** ODOT Case # 10540 Basalt-Norwood Annexation

I've uploaded application materials for the proposed annexation and text amendment at Norwood Road in the City of Tualatin. The proposal includes annexation of 23.93 acres and a quasi-judicial amendment to allow single-family detached housing to be developed under Medium-Low Density Residential (RML) zoning within the Basalt Creek Planning Area.

Comments are due to the City of Tualatin by July 27th.



**Lynette Sanford**

---

**From:** Daniel Bachhuber <daniel@bachhuber.co>  
**Sent:** Sunday, July 19, 2020 2:43 PM  
**To:** Mark and Janelle Thompson  
**Cc:** Mona St. Clair; william.beers@daimler.com; Steve Koper; Lynette Sanford; Alan Aplin; nippstik@hotmail.com; Tabitha Boschetti; Ursula Kuhn  
**Subject:** Re: Application For PTA

Hey folks,

I had originally sent my statement to Bill, Steve, and Lynette too. For the sake of posterity, here it is:

“This is an important and difficult decision because the PTA’s affected area represents a substantial portion of Basalt Creek’s, and Tualatin’s, buildable land. I voted against the PTA because it seems like it would produce more substantially single-family detached, which is inconsistent with our community’s housing goals. It would be a planning failure if the vast majority of Basalt Creek ended up as single-family detached a decade from now.“

Hope everyone is enjoying the sun!

Daniel

On Fri, Jul 17, 2020 at 8:16 PM Mark and Janelle Thompson <[markthomps@msn.com](mailto:markthomps@msn.com)> wrote:

Sorry, realized I sent the wrong write up I had prepared for the PTA statement. Here is my actual write up. Thanks

I voted in favor of denying the plan text amendment because I believe the developer was not able to prove why these changes best serve the community or city. While I might be able to be moved to agree with the smaller lot residential housing changes, I don't believe I have enough information as to the plans of what the developer is intending to do or what it will look like in the neighborhood with the set back and lot size modifications. More information and design intents would be helpful to envision what this would create for this area. It appears they want to create a homogeneous neighborhood set at a tighter configuration then the city has seen before, with no variation between building types or spacing. I believe more of a mixture of housing types might be better for the community, give greater housing options, more closely fit the neighborhood to the north, and give a more appealing configuration.

Janelle

---

**From:** Mona St. Clair <[stclairmona@gmail.com](mailto:stclairmona@gmail.com)>  
**Sent:** Friday, July 17, 2020 4:24 PM  
**To:** [william.beers@daimler.com](mailto:william.beers@daimler.com) <[william.beers@daimler.com](mailto:william.beers@daimler.com)>; Steve Koper <[skoper@tualatin.gov](mailto:skoper@tualatin.gov)>; Lynette Sanford <[LSanford@tualatin.gov](mailto:LSanford@tualatin.gov)>; Alan Aplin <[aaplin@kerrcontractors.com](mailto:aaplin@kerrcontractors.com)>; Janelle Thompson <[markthomps@msn.com](mailto:markthomps@msn.com)>; Daniel Bachhuber <[daniel@bachhuber.co](mailto:daniel@bachhuber.co)>; [nippstik@hotmail.com](mailto:nippstik@hotmail.com) <[nippstik@hotmail.com](mailto:nippstik@hotmail.com)>; Tabitha Boschetti <[tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)>; Ursula Kuhn <[ursulaakuhn@gmail.com](mailto:ursulaakuhn@gmail.com)>  
**Subject:** Application For PTA

## Lynette Sanford

---

**From:** Mark and Janelle Thompson <markthomps@msn.com>  
**Sent:** Friday, July 17, 2020 8:16 PM  
**To:** Mona St. Clair; william.beers@daimler.com; Steve Koper; Lynette Sanford; Alan Aplin; Daniel Bachhuber; nippstik@hotmail.com; Tabitha Boschetti; Ursula Kuhn  
**Subject:** Re: Application For PTA

Sorry, realized I sent the wrong write up I had prepared for the PTA statement. Here is my actual write up. Thanks

I voted in favor of denying the plan text amendment because I believe the developer was not able to prove why these changes best serve the community or city. While I might be able to be moved to agree with the smaller lot residential housing changes, I don't believe I have enough information as to the plans of what the developer is intending to do or what it will look like in the neighborhood with the set back and lot size modifications. More information and design intents would be helpful to envision what this would create for this area. It appears they want to create a homogeneous neighborhood set at a tighter configuration then the city has seen before, with no variation between building types or spacing. I believe more of a mixture of housing types might be better for the community, give greater housing options, more closely fit the neighborhood to the north, and give a more appealing configuration.

Janelle

---

**From:** Mona St. Clair <stclairmona@gmail.com>  
**Sent:** Friday, July 17, 2020 4:24 PM  
**To:** william.beers@daimler.com <william.beers@daimler.com>; Steve Koper <skoper@tualatin.gov>; Lynette Sanford <LSanford@tualatin.gov>; Alan Aplin <aaplin@kerrcontractors.com>; Janelle Thompson <markthomps@msn.com>; Daniel Bachhuber <daniel@bachhuber.co>; nippstik@hotmail.com <nippstik@hotmail.com>; Tabitha Boschetti <tboschetti@tualatin.gov>; Ursula Kuhn <ursulaakuhn@gmail.com>  
**Subject:** Application For PTA

Hello,

I voted to approve the Application for PTA last night because it appears that adding single-family detached housing on small lots to the RML zone complies with the zone's density requirements. As long as the change is limited to the proposed location, which is not ideal for apartments, I am comfortable with this proposal.

Warm Regards,

*Mona*

**Mona St. Clair, Oregon Licensed Broker**

The St. Clair Group At eXp Realty, LLC  
503-819-9596  
[www.MonaSells.com](http://www.MonaSells.com)



## Lynette Sanford

---

**From:** william.beers@daimler.com  
**Sent:** Friday, July 17, 2020 11:47 AM  
**To:** Steve Koper; Lynette Sanford  
**Cc:** stclairmona@gmail.com; aaplin@kerrcontractors.com; markthomps@msn.com; daniel@bachhuber.co; nippstik@hotmail.com; Tabitha Boschetti; ursulaakuhn@gmail.com  
**Subject:** Comments on PTA 20-0003

Fellow commissioners,

Thank you for your prompt replies, I appreciate it. I'll draft up a summary of each side to present to Council to go along with your verbatim comments in their packet.

Steve and Lynette,

Please attach my comments below to Council's packet for PTA 20-0003.

I voted to deny PTA 20-0003 for the following reasons:

- Stakeholder feedback from the City of Tualatin 2040 Policy Priorities document (12/2019) identifies greater diversity of housing types as a high priority. Ceding a large swath of land to single-family homes doesn't feel in alignment with Tualatin's community plan.
- Single-family homes are still permitted in RML via the CUP process, which I think will allow the applicants to reach maximum density with a mix of multi-family and single-family homes.
- Our (TPC) discussion with both the applicants' representative and city staff indicated that our RML code is dated, and should be evaluated and likely revised. I think this should be a city led initiative with feedback from key stakeholders, including the PTA 20-0003 applicants. Stakeholder feedback from the Tualatin 2040 document above also expressed a desire to reduce lot sized specifically in the Basalt Creek area.

Sincerely,

Bill Beers

If you are not the addressee, please inform us immediately that you have received this e-mail by mistake, and delete it. We thank you for your support.

## Lynette Sanford

---

**From:** william.beers@daimler.com  
**Sent:** Friday, July 17, 2020 11:04 AM  
**To:** Steve Koper; Lynette Sanford  
**Subject:** FW: TPC question

Hello Steve and Lynette,

Please find Mitch's comments below.

Sincerely,

Bill Beers  
Daimler Trucks North America  
Digital Mockup  
C2E-EVE  
4747 North Channel Ave.  
Portland, OR 97217  
503 745 6274

---

**From:** mitch.greene@gmail.com <mitch.greene@gmail.com>  
**Sent:** Thursday, July 16, 2020 8:25 PM  
**To:** Beers, William (164) <william.beers@daimler.com>  
**Subject:** TPC question

Bill,

I voted no tonight because I think we should recommend the plan text amendment to City Council. I do not think having an extra hurdle for developers - the need for conditional use permits - to build detached single-family homes is productive for the developers or the community.

I am already concerned about the traffic impact that the developments will have on Lower Boones Ferry. I hope that single -family homes as opposed to multi-units will have less of an impact for those that live near LBF and need it to access Tualatin or I-5.

Please let me know if you have any questions.

Regards,

Mitch Greene

If you are not the addressee, please inform us immediately that you have received this e-mail by mistake, and delete it. We thank you for your support.

## Lynette Sanford

---

**From:** Mona St. Clair <stclairmona@gmail.com>  
**Sent:** Friday, July 17, 2020 9:24 AM  
**To:** william.beers@daimler.com; Steve Koper; Lynette Sanford; Alan Aplin; Janelle Thompson; Daniel Bachhuber; nippstik@hotmail.com; Tabitha Boschetti; Ursula Kuhn  
**Subject:** Application For PTA

Hello,

I voted to approve the Application for PTA last night because it appears that adding single-family detached housing on small lots to the RML zone complies with the zone's density requirements. As long as the change is limited to the proposed location, which is not ideal for apartments, I am comfortable with this proposal.

**Warm Regards,**

*Mona*

**Mona St. Clair, Oregon Licensed Broker**

The St. Clair Group At eXp Realty, LLC  
503-819-9596  
[www.MonaSells.com](http://www.MonaSells.com)

**From:** [Alan Aplin](#)  
**To:** [Steve Koper](#); [Janelle Thompson](#); [Daniel Bachhuber](#); [william.beers@daimler.com](mailto:william.beers@daimler.com); [Mona St. Clair](#); [nippstik@hotmail.com](mailto:nippstik@hotmail.com); [Tabitha Boschetti](#)  
**Subject:** PTA Comments from 7/16/2020 Meeting  
**Date:** Friday, July 17, 2020 6:05:59 AM  
**Attachments:** [image001.png](#)

---

The Basalt Creek area was formed between Tualatin and Wilsonville. The Tualatin City council determined the zoning for this area. The PTA submitted by the applicants meets the zoning requirements for density. The location of the property is unique within the City and any revisions by this PTA affect only this unique area. The market determines what preferred housing units are built. This property is location constrained, without any real amenities in terms of commercial areas, parks, etc. Thus making the option for construction of small subdivisions a permitted option, without the added burden of requesting conditional use approval, is acceptable to me.

Alan W. Aplin  
Kerr Contractors  
P.O. Box 1060  
Woodburn, OR 97071  
[aaplin@kerrcontractors.com](mailto:aaplin@kerrcontractors.com)  
[971.216.0050](tel:971.216.0050) O  
[503.981.1161](tel:503.981.1161) F  
[971.235.5002](tel:971.235.5002) C



**From:** [Ursula Kuhn](#)  
**To:** [Steve Koper](#); [Janelle Thompson](#); [Daniel Bachhuber](#); [william.beers@daimler.com](mailto:william.beers@daimler.com); [Mona St. Clair](#); [Alan Aplin](#); [nippstik@hotmail.com](mailto:nippstik@hotmail.com); [Tabitha Boschetti](#)  
**Subject:** PTA Revision-denied  
**Date:** Thursday, July 16, 2020 11:10:39 PM

---

To submit to Chair Beers to add to his presentation to the City Council:

Although my vote for the current PTA as written was a denial.

It could be changed to an approval if the following concerns are addressed:

The parcel in question being 60% of current RML zone would not work toward HNP 2040 without revisions.

Green space per acre is not addressed

Traffic, parking, and street maintenance is not addressed

Community uses and walkability is not addressed

Current infrastructure and future upgrades are not addressed including, sewer, water, power

Access to amenities is lacking

I am open to more affordable housing as part of the HNP and the zoning as it was decided when annexed into the city, however with a limited acreage that can be used to add housing and this being a majority of it, concerns need to be addressed prior to a PTA

Thanks

Ursula Kuhn

DATE: December 4, 2019  
TO: Tualatin Housing Needs Analysis Project Advisory Committees  
CC: Karen Perl Fox, Steve Koper, and Jonathan Taylor  
FROM: Beth Goodman and Sadie DiNatale, ECONorthwest  
SUBJECT: FINAL: TUALATIN HOUSING STRATEGY

---

The City of Tualatin contracted ECONorthwest to develop a Housing Needs Analysis and a Housing Strategy for Tualatin. The Housing Needs Analysis (HNA) will determine whether the City of Tualatin has enough land to accommodate twenty years of population and housing growth. It will characterize housing affordability problems and identify gaps in housing affordability in Tualatin. The HNA will provide the basis for an update to the City's Comprehensive Plan Housing Element, as well as for the development of an action plan to implement the housing policies (i.e., the Housing Strategy).

The HNA uses a planning period of 2020–2040. Tualatin is planning for minimum growth of 1,014 new dwelling units within the Tualatin city limits and the Basalt Creek area over the 2020–2040 planning period. Tualatin's vacant unconstrained buildable land has capacity for development of 1,207 new dwelling units at full build-out, not including redevelopment capacity. Build-out of Tualatin's vacant land could occur within the 2020–2040 period, or it could take longer. While the HNA works with the forecasted growth of 1,014 new dwelling units through 2040, the City may consider potential residential growth beyond this forecast in its housing policies, including build-out of all vacant land and redevelopment resulting in additional housing

The results of the HNA show that Tualatin has a deficit of land designated for housing in the Medium High Density Residential and the High Density / High-Rise Residential comprehensive plan designations. The City will need to develop policies to meet this deficit, such as redevelopment or rezoning land to meet these housing needs.

A key objective of the HNA and accompanying 2020 Housing Strategy is to identify options for changes to the City's Comprehensive Plan and land use regulations needed to address housing and residential land needs. This memorandum presents a housing strategy for Tualatin, based on the results of the HNA and discussions with the Community Advisory Committee (CAC) and Technical Advisory Committee (TAC). This Housing Strategy presents a comprehensive package of interrelated policy changes that the CAC recommends the City address.

This Housing Strategy recognizes that the City does not build housing. The strategy focuses on land use tools to ensure there is adequate land planned and zoned to meet the range of housing needs and opportunities for a variety of housing types, whether they be priced at market rate or subsidized. To the extent possible, this strategy strives to provide opportunities for lower-cost market-rate housing to achieve more housing affordability without complete reliance on subsidies and to include subsidized housing as an important tool to meet the need at the lower end of the income spectrum (low, very low, and extremely low) in the mix of strategies.

The Housing Strategy addresses the needs of households with middle, low, very low, or extremely low income. The following describes these households, based on information from the Tualatin Housing Needs Analysis.

- **Very low-income and extremely low-income households** are those who have an income of 50% or less of Washington County’s median family income (MFI)<sup>1</sup> which is an annual household income of about \$41,000 or less for a family of four. About 31% of Tualatin’s households fit into this category. They can afford a monthly housing cost of \$1,018 or less.<sup>2</sup> Development of housing affordable to households at this income level is generally accomplished through development of income-restricted housing.
- **Low-income households** are those who have an income between 50% and 80% of Washington County’s MFI, or an income between \$41,000 and \$65,000 for a family of four. About 15% of Tualatin’s households fit into this category. They can afford a monthly housing cost of \$1,018 to \$1,625. Households with an income below 60% of MFI typically qualify for some types of income-restricted housing. The private housing market often struggles to develop housing affordable to households in this group, especially for the lower-income households in the group.
- **Middle-income households** are those who have an income between 80% and 120% of Washington County’s MFI, or an income between \$65,000 and \$98,000 for a family of four. About 15% of Tualatin’s households fit into this category. They can afford a monthly housing cost of \$1,625 to \$2,400. The private housing market may develop housing affordable to households in this group.

Through the technical analysis of the HNA and input from the CAC and TAC, the City identified six strategic priorities to meet housing needs identified in the HNA. Strategic priorities are described in greater detail in the section below. Appendix A presents the full text of Tualatin’s existing Comprehensive Plan policies for housing. Appendix B presents the information provided to the CAC in the memorandum “Housing Policy Tools to Address Needs” (May 16, 2019).

## Tualatin’s Housing Strategy

The Tualatin Housing Strategy is organized around six broad strategic priorities: (1) ensure an adequate supply of land that is available and serviceable; (2) encourage development of a wider variety of housing types; (3) identify strategies to support affordable housing; (4) evaluate funding tools to support residential development; (5) identify redevelopment opportunities; and (6) ensure there are connections between planning for housing and other planning (such as transportation planning, water and wastewater planning, or economic development planning). The broad goal of the Tualatin Housing Strategy is to help the City manage the land within the

---

<sup>1</sup> Median family income is determined by the U.S. Department of Housing and Urban Development. In 2018, Washington County’s MFI was \$81,400.

<sup>2</sup> This assumes that households pay less than 30% of their gross income on housing costs, including rent or mortgage, utilities, home insurance, and property taxes.

Tualatin planning area to meet current and future housing needs while maintaining the character and quality of life in Tualatin and protecting public interests such as housing affordability, health, safety, and municipal revenues.

The Tualatin CAC convened seven times between March 2019 and September 2019. The CAC discussed housing at the meetings in March, May, August, and September. The Tualatin TAC met four times between April 2019 and September 2019 and discussed housing at all four meetings (while some meetings included discussions of other topics, as well). The CAC and TAC provided input into the development of the Housing Strategy through discussions at meetings and opportunities for input on written documents.

The recommendations from the CAC in this strategy consider key findings from the HNA, such as the following examples. The City has a long-term deficit of residential land. The housing market is not building enough housing that is affordable to households with annual incomes less than \$35,000 based on U.S. Census American Community Survey data. The housing market in Tualatin also has a deficit of housing affordable to households earning more than \$150,000.<sup>3</sup> The composition of Tualatin's population is becoming older and more diverse. This document presents a comprehensive strategy that provides a variety of opportunities to meet the housing needs of Tualatin's residents at all income levels.

Many of the actions described in the Tualatin Housing Strategy will require legislative amendments to the City's Comprehensive Plan and/or Development Code. These actions will be subject to standard notification and hearing procedures. After the Housing Needs Analysis is completed, the Planning Commission and City Council will prioritize the actions suggested in this memorandum, along with other actions suggested for Tualatin through 2040. Implementation of high priority actions will begin in 2020, based on City Council direction.

---

<sup>3</sup> This analysis is based on Exhibit 79 in the Tualatin Housing Needs Analysis.



## Summary of Actions

The table below summarizes the strategies, actions, and recommendations made by the CAC. The priority shown in the table is based on discussions with the CAC about the actions they view to be in need of prompt attention. Low-priority actions represent actions that the CAC thinks are important but that may be executed later in the Tualatin 2040 process. At some level, all of the actions in this strategy are a high priority for the CAC.

Strategies, Actions, and Recommendations	Priority
<b>Strategy 1: Ensure an adequate supply of land that is available and serviceable.</b>	
<p><b>Action 1.1. Evaluate opportunities to increase development densities within Tualatin’s existing zones by modifying the Development Code.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 1.1a:</b> Evaluate increasing densities in the Residential High and Residential High Density / High Rise residential designations by allowing buildings that are five to eight stories tall.</li> <li>▪ <b>Recommendation 1.1b:</b> Conduct an audit of the City’s Development Code to identify barriers to residential development (e.g., lot size, setbacks, and lot coverage ratio) and identify alternatives for lowering or eliminating the barriers.</li> <li>▪ <b>Recommendation 1.1c:</b> Evaluate off-street parking requirements for multifamily housing to identify opportunities for reduction in parking requirements, especially for housing developed for groups who have fewer cars.</li> <li>▪ <b>Recommendation 1.1d:</b> Adopt a Planned Unit Development (PUD) ordinance to allow flexibility in both development standards and housing types.</li> </ul>	High
<p><b>Action 1.2. Evaluate opportunities to rezone land to provide additional opportunities for multifamily housing development.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 1.2a:</b> Identify opportunities to rezone industrial or commercial land for mixed-use that includes employment and residential uses.</li> <li>▪ <b>Recommendation 1.2b:</b> Evaluate opportunities to re-zone Residential Low Density and Residential Medium Low Density residential land for higher-density housing.</li> <li>▪ <b>Recommendation 1.2c:</b> Evaluate merging High Density zone and the High Density / High Rise zone into one zone and evaluate increasing the maximum density and maximum height limit allowed.</li> </ul>	High
<p><b>Action 1.3. Plan for infrastructure development to support residential development, consistent with Strategy 6.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 1.3a:</b> Identify opportunities to increase coordination between transportation planning and residential growth to manage congestion from growth.</li> <li>▪ <b>Recommendation 1.3b:</b> Identify opportunities to increase transit service.</li> </ul>	Medium
<p><b>Action 1.4. Plan for long-term development in Tualatin through 2040 and beyond.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 1.4a:</b> Actively work with Metro staff on upcoming Regional Growth Management reports. Coordinate Tualatin’s planning with regional plans.</li> <li>▪ <b>Recommendation 1.4b:</b> Develop and implement a system to monitor the supply of residential land every two years.</li> <li>▪ <b>Recommendation 1.4c:</b> Reevaluate Tualatin’s housing needs and land sufficiency on a schedule tied to the Metro Growth Management cycle.</li> <li>▪ <b>Recommendation 1.4d:</b> When needed in the future, work with Metro on potential expansion of the Metro UGB to include the Stafford area.</li> </ul>	High

Strategies, Actions, and Recommendations	Priority
<b>Strategy 2: Encourage development of a wider variety of housing types.</b>	
<p><b>Action 2.1. Allow and encourage development of duplexes, cottage housing, townhomes, row houses, and triplexes and quadplexes in lower-density residential zones.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 2.1a:</b> Allow duplexes, triplexes, quadplexes, cottage clusters, and townhouses in the Residential Low Density residential zone.</li> <li>▪ <b>Recommendation 2.1b:</b> Allow cottage cluster housing in the Medium-Low Density and Medium-High Density zones, at densities appropriate for the zones.</li> </ul>	Medium
<p><b>Action 2.2. Identify opportunities to increase development of commercial and residential mixed-use development.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 2.2a:</b> Identify opportunities for more mixed-use development.</li> </ul>	Medium
<p><b>Action 2.3. Identify opportunities to allow and support development of additional innovative housing types.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 2.3a:</b> Evaluate allowing and supporting development of other housing types in Tualatin, such as single-room occupancy (more than four unrelated living in the same dwelling with shared kitchen and bathrooms); reuse of cargo containers for housing; tiny homes (dwelling units between 100 and 500 square feet); and higher-amenity housing on larger lots.</li> </ul>	Low
<b>Strategy 3: Support development and preservation of housing that is affordable for all households.</b>	
<p><b>Action 3.1. Identify policies to support development of housing affordable to households earning less than 60% of the median family income in Washington County (\$48,900 or less for a household size of four people).</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 3.1a:</b> Develop policies to support development of housing affordable to households with incomes below 60% of MFI as part of the City's program to leverage funds from the Metro Housing Bond.</li> </ul>	High
<p><b>Action 3.2. Develop policies to support development of housing affordable to people who have income between 60% and 120% of MFI (\$48,900 to \$98,000 for a household of four in Washington County) and live and work in Tualatin.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 3.2a:</b> Emphasize growth of jobs that pay at or above average wages, as part of the City's economic development strategy.</li> <li>▪ <b>Recommendation 3.2b:</b> Identify opportunities to partner with or support employers who are interested in developing an employer-assisted housing program.</li> </ul>	Medium
<p><b>Action 3.3. Develop policies to prevent and address homelessness.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 3.3a:</b> Develop policies to prevent and address homelessness.</li> </ul>	Low
<p><b>Action 3.4. Develop policies to prevent or mitigate residential displacement resulting from redevelopment and increases in housing costs in Tualatin.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 3.4a:</b> Develop policies to prevent displacement of existing residents.</li> <li>▪ <b>Recommendation 3.4b:</b> Develop policies to prevent loss of existing affordable housing.</li> </ul>	Low
<p><b>Action 3.5. Partner with organizations to establish a land bank or land trust.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 3.5a:</b> Determine whether to participate in a land bank or land trust, such as the Proud Ground Community Land Trust.</li> </ul>	Low
<p><b>Action 3.6. Evaluate creative system development charge financing opportunities.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 3.6a:</b> Evaluate options for potential changes to SDCs and TDTs to support development of affordable housing.</li> </ul>	Medium
<p><b>Action 3.7. Evaluate establishment of a tax exemption program to support development of affordable housing.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 3.7a:</b> Evaluate tax exemption options to support development of affordable housing or mixed-use housing.</li> </ul>	Medium

Strategies, Actions, and Recommendations	Priority
<p><b>Action 3.8. Ensure that Tualatin has sufficient staff capacity to implement the housing program priorities set by the City Council.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 3.8a:</b> Determine whether the City will need to add staff to implement the policies in the housing strategy.</li> </ul>	Low
<b>Strategy 4: Identify funding tools to support residential development.</b>	
<p><b>Action 4.1. Evaluate opportunities to use leveraged funds from the Metro Housing Bond to support development of affordable housing.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 4.1a:</b> Evaluate opportunities, such as housing development incentives (in Strategy 3), to use leveraged funding from the Metro Housing Bond to support the development of affordable housing.</li> </ul>	High
<p><b>Action 4.2. Evaluate establishing an urban renewal district.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 4.2a:</b> Continue the evaluation of establishing a new urban renewal district and consider including urban renewal projects that support development of multifamily housing affordable for households earning less than 60% of MFI.</li> </ul>	High
<p><b>Action 4.3. Evaluate implementation of a construction excise tax.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 4.3a:</b> Evaluate implementation of a CET, starting with an analysis of the financial capacity of a CET.</li> </ul>	Medium
<b>Strategy 5: Identify redevelopment opportunities.</b>	
<p><b>Action 5.1. Identify districts within Tualatin with opportunities for redevelopment for housing and employment uses.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 5.1a:</b> Identify opportunities for redevelopment of mixed-use districts and initiate an area planning process to guide redevelopment.</li> </ul>	High
<p><b>Action 5.2. Support redevelopment of underutilized commercial buildings for housing.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 5.2a:</b> Identify underutilized commercial areas that are ripe for redevelopment and work with landowners and developers to support redevelopment.</li> </ul>	Medium
<b>Strategy 6: Ensure there are connections between planning for housing and other community planning.</b>	
<p><b>Action 6.1. Ensure that updates to the Transportation System Plan are coordinated with planning for residential growth.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 6.1a:</b> Evaluate opportunities to decrease dependence on automotive transportation in areas planned for housing.</li> <li>▪ <b>Recommendation 6.1b:</b> Evaluate opportunities to expand transit and improve transportation connectivity in Tualatin, particularly from the future Southwest Corridor station in Bridgeport to the Tualatin's Town Center.</li> <li>▪ <b>Recommendation 6.1c:</b> Evaluate opportunities for planning transit-oriented development.</li> <li>▪ <b>Recommendation 6.1d:</b> Develop a bicycle and pedestrian plan for Tualatin to increase connectivity within Tualatin.</li> </ul>	High
<p><b>Action 6.2. Coordinate planning for economic development planning with housing planning.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 6.2a:</b> Ensure the City includes housing planning for housing that is affordable to people who work at businesses in Tualatin.</li> </ul>	Medium
<p><b>Action 6.3. Develop a design and planning framework for “ten-minute neighborhoods” that include a mixture of uses.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 6.3a:</b> Develop a framework for mixed-use neighborhoods that includes the elements that residents need for day-to-day life.</li> </ul>	Low
<p><b>Action 6.4. Support sustainable development practices.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 6.4a:</b> Evaluate sustainable building practices, including certifications, to determine whether the City should offer incentives for certification or require certification of new buildings as sustainable.</li> </ul>	Low

## **Strategy 1: Ensure an Adequate Supply of Land that is Available and Serviceable**

This strategy is about ensuring an adequate land supply — not only a twenty-year supply (as Goal 10 requires) but also a pipeline of serviced land that is available for immediate development. The following recommended strategies and actions are intended to ensure an adequate supply of residential land through a combination of changes to the Tualatin Development Code, rezoning land, and long-term regional planning for housing. Efficient use of Tualatin’s residential land is key to ensuring that Tualatin has adequate opportunities to grow from 2020 to 2040, and beyond.

### **Issue Statement**

Tualatin’s vacant unconstrained residential land can accommodate about 1,900 new dwelling units, including land within the city limits and Basalt Creek. Development of all of Tualatin’s vacant unconstrained land may occur over a period longer than the twenty-year planning period of this project. The forecast for housing growth over the 2020 to 2040 period is 1,041 new dwelling units.

The results of the HNA show that Tualatin has a surplus of capacity for new housing in the Low Density Residential, Medium Low Density Residential, and High Density Residential Plan Designations but a deficit in the Medium High Density Residential and High Density / High-Rise Residential plan designations. Tualatin has a deficit of 109 dwelling units (about 7 gross acres of land) in the Medium High Density Residential designation and a deficit of 101 dwelling units (about 4 gross acres of land) in the High Density / High-Rise Residential designation.

Tualatin has enough land within its planning area to accommodate the forecast for new housing. The existing zoning, however, leads to deficits of land in the Medium High Density Residential and High Density / High-Rise Residential Plan Designations. Oregon’s statewide planning system requires cities that do not have enough land within their urban growth boundary (UGB) or in selected plan designations to evaluate and implement policies to increase land use efficiently, expand the UGB, or both.

Tualatin is part of the Metro UGB and cannot expand its planning area on its own. However, Tualatin can increase land use efficiency within its planning area by increasing allowable development densities, rezoning land, or planning for redevelopment to meet the needs in the Medium High Density Residential and High Density / High-Rise Residential plan designations. In addition, Tualatin can monitor growth to ensure that the city continues to have sufficient land for residential growth, and it can work with Metro and other regional partners on future expansions of the Metro UGB to accommodate additional residential development in Tualatin.

Tualatin needs land that is vacant with urban services that support residential development, such as municipal water service, sewer and wastewater service, stormwater management systems, and transportation connections with adequate capacity to accommodate growth.

## Goal

Ensure that sufficient land is designated and has urban services to support development so the supply is adequate for all needed housing types at the needed densities. Consider the development-ready residential land supply as part of ongoing functional planning efforts to provide necessary urban services in support of residential development.

## Recommended Actions

### Action 1.1. Evaluate opportunities to increase development densities within Tualatin's existing zones by modifying the Development Code.

This approach seeks to increase housing capacity by increasing allowable density in residential zones. In short, it gives developers the option of building to higher densities. Higher densities increase residential landholding capacity. Higher densities, where appropriate, provide more housing, a greater variety of housing options, and a more efficient use of scarce land resources. Higher densities also reduce sprawl development, add tax revenue that benefits the City (as more units can be built), and make the provision of services more cost effective.

This action will look at increasing allowed densities in the Comprehensive Plan and decreasing minimum lot size standards and/or allowable densities in all residential zones.

Tualatin could modify the density ranges outlined in the Tualatin Development Code. These are currently:

- Residential Low-Density (RL): 1–6.4 dwelling units per acre
- Residential Medium Low–Density (RML): 6–10 dwelling units per acre
- Residential Medium High–Density (RMH): 11–15 dwelling units per acre
- Residential High-Density (RH): 16–25 dwelling units per acre
- Residential High-Density/High-Rise (RH/HR): 26–30 dwelling units per acre

With respect to zoning, Tualatin presently has the following zoning standards:

- P is permitted, C is conditional, and N is not permitted
- Minimum Lot size is in square feet and maximum density is in dwelling units per acre (du/ac)

Zone	Single-Family Detached	Manufactured Home on a Lot	Accessory Dwelling Unit	Manufactured Home Park	Duplex	Townhouse	Multi-family
<b>Residential Low (RL)</b>							
Allowed Uses	P	P	P	N	C	C	C
Minimum Lot Size	6,500 average	6,500 average	-		6,000	6,000	6,000

Zone	Single-Family Detached	Manufactured Home on a Lot	Accessory Dwelling Unit	Manufactured Home Park	Duplex	Townhouse	Multi-family
Maximum Density	6.4 du/ac	6.4 du/ac	Accessory to lot with single family dwelling		6.4 du/ac	6.4 du/ac	6.4 du/ac
<b>Residential Medium Low-Density (RML)</b>							
Allowed Uses	C	N	P	P	P	P	P
Minimum Lot Size	4,500				4,356*	1,400	4,356*
Maximum Density	10 du/ac			12 du/ac	10 du/ac	10 du/ac	10 du/ac
<b>Residential Medium High-Density (RMH)</b>							
Allowed uses	N	N	N	N	P	P	P
Minimum Lot Size					2,904*	1,400	2,904*
Maximum Density					15 du/ac	15 du/ac	15 du/ac
<b>Residential High-Density (RH)</b>							
Allowed Uses	N	N	N	N	P	P	P
Minimum Lot Size					1,742*	1,400	1,742*
Maximum Density					25 du/ac	25 du/ac	25 du/ac
<b>Residential High-Density/High-Rise (RH/HR)</b>							
Allowed Uses	N	N	N	N	P	P	P
Minimum Lot Size					1,452	1,452	1,452*
Maximum Density					30 du/ac	30 du/ac	30 du/ac
<b>Mixed-Use Commercial Overlay Zone (MUCOD)</b>							
Allowed Uses	N	N	N	N	P	P	P
Minimum Lot Size					None	None	None
Maximum Density					50 du/ac	50 du/ac	50 du/ac
<b>Central Tualatin Overlay Zone (RH/HR)</b>							
Allowed Uses	N	N	N	N	P	P	P
Minimum Lot Size (Core Area)					5,000	5,000	5,000
Minimum Lot Size (Noncore Area)					25,000	25,000	25,000
Maximum Density					25 du/ac	25 du/ac	25 du/ac

\*Note: The lot sizes for duplex and multifamily units are based on development on more than one acre. Development on less than one acre has a different standard for minimum lot size.

Changes to lot size standards are legislative changes to the Comprehensive Plan and/or zoning code. As such, this process should be initiated with the Planning Commission and include opportunities for public input.

Recommendation 1.1a: Tualatin should evaluate increasing densities in the residential High and Residential High Density / High Rise designations by allowing buildings that are five to eight stories tall (or higher). The City could increase densities to 60 to 100 dwelling units per acre. Alternatively, the City could allow the zoning standards to dictate the number of new dwelling units, based on standards such as building height limitations, parking requirements per unit, lot coverage ratios, setback requirements, and other zoning standards.

Recommendation 1.1b: Tualatin should conduct an audit of the City's Development Code to identify barriers to residential development (e.g., lot size, setbacks, and lot coverage ratio) and identify alternatives for lowering or eliminating the barriers. For example, the code audit could include these evaluating dimensional standards in all zones to understand the potential impact of development of vacant land (especially smaller or irregularly shaped lots) to identify barriers to infill development.

Recommendation 1.1c: Tualatin should evaluate off-street parking requirements for multifamily housing to identify opportunities for reduction in parking requirements, especially for housing developed for groups who have fewer cars, such as seniors or low-income affordable housing, close proximity to transit stop, and/or additional provision of bicycle parking. The City could consider changes that allow for alternative ways to meet parking requirements or reduce (or eliminate) parking requirements:

- Requiring off-street parking, but not necessarily requiring parking garages.
- Allowing some on-street parking within a set distance of the development to account for some off-street parking requirements.
- Requiring less off-street parking when close (such as within ¼ mile) of a transit stop.
- Requiring additional provision of bicycle parking to reduce parking requirements for the building.

Recommendation 1.1d: Adopt a (Planned Unit Development) PUD ordinance to allow flexibility in both development standards and housing types (subject to a maximum density) in exchange for provision of protected open space through a land use application process; this would require a hearing on the proposed development with the Planning Commission.

### Action 1.2. Evaluate opportunities to rezone land to provide additional opportunities for multifamily housing development.<sup>4</sup>

The community desires rezoning to promote the opportunity of housing redevelopment and development. This action seeks to address the deficit of land in the Medium High Density Residential designation (about 7 gross acres of land) and in the High Density / High-Rise Residential designation (about 4 gross acres of land). The action also seeks to provide additional opportunities for the development of multifamily housing; this may contribute, to providing more opportunities for people who work at businesses in Tualatin to also live in Tualatin.

Recommendation 1.2a: Identify opportunities to rezone industrial or commercial land for mixed-use that includes employment and residential uses. The City should exclude industrial sanctuary land (i.e., land in the Southwest Tualatin Concept Plan area) from this evaluation, as this land has been identified as regionally significant industrial areas.

Recommendation 1.2b: Evaluate opportunities to rezone Residential Low Density and Residential Medium Low Density residential land for higher-density housing.

Recommendation 1.2c: Evaluate merging the High Density zone and the High Density / High Rise zones into one zone, and evaluate increasing the maximum density and maximum height limit allowed in the revised zone, consistent with Action 1.1.

### Action 1.3. Plan for infrastructure development to support residential development, consistent with Strategy 6.

The City already coordinates land use planning with the Capital Improvement Plan to ensure that infrastructure is available to support residential development, especially in newly urbanizing areas and areas identified as high priority for development. Some types of infrastructure development, especially transportation and transit infrastructure, have lagged behind growth in Tualatin and in the broader region, resulting in automotive congestion and insufficient transit service, as discussed in Strategy 6.

Recommendation 1.3a: Identify opportunities to increase coordination between transportation planning and residential growth to manage and reduce congestion resulting from new growth.

Recommendation 1.3b: Identify opportunities to increase transit service between Tualatin and other cities within the Portland region (such as the ongoing planning for the Southwest Corridor) and transit within Tualatin.

---

<sup>4</sup> An alternative to this strategy suggested by a committee member was revising the City's zoning system to the following categories of land use: Suburban Residential (replaces the RL and RML zones) with a maximum of 10 dwelling unit per acre and maximum building height of 45 feet; Urban Residential (replaces the RMH and RH zones) with a minimum density of 15 dwelling units per acre and maximum building height of 65 feet; and Urban II (includes the RH/HR zone) with a minimum density of 30 dwelling units per acre and maximum building height of 100 feet.



#### Action 1.4. Plan for long-term development in Tualatin through 2040 and beyond.

The Housing Needs Analysis plans for the 2020 to 2040 period. It is based on Metro's current forecasts for household growth in Tualatin. The Economic Opportunities Analysis shows that employment will continue to grow in Tualatin at a substantially faster pace than households over the next twenty years.

Tualatin has capacity for residential development beyond the forecasted growth over the next twenty years and may be planning for additional capacity for residential growth through policies to increase multifamily building height and density standards (Action 1.1), increased mixed-use development, (Action 1.2) and redevelopment (Action 5.1). Even so, if Tualatin wants to provide more opportunities for development of housing to allow people to live and work in Tualatin, the City will need to identify additional opportunities for residential development beyond the Tualatin planning area.

A key part of this planning is working with Metro on regional planning for housing and employment in and around Tualatin. The City would be well served by having information to share with Metro about new development, the City's planning efforts to provide opportunities for people to work and live in Tualatin, and economic development plans.

[Recommendation 1.4a:](#) Actively work with Metro staff on upcoming Regional Growth Management reports to ensure that Tualatin's population and employment forecasts are planned for similar growth rates. Coordinate Tualatin's planning with regional plans.

[Recommendation 1.4b:](#) Develop and implement a system to monitor the supply of residential land every two years. This includes monitoring residential development (through permits) as well as land consumption (e.g., development on vacant or land for redevelopment). The reports resulting from growth monitoring can be used for working with Metro to better understand Tualatin's opportunities for growth.

[Recommendation 1.4c:](#) Reevaluate Tualatin's housing needs and land sufficiency on a regular basis tied to the Metro Growth Management cycle (i.e., every six years), as part of the City's coordination with Metro. This recommendation is consistent with new requirements in ORS 197.296 (2)(a)(B)(ii), which was updated through House Bill 2003 to require Metro cities to update their housing needs analysis every six years.

[Recommendation 1.4d:](#) As Tualatin continues to grow and eventually cannot accommodate residential growth within the City, work with Metro on potential expansion of the Metro UGB to include the Stafford area.

## Strategy 2: Encourage Development of a Wider Variety of Housing Types

This strategy focuses on actions that are intended to ensure new residential structures developed in Tualatin are diverse and include missing middle, workforce housing, low to moderate-income senior housing and other housing products to achieve housing affordability for households and to meet Tualatin's twenty-year housing needs.

### Issue Statement

Continued increases in housing costs may increase demand for denser housing (e.g., multifamily housing, single-family attached housing, and compact single-family detached housing). To the extent that denser housing types are more affordable than larger housing types (i.e., single-family detached units on larger lots, such as 2,500 square foot dwelling units on lots larger than 5,000 square feet), continued increases in housing costs will increase demand for denser housing.

Tualatin's housing mix in the 2013–2017 period<sup>5</sup> was 53% single-family detached, 6% single-family attached and 41% multifamily. Of the multifamily housing, about 5% are low-density multifamily housing types such as duplexes, triplexes, and quadplexes. The HNA assumes that the housing mix of new dwelling units in Tualatin will be about 40% single-family detached, 15% single-family attached and 45% multifamily.

To achieve this mix, Tualatin will need to implement policies that allow a wider variety of middle-density housing types (e.g., cottage clusters, townhouses, duplexes, triplexes, and quadplexes), as well as higher-density housing types (e.g., apartment buildings taller than four stories and mixed-use buildings).

In addition, Tualatin will allow for development of housing that is affordable to workers in Tualatin<sup>6</sup> and is located in proximity to employment opportunities to attract needed labor force for its industrial and commercial zones and mixed-use overlay zones. These types of housing include (but are not limited to) live-work units, "skinny" single-family detached housing, townhouses, cottage housing, duplexes and triplexes, and less costly types of multifamily housing.

### Goal

Allow and encourage the development of a broader diversity of housing types, including middle-density housing types and higher-density housing types.

---

<sup>5</sup> Based on 2013–2017 ACS five-year estimates for Tualatin.

<sup>6</sup> The average wage in Tualatin was \$57,300 in 2017. Housing that is affordable to a worker with that wage would have a housing cost of no more than \$1,430 per month. Some workers make less than the average wage and would require housing affordable to lower incomes, as described in Strategy 3.

A single worker with a job paying the average wage could afford a dwelling with a sales price of no more than \$230,000. Given that the average sales price in Tualatin in early 2019 was \$480,000, housing affordable at the average wage in Tualatin is likely to be rental housing. If the household has two full-time workers with jobs paying the average wage, the household may be able to purchase a dwelling in Tualatin.

## Recommended Actions

**Action 2.1. Allow and encourage development of duplexes, cottage housing, townhomes, row houses, and triplexes and quadplexes in lower-density residential zones.**

Allowing these housing types can increase overall density of residential development and may encourage a higher percentage of multifamily housing types.

This approach could be implemented through the local zoning or development code. These housing types would be listed as outright allowable uses in appropriate residential zones. These housing types may provide additional affordability and allow more residential units than would be achieved by detached homes alone.

The City has already partially implemented this strategy. The City already allows one accessory dwelling unit for existing single-family units. Tualatin allows duplexes, townhouses, and multifamily housing as a conditional use in the Residential Low Density residential zone. Tualatin allows duplexes, townhouses, and multifamily housing as a permitted use in the Medium-Low Density and Medium-High Density residential zones.

This strategy would move Tualatin toward compliance with the potential requirements of House Bill 2001, which passed during 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:

- (A) duplexes,
- (B) triplexes,
- (C) quadplexes,
- (D) cottage clusters, and
- (E) townhouses.

To comply with House Bill 2001, Tualatin will need to:

- Allow cottage cluster as a housing type in the Residential Low Density residential zone. Tualatin may want to allow cottage cluster housing in the Medium-Low Density and Medium-High Density residential 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 residential zone.

[Recommendations 2.1a: Allow duplexes, triplexes, quadplexes, cottage clusters, and townhouses in the Residential Low Density residential zone.](#) Tualatin will also need to revise the Development Code to include development standards for these housing types. As part of implementation of House Bill 2001, the Oregon Department of Land Conservation and Development (DLCD) will be developing a model code for cities to accommodate these housing types. Given that the model code may not be available before December 2020 and the deadline for adoption of policies to meet the requirement

of House Bill 2001 is June 30, 2022, Tualatin should begin the process to identify changes necessary to implement House Bill 2001 before the model code is available.

[Recommendations 2.1b:](#) Allow cottage cluster housing in the Medium-Low Density and Medium-High Density residential zones, at densities appropriate for the zones.

**Action 2.2. Identify opportunities to increase development of commercial and residential mixed-use development.**

One way to provide additional opportunities for housing development, especially multifamily housing development, is through planning for mixed-use development. Tualatin defines mixed-use development as “a tract of land or building or structure with two or more different uses such as, but not limited to residential, office, retail, manufacturing, public or entertainment, in a compact urban form.”

The Economic Opportunities Analysis shows that Tualatin has a small amount of vacant unconstrained commercial land (11 acres). Strategy 5 (redevelopment) recommends identifying opportunities for redevelopment, especially for mixed-use development. Both the Economic Opportunities Analysis and Housing Needs Analysis document the fact that most people who work in Tualatin live elsewhere and that there are relatively few opportunities for housing for people who want to live and work in Tualatin.

One way to increase opportunities for this type of housing is to increase the overall amount of housing affordable to people who work at jobs in Tualatin, much of which will be multifamily housing and should be located near employment centers in Tualatin. Increasing opportunities for mixed-use development can address both of these issues.

[Recommendation 2.2a:](#) Identify opportunities for more mixed-use development, either through rezoning land to a mixed-use zone and/or through redevelopment (consistent with Action 5.1).

### Action 2.3. Identify opportunities to allow and support development of innovative housing types.

Some housing types have traditionally not been present in Tualatin, either because they are not allowed or because the market is not developing them. Some innovative housing types may include single-room occupancy (more than four unrelated living in the same dwelling with shared kitchen and bathrooms); reuse of cargo containers for housing; tiny homes (dwelling units between 100 and 500 square feet); and other innovative housing types.

In addition, growth of seniors is increasing demand for single-level single-family detached units to allow seniors to remain in Tualatin as they age. While this type of unit is allowed in Tualatin, little of this housing has been developed over recent years.

Tualatin's land base does not provide opportunity for development of higher-amenity housing on larger lots. This type of housing generally appeals to households with higher incomes. When Tualatin is evaluating opportunities for UGB expansion, there may be opportunities for development of this type of housing in areas where developing higher-density housing is challenging or undesirable, such as on hillsides.

[Recommendation 2.3a: Evaluate allowing and supporting development of other housing types in Tualatin, such as single-room occupancy \(more than four unrelated living in the same dwelling with shared kitchen and bathrooms\); reuse of cargo containers for housing; tiny homes \(dwelling units between 100 and 500 square feet\); and higher amenity housing on larger lots.](#)

### Strategy 3: Support development and preservation of housing that is affordable for all households

The following recommended strategy and actions are intended to use a deliberate set of mandates and incentives to support the development of new affordable housing and preserve existing affordable housing.

#### Issue Statement

Availability of housing that is affordable to households at all income levels is a key issue in Tualatin. For the purposes of this strategy, affordable housing is defined as 1) housing for very low-income and extremely low-income households at 50% or below the median family income (MFI)<sup>7</sup> (\$41,000 in 2018); 2) housing for low-income households with incomes between 50% and 80% of the MFI (\$41,000 to \$65,000 in 2018); and 3) housing for middle-income households with incomes between 80% and 120% of the MFI (\$65,000 to \$98,000 in 2018).

The City's policy options for providing opportunities to build housing, especially affordable housing (both market-rate and government-subsidized affordable housing) are limited. The most substantial ways the City can encourage development of housing is through ensuring that

---

<sup>7</sup> Based on U.S. Department of Housing and Urban Development Median Family Income of \$81,400 for Washington County in 2018.

enough land is zoned for residential development, in addition to assembling and purchasing land for affordable housing development, eliminating barriers to residential development where possible, and providing infrastructure in a cost-effective way.

Based on the actions identified below and the priorities set by decision makers, the City should develop a comprehensive housing strategy that supports the development of long-term (30–60 years) affordable housing that is government-subsidized which is developed by nonprofits, private developers, and/or in partnership between any of the following: public, nonprofit, and/or private developers. The Tualatin Housing Program will use a variety of tools, such as those described in this memorandum, to lower barriers to and encourage affordable housing development.

## Goal

The goal of this strategy is to promote more lower-cost housing, with a focus on low and middle-income housing, creating mixed-income neighborhoods. This focus is to ensure that there is housing that is affordable to workers at businesses in Tualatin.

## Recommended Actions

**Action 3.1. Identify policies to support development of housing affordable to households earning less than 60% of the median family income in Washington County (\$48,900 or less for a household size of four people).**

Evaluate policies to support development of low-income housing that would be affordable to households earning less than 80% of the MFI in Washington County (\$65,000 for a household size of four people), many of whom may be eligible for income-restricted housing, which is commonly known as low-income housing. These policies will leverage funds from the Metro Housing Bond (discussed in Strategy 4). Some examples of support include:

- Reducing or waiving systems development charges (SDCs) and Transportation Development Tax (TDT) fees (see Action 3.6).
- Evaluating adoption of a tax exemption program (see Action 3.7).
- Providing density bonuses for development of housing affordable to households with incomes below 60% of the MFI.
- Participating in a land bank for housing affordable to households with incomes below 60% of the MFI (see Action 3.5).
- Evaluating adoption of an inclusionary zoning program to require market-rate development to include some housing affordable to households with incomes below 80% of the MFI.
- Developing an expedited review process for development of affordable housing projects that target housing affordability at 60% of the MFI.

- Partnering with Washington County Housing Services and Oregon Housing and Community Services (OHCS) to identify resources for developing additional housing affordable for household with incomes of below 60% of the MFI.

[Recommendation 3.1a: Develop policies to support development of housing affordable to households with incomes below 60% of the MFI, as part of the City’s program to leverage funds from the Metro Housing Bond.](#)

**Action 3.2 Develop policies to support development of housing affordable to people who have incomes between 60% and 120% of the MFI (\$48,900 to \$98,000 for a household of four in Washington County) and live and work in Tualatin.**

Workforce housing is housing that is affordable to households earning between 60% and 120% of the MFI (\$48,900 to \$98,000 for a household of four in Washington County). An important part of this action is coordinating with economic development planning. In 2017, the average wage for jobs in Tualatin was \$57,300.

Action 3.1 includes housing policies for households earning between 60% and 120% of the MFI. Some additional ways that the City may support development of housing affordable to households with incomes between 60% and 120% of the MFI are:

- Coordinating planning for economic development with planning for residential development to emphasize the growth of jobs that pay at or above Tualatin’s average wage (\$57,300 in 2017).
- Supporting and potentially partnering with employers who are interested in developing an employer-assisted housing program to provide grants or loans to support rehabilitation or new housing development.
- Partnering with Washington County Housing Services and Oregon Housing and Community Services (OHCS) to identify resources for developing additional housing affordable for household with incomes between 80% and 120% of the MFI.
- Participating in a land bank for housing affordable to households with incomes between 80% and 120% of the MFI (see Action 3.5).

[Recommendation 3.2a: Emphasize growth of jobs that pay at or above average wages, as part of the City’s Economic Development Strategy.](#)

[Recommendation 3.2b: Identify opportunities to partner with or support employers who are interested in developing an employer-assisted housing program.](#)

### Action 3.3. Develop policies to prevent and address homelessness.

Households earning less than 30% of the MFI (\$24,000 or less for a family of four) are at risk of becoming homeless. They can afford monthly rent of \$600 or less. About 16% of households in Tualatin currently fit into this income category. Tualatin has a deficit of about 1,400 units affordable to households with incomes of \$25,000 or less.

Tualatin can use approaches similar to those in Action 3.1 to support development of housing affordable to these households, including using funds from the Metro Housing Bond. Tualatin can also take the following actions to prevent and address homelessness:

- Develop a strategic plan to address homelessness and strengthen partnerships between the City and service providers who assist people experiencing homelessness.
- Partner with service providers to expand rapid rehousing and permanent supportive housing programs.
- Partner with service providers to support the creation of overnight shelters that provide safe sleeping options for people who are unsheltered. Work with service providers to explore alternatives to congregate shelters.

There are many other actions that Tualatin can take to prevent and address homelessness, such as expansion of transportation options, increasing outreach to the homeless population, partnering with service providers of mental health services, supporting a crisis intervention team, and other services.

[Recommendation 3.3a: Develop policies to prevent and address homelessness.](#)



### Action 3.4. Develop policies to prevent or mitigate residential displacement resulting from redevelopment and increases in housing costs in Tualatin.

Redevelopment and development of new housing can increase housing costs and displace existing residents. Housing that is currently affordable to households, such as those earning below 60% of the MFI (less than \$48,900 for a household of four) or between 60% and 120% of the MFI (\$48,900 to \$98,000 for a household of four), can become unaffordable as a result of redevelopment and overall increases in housing costs in Tualatin, making it harder for existing residents of Tualatin and people working at businesses in Tualatin to afford to live in Tualatin.

- Identify funding to allocate to housing programs that prevent and alleviate the risk of displacement, such as the funding sources identified in Strategy 4, to fund programs such as the ones below.
- Evaluate the feasibility of developing a housing preservation and development program to assist with capital repairs, façade improvements, or weatherization. Tualatin may consider criteria for funding, such as the property must be regulated affordable or at risk of converting to market rate. Tualatin could consider offering funds to low-cost market-rate properties in need of major structural repairs (in return for the property owner maintaining existing rent levels).
- Partner with organizations to support programs that preserve market-rate housing and affordable housing. These partnerships can include programs such as provision of grants or low-interest loans to support rehabilitation of existing, older single-family detached homes in poor condition, and/or extending existing Low Income Housing Tax Credit projects for an additional term or converting to long-term affordable housing
- Limit condominium conversions. Develop and evaluate requirements for multifamily building owners who want to convert the apartment units to condominiums. Limitations may restrict the conditions under which conversion is allowed, (e.g., based on vacancy rates or tenant consent). Limitations could require that tenants be offered a right of first refusal to purchase their unit, should the owner want to convert their property to a condominium.
- Work with agencies who offer Fair Housing education and enforcement. Provide landlords and tenants with education of rights and responsibilities under Fair Housing Act and provide resources for enforcement actions where Fair Housing law has been violated. Tualatin could provide resources/information about the Housing Choice Voucher Program to reduce the extent to which landlords discriminate against voucher recipients in Tualatin.

[Recommendation 3.4a: Develop policies to prevent displacement of existing residents.](#)

[Recommendation 3.4b: Develop policies to prevent loss of existing affordable housing.](#)

### Action 3.5. Partner with organizations to establish a land bank or land trust.

A land bank supports housing affordability by reducing or eliminating land or acquisition costs from a developer's total development budget. Land banks take several forms, but many are administered by a nonprofit or government entity with a mission of managing a portfolio of properties to support a public or community purpose over many years or decades. The land banking process involves key procedural steps, including (1) strategic land and property acquisition, (2) restoration of the property (e.g., clear blight, clear title), and (3) resale to a buyer.

A land trust is similar to land banking in that they participate in strategic land and property acquisition and restoration of the property (e.g., clear blight, clear title). Though instead of ultimately selling the property (land and buildings), the land trust holds the land in perpetuity and sells or leases the buildings. A land trust is typically a private or nonprofit organization that leases or sells the buildings (e.g., dwelling units) sited on the land but owns and manages the land permanently. A land trust can support housing affordability by leasing the dwelling units on their land to income-qualified renters. If the land trust prefers to pursue homeownership objectives, they can enact a deed covenant prior to selling the dwelling units to safeguard lasting affordability for homeowners.

The City's role in a land bank or land trust may include:

- Identifying opportunities to assist with assembly of land into a single tax lot or multiple adjacent tax lots in certain cases (i.e., mixed-use development with more than one developer involved) to support development of affordable housing.
- Identifying surplus publicly-owned properties that could be used for affordable housing and partner with developers of affordable housing (consistent with Actions 3.1 or 3.2).

[Recommendation 3.5a: Determine whether to participate in a land bank or land trust, such as the Proud Ground Community Land Trust, and determine the City's role in the land banking process.](#)

### Action 3.6. Evaluate creative system development charge financing opportunities.

Opportunities to change the way that the City collects system development charges (SDC) and the Transportation Development Tax (TDT) include (1) reducing or waiving system development charges for residential development that meets Tualatin's housing needs or goals (such as the development of housing affordable to households earning less than 60% of the MFI [\$48,900 for a household of four]); (2) implementing an SDC financing credit program to incentivize needed housing types; (3) developing a sliding scale of SDC based on the size of the units, charging lower SDC for smaller units; (4) implementing a sole source system development charge program; (5) vesting SDC rates on submission of the complete land use review application to determine the SDC early in the development process; and (6) collecting SDC at completion of construction (prior to issuance of a certificate of occupancy) rather than at issuance of the building permit.

[Recommendation 3.6a: Review options for potential changes to SDC and TDT to determine if one or more of the options above is appropriate for Tualatin and implement changes to SDCs and the TDT, as appropriate.](#)

**Action 3.7. Evaluate establishment of a tax exemption program to support development of affordable housing.**

Tax exemption programs typically provide exemptions from property taxes for ten years, and for some, up to twenty years. Tax exemption programs include the following:

Program	Vertical Housing Development Zones (VHDZs)	Multiunit Housing (a.k.a. MUPTe)	Low-Income Rental Housing/Nonprofit Corporation Low-Income Housing	Tax Exemption for Newly Rehabilitated or Constructed Multiunit Rental Housing
<b>Eligible Projects/ Properties</b>	Must include at least one “equalized floor” of residential; at least 50% of the street-facing ground floor area must be committed to nonresidential use. Can be new construction or rehabilitation. City can add other criteria.	Housing subject to a housing assistance contract with a public agency; OR housing that meets City-established criteria for design elements benefitting the general public and number of units. May be new construction, addition of units, or conversion of an existing building to residential use.	New rental housing exclusively for low-income households (at or below 60% MFI); rental housing for low-income persons (at or below 60% MFI) that is owned, being purchased, and/or operated by a nonprofit; or land held for affordable housing development.	Newly rehabilitated or constructed multiunit rental housing. Rental units affordable to households with an annual income at or below 120% of MFI.
<b>Eligible Areas</b>	Within designated areas. City may designate any area it chooses. <sup>8</sup>	Within designated areas. City may designate core areas. Alternatively, the City can designate the entire city and limit the program to affordable housing.	Anywhere in the city	Anywhere in the city
<b>Duration of Tax Exemption/ Abatement</b>	Exemption is for 10 years (this is set in statute, not by the City).	Exemption is for up to 10 years, except for low-income housing, exemption can be extended for as long as the housing is subject to the public assistance contract.	For the low-income rental housing program, exemption lasts 20 years.	City must establish a schedule that provides longer exemptions for projects with more qualifying units, with a maximum of 10 years.
<b>Best Suited for</b>	Encouraging mixed-use development in locations where ground floor commercial uses are essential to the vision and mixed-use is not economically feasible yet.	Encouraging multifamily housing in strategic locations or supporting development of housing affordable households with income of 80% of MFI or lower.	Reducing operating costs for regulated affordable housing affordable at 60% MFI or below.	Incentivizing market-rate/moderate-income multifamily housing development citywide.

**Recommendation 3.7a: Review tax exemption options to support development of affordable housing or mixed-use housing to determine if one or more of the options**

<sup>8</sup> The prior statutes governing the VHDZ program specified certain types of areas where VHDZs could be designated. The current version of the statute leaves this decision entirely up to the City. However, logically, the zoning would need to allow both residential and nonresidential uses in order to allow development that could be eligible for VHDZ tax abatement.

above is appropriate for Tualatin and implement the tax exemption program(s) identified as appropriate for Tualatin.

**Action 3.8.** Ensure that Tualatin has sufficient staff capacity to implement the housing program priorities set by the City Council.

The Housing Strategy presented in this memorandum, and especially the actions presented in Strategy 3 and Strategy 4, will take substantial staff time to evaluate and implement. The City may need additional staffing to implement the Housing Strategy.

Recommendation 3.8a: As the City Council sets priorities for implementation of the Housing Strategy, the Council should work with the City Manager and Community Development Director to determine whether the City will need to add staff to implement the policies in the Housing Strategy.

## **Strategy 4: Identify Funding Tools to Support Residential Development**

The following recommended strategy and actions are intended to consider a range of funding tools that Tualatin may implement and use to support residential development.

### **Issue Statement**

Funding for affordable housing and the infrastructure that serves residential land is becoming increasingly difficult. Cities have adopted a broad range of tools to support affordable housing. The nature of those tools is dependent on local factors: tax base, council support, competing priorities, etc.

Funding affordable housing programs from existing revenue sources may be challenging. Supplemental tools will be necessary if the City wants to support residential development.

### **Goal**

Explore creative and sound ways to support development of affordable housing and infrastructure development.

### **Recommended Actions**

**Action 4.1.** Evaluate opportunities to use leveraged funds from the Metro Housing Bond to support development of affordable housing.

Evaluate opportunities to use leveraged funds from the Metro Housing Bond to support development of affordable housing. The Metro Housing Bond is for \$652.8 million, the majority of it will support development of at least 3,900 new affordable units. Most of the new units will be affordable to households with income below 60% of the MFI (\$48,600 for a family of four) or less. Funds from the bond measure can be used for building new affordable units, housing purchase and rehabilitating existing housing, buying land for new affordable housing, and producing affordable homeownership units.

Washington County has been allocated \$118.9 million from the bond. The County's draft Local Implementation Strategy allocates Tualatin \$17.5 million for new construction of about 175 units

of housing affordable for individuals and families. In addition, the County anticipates \$30.6 million in additional funds for Tualatin to support this housing development from sources such as Low Income Housing Tax Credits (LIHTC), private resources such as loans from private banks, property tax exemptions, Washington County HOME Partnership Investment Program funds, Washing County Housing Production Opportunity Fund, and resources from partner jurisdictions (such as fee waivers or exemptions, donated or discounted land, grants, or other resources).

The programs discussed in Strategy 3 (especially in Actions 3.1, 3.4, and 3.7) are ways that the City can support and leverage funding from the Metro Housing Bond. In addition, Actions 4.2 (Urban Renewal) and 4.3 (CET) can also leverage funding from the Metro Housing Bond.

[Recommendation 4.1a: Evaluate opportunities, such as housing development incentives \(from Strategy 3\), to use leveraged funding from the Metro Housing Bond to support the development of affordable housing.](#)

#### **Action 4.2. Evaluate establishing an urban renewal district.**

As the City evaluates establishing a new urban renewal district (which is currently an ongoing process within the City), evaluate opportunities to support development of affordable housing programs (Strategy 3) funded through urban renewal. The City should also evaluate development of infrastructure (Strategy 1) and redevelopment opportunities (Strategy 5) to support residential development.

Tax increment finance revenues (TIFs) are generated by the increase in total assessed value in an urban renewal district (from the time the district is first established). As property values increase in the district, the increase in total property taxes (i.e., City, County, school portions) is used to pay off the bonds. When the bonds are paid off, the entire valuation is returned to the general property tax rolls. TIFs defer property tax accumulation by the City and County until the urban renewal district expires or pays off the bonds. Over the long term (most districts are established for a period of twenty or more years), the district could produce significant revenues for capital projects. Urban renewal funds can be invested in the form of low-interest loans and/or grants for a variety of capital investments:

- Redevelopment projects, such as mixed-use or infill housing developments
- Economic development strategies, such as capital improvement loans for small or start-up businesses that can be linked to family-wage jobs
- Streetscape improvements, including new lighting, trees, and sidewalks
- Land assembly for public as well as private reuse
- Transportation enhancements, including intersection improvements
- Historic preservation projects
- Parks and open spaces

As the City continues its ongoing evaluation of establishing a new urban renewal district, the City should consider including urban renewal projects that support development of multifamily housing affordable for households earning less than 60% of the MFI (\$48,600 for a household of four). Cities primarily use urban renewal funds to support the development of affordable housing by purchasing land and accepting development proposals on that land. Cities typically require some percentage of housing to be affordable, or they make the inclusion of affordable housing a criterion for the evaluation of development proposals.

In addition, cities use urban renewal funds to directly invest in infrastructure projects that benefit housing development.

[Recommendation 4.2a](#): As the City continues its ongoing evaluation of establishing a new urban renewal district, the City should consider including urban renewal projects that support development of multifamily housing affordable for households earning less than 60% of the MFI.

#### **Action 4.3. Evaluate implementation of a construction excise tax.**

The construction excise tax (CET) is a tax assessed on construction permits issued by local cities and counties. The tax is assessed as a percent of the value of the improvements for which a permit is sought, unless the project is exempted from the tax. 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. CETs may be residential only, commercial only, or residential and commercial. If the City were to adopt a CET, the tax would be up to 1% of the permit value on residential construction and an uncapped rate on commercial and industrial construction.

The allowed uses for CET funding are defined by the state statute. The City may retain 4% of funds to cover administrative costs. The funds remaining must be allocated as follows, if the City uses a residential CET:

- 50% must be used for developer incentives (e.g., fee and SDC waivers, tax abatements, etc.).
- 35% may be used flexibly for affordable housing programs, as defined by the jurisdiction.
- 15% flows to Oregon Housing and Community Services for homeowner programs.

If the City implements a CET on commercial or industrial uses, 50% of the funds must be used for allowed developer incentives, while the remaining 50% is unrestricted. The rate may exceed 1% if levied on commercial or industrial uses.

[Recommendation 4.3a](#): Evaluate implementation of a CET, starting with an analysis of the financial capacity of a CET based on historical construction rates and the amount of the CET. The fiscal potential will provide a foundation that (1) helps determine whether a CET would generate enough revenue to make an impact, and (2) helps focus discussion on how the City could generate the best return on investment of CET funds.

## Strategy 5: Identify Redevelopment Opportunities

This strategy focuses on actions that are intended to identify redevelopment opportunities in areas where housing would be appropriate.

### Issue Statement

Tualatin has a deficit of land for housing, a deficit of 109 dwelling units in the Medium High Density Residential designation and a deficit of 101 dwelling units in the High Density / High-Rise Residential designation. Some (or perhaps all) of this deficit could be accommodated through redevelopment of existing areas within Tualatin, where there are opportunities to increase the intensity of land uses. Redevelopment may also provide opportunities for the development of mixed-use areas that are more walkable, have amenities that households frequently access (e.g., schools, medical facilities, parks, retail, restaurants, and other services), and have access to transit, consistent with the actions in Strategy 6.

Redevelopment may require actions from other strategies, such as increasing allowable densities, up-zoning, density bonuses for affordable housing, land assembly, reduced parking requirements, tax abatement programs to support housing development, and funding support such as an urban renewal district.

As the City plans for redevelopment, it should be sensitive to the potential for displacement of existing residents. Action 3.4 includes measures to mitigate displacement resulting from redevelopment.

### Goal

Redevelop selected areas of Tualatin to create vibrant mixed-use districts that include new housing opportunities.

### Recommended Actions

#### Action 5.1. Identify districts within Tualatin with opportunities for redevelopment for housing and employment uses.

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 and projects a substantial deficit of land to accommodate new housing.

The City should identify three to four 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. For example, some areas that may be appropriate for redevelopment include the Commons, areas near key transit stops, and the area west of 6<sup>th</sup> Street/east of 90<sup>th</sup> Street/north of Sagert Street. In selecting areas ripe for redevelopment, the City should consider whether economic conditions support redevelopment and landowner attitudes to redevelopment, and it should also set criteria based on transportation and transit connections and proximity to existing employment centers.



The City should 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 should include working with landowners to ensure they are supportive of the plans, as well as involving stakeholder and citizen input into the vision for the district and development of the redevelopment plans.

The City should consider opportunities to support redevelopment, such as urban renewal (Action 4.2), to address infrastructure deficiencies or to support development of affordable housing, funding from the Metro Housing Bond (Action 4.1) for affordable housing development, land banking (Action 3.5), opportunities to reduce SDCs (Action 3.6), and property tax exemptions (Action 3.7) to support housing development.

[Recommendation 5.1a: Initiate a process to identify opportunities for redevelopment of mixed-use districts and initiate an area planning process to guide redevelopment.](#)

#### **Action 5.2. Support redevelopment of underutilized commercial buildings for housing.**

Tualatin has several underutilized commercial buildings, such as stores that have closed, that may be appropriate for redevelopment. The City should work with landowners to evaluate opportunities for redeveloping vacant buildings for new housing.

The City should consider opportunities to support redevelopment of underutilized commercial buildings, such as urban renewal, to address infrastructure deficiencies or support development of affordable housing, such as the Metro Housing Bond (Action 4.1) or property tax abatements (Action 3.7).

[Recommendation 5.2a: Identify underutilized commercial areas that are ripe for redevelopment and work with landowners and developers to support redevelopment.](#)

## Strategy 6: Ensure There are Connections between Planning for Housing and Other Community Planning

This strategy focuses on actions that are intended to ensure coordination between planning for housing and other community planning, such as transportation planning or neighborhood planning.

### Issue Statement

Discussions of residential development led to discussions of the design of neighborhoods and connectivity in Tualatin and a desire for more deliberate planning of new residential development to integrate multiple modes of transportation, access to parks and schools, and retail and services in or near neighborhoods. Given that large parts of Tualatin are already built out, this type of planning will need to consider long-term redevelopment opportunities to retrofit the existing built environment into neighborhoods with these characteristics.

This type of planning should occur with attention paid to equity issues, ensuring that neighborhoods with these characteristics are developed in a way that does not displace existing households and provides opportunity for housing for all residents of Tualatin, regardless of income, age, or race/ethnicity. This implies development of neighborhoods with a mixture of incomes, homeowners and renters, and a mixture of housing types (i.e., both single-family detached housing and attached or multifamily housing).

### Goal

Ensure that Tualatin develops as a walkable and complete community with amenities that are easily accessible to people who live in Tualatin.

### Recommended Actions

#### Action 6.1. Ensure that updates to the Transportation System Plan are coordinated with planning for residential growth

The next update to the Transportation System Plan (TSP) should coordinate planning for housing, as well as employment growth, with transportation planning, providing for opportunities for more intensive multifamily development where there is sufficient capacity for automotive and transit capacity. The redevelopment areas (Action 5.1) should be planned for in areas where there is higher capacity for automotive and transit, as well as being connected by pedestrian and bicycle trails.

The update to the TSP ensures there are additional opportunities to decrease dependence on automotive transportation, such as increased focus on development in walkable and bikeable areas and increases in transit service (amount and frequency of transit, as well as increased destinations for transit). The TSP update should also identify opportunities to address capacity issues on Tualatin's roads to ease congestion and make traveling by car within and outside of Tualatin easier.

[Recommendation 6.1a: Evaluate opportunities to decrease dependence on automotive transportation in areas planned for housing, such as increased focus on development in](#)

walkable and bikeable areas and increases in transit service (amount and frequency of transit, as well as increased destinations for transit).

[Recommendation 6.1b](#): Evaluate opportunities to expand transit and improve transportation connectivity in Tualatin, particularly from the future Southwest Corridor station in Bridgeport to the Tualatin’s Town Center and vital services, and out to the neighborhoods.

[Recommendation 6.1c](#): Evaluate opportunities for planning transit-oriented development as transit becomes more available in Tualatin, consistent with redevelopment planning.

[Recommendation 6.1d](#): Develop a bicycle and pedestrian plan for Tualatin to increase connectivity within Tualatin.

### Action 6.2. Coordinate planning for economic development with housing planning.

Tualatin has a jobs-housing imbalance, with more jobs than residents in Tualatin. The other strategies in this memorandum are intended to support development of housing that is affordable to people who work at businesses in Tualatin (the average wage was \$57,300 in 2017), such as Action 3.2. The City should evaluate opportunities to support development of housing that is affordable to workers at businesses in Tualatin to ensure that people who work in Tualatin have the opportunity to live in Tualatin. As part of this evaluation, the City should identify opportunities for residential development closer to jobs in Tualatin, to make it easier for people to walk, bicycle, or use transit to get to work. These opportunities are parts of the strategies throughout this memorandum.

[Recommendation 6.2a](#): Ensure the City includes housing planning for housing that is affordable to people who work at businesses in Tualatin.

### Action 6.3. Develop a design and planning framework for “ten-minute neighborhoods” that include a mixture of uses.

The City should develop a framework for development of mixed-use neighborhoods that results in neighborhoods where residents have easy, convenient access to many of the places and services they use daily without relying heavily on a car. The framework would include the following elements: walkable neighborhoods with access to transit, nearby parks (i.e., within one-quarter mile), neighborhood retail and restaurants, and near schools. The neighborhood would have higher concentrations of people and would be complete with sidewalks, bike lanes, and bus routes that support a variety of transportation options. The design of the neighborhood should integrate design standards that promote public safety. In larger cities, these are referred to as “twenty-minute neighborhoods,” but given Tualatin’s smaller size, the scale might be more like “ten-minute neighborhoods.”

[Recommendation 6.3a](#): Develop a framework for mixed-use neighborhoods that includes the elements that residents need for day-to-day life.

#### Action 6.4. Support sustainable development practices.

Sustainable development practices are environmentally responsible and resource-efficient building practices that range from building design, building construction, and building operations and maintenance. Examples of sustainable building practices include certification programs such as Leadership in Energy and Environmental Design (LEED) or National Green Building Standard.

The City could support sustainable development practices by offering incentives for certified buildings, or the City could require that new buildings adhere to specified sustainable building practices.

The trade-off with some types of sustainable building practices is that they can increase development costs (especially over the short run) and may make it more difficult to develop housing affordable for middle and lower-income households. Over the long run, some sustainable building practices pay for themselves with decreased operational costs (such as energy-efficient features that reduce heating and cooling costs).

[Recommendation 6.4a: Evaluate sustainable building practices, including certifications, to determine whether the City should offer incentives for certification or require certification of new buildings as sustainable.](#)

# Appendix A: Tualatin's Existing Comprehensive Plan Policies

## Section 4.050 General Growth Objectives.

The following are general objectives used as a guide to formulate the Plan. The objectives are positive statements to describe the Plan's intent to:

- (1) Provide a plan that will accommodate a population range of 22,000 to 29,000 people.
- (2) Cooperate with the Metropolitan Service District to reach regional consensus on population growth projections within the Tualatin area.
- (3) Conform to Metropolitan Service District (Metro) procedures for initiating amendments to the Metro Urban Growth Boundary.
- (4) Provide a plan that will create an environment for the orderly and efficient transition from rural to urban land uses.
- (5) Convert agricultural land only if needed for urban uses.
- (6) Arrange the various land uses so as to minimize land use conflicts and maximize the use of public facilities as growth occurs.
- (7) Prepare a balanced plan meeting, as closely as possible, the specific objectives and assumptions of each individual plan element.
- (8) Define the urban growth boundary.
- (9) Prepare a plan providing a variety of living and working environments.
- (10) Encourage the highest quality physical design for future development.
- (11) Coordinate development plans with regional, state, and federal agencies to assure consistency with statutes, rules, and standards concerning air, noise, water quality, and solid waste. Cooperate with the U.S. Fish and Wildlife Service to minimize adverse impacts to the Tualatin River National Wildlife Refuge from development in adjacent areas of Tualatin.
- (12) Adopt measures protecting life and property from natural hazards such as flooding, high groundwater, weak foundation soils and steep slopes.
- (13) Develop regulations to control sedimentation of creeks and streams caused by erosion during development of property.
- (14) Develop a separate growth program that controls the rate of community growth and is acceptable to the Land Conservation and Development Commission.
- (15) Arrange the various land uses in a manner that is energy efficient.

- (16) Encourage energy conservation by arranging land uses in a manner compatible with public transportation objectives.
- (17) Maintain for as long a period as possible a physical separation of non-urban land around the City so as to maintain its physical and emotional identity within urban areas of the region.
- (18) Fully develop the industrial area located in Washington County west of the City only when adequate transportation facilities are available and the area has been annexed to the City and served with water and sewer services.
- (19) Cooperate with Washington County to study the methods available for providing transportation, water and sewer service to the industrial area west of the City, designating this area as a special study area.
- (20) Initiate annexation of property within the Urban Growth Boundary planned for residential development only when petitioned to do so by owners of the affected property, including cases involving unincorporated "islands" of property surrounded by land annexed previously.
- (21) Territories to be annexed shall be in the Metro Urban Growth Boundary.
- (22) Address [Metro's Urban Growth Management Functional Plan, Title 13](#), Nature in Neighborhoods, through the conservation, protection and restoration of fish and wildlife habitat, including Metro's Regionally Significant Fish and Wildlife Habitat, through the Tualatin Basin Natural Resource Coordinating Committee and the Tualatin Basin Program.

(a) Support and implement the elements of the Tualatin Basin Program to:

- (i) Develop and adopt local policies and regulations to implement the provisions of the Tualatin Basin Program.
- (ii) Adopt low impact development (LID) provisions to reduce environmental impacts of new development and remove barriers to their utilization.
- (iii) Coordinate with Clean Water Services (CWS) to implement their Healthy Streams Action Plan and other programs such as their Stormwater Management Plan and Design and Construction Standards.
- (iv) Coordinate with CWS, Metro and others to develop and support the funding, voluntary and educational components of the Tualatin Basin Program.
- (v) Coordinate with CWS, Metro and others to develop and support the monitoring and adaptive management components of the Tualatin Basin Program.

(b) Continue active participation in the Tualatin Basin Natural Resources Coordinating Committee and the Steering Committee to support and implement the Tualatin Basin Program.

(c) Coordinate with CWS and Metro to update Metro's Regionally Significant Fish and Wildlife Habitat Inventory Map. Changes to the Inventory Map will be on-going as on-site inventories are conducted as part of private and public construction projects.

(d) Support and implement provisions allowing public access to planned public facilities.

### Section 5.030 General Objectives.

The following are general objectives used to guide the development of the residential housing element of the Plan. They describe the Plan's intent to:

- (1) Provide for the housing needs of existing and future City residents.
- (2) Provide housing opportunities for residents with varied income levels and tastes that are esthetically and functionally compatible with the existing community housing stock.
- (3) Cooperate with the Housing Authority of Washington County and the Housing Division of Clackamas County to identify sites, projects and developers to provide the City's fair share of assisted housing units for low and moderate income households, and participate in the region's Housing Opportunity Plan.
- (4) Locate higher density development where it is convenient to the City's commercial core, near schools, adjacent to arterial and collector streets and, as much as possible, in areas with existing multi-family housing and provide residential opportunities in selected commercial areas through the Mixed Use Commercial Overlay District.
- (5) Provide areas that are suitable for manufactured dwelling parks and areas that are suitable for subdivisions that will accommodate manufactured homes.
- (6) Provide areas that will accommodate small-lot subdivisions.
- (7) Develop specific and enforceable design standards for multi-family developments, town-houses, manufactured homes, manufactured dwelling parks and small-lot subdivisions.
- (8) Encourage owner occupancy of multi-family developments and other housing units within the City.
- (9) Encourage subdividers and other residential developers to consider the need for solar access on residential construction sites.

(10) Provide for the raising of agricultural animals and agricultural structures in areas that are presently used for this purpose and that are not buildable due to their location in the 100-year flood plain.

(11) Require that all residential development adjacent to Expressways be buffered from the noise of such Expressways through the use of soundproofing devices such as walls, berms or distance. Density transfer to accommodate these techniques is acceptable.

(12) Encourage the development of attached housing in accordance with the RML Planning District in the area of the Norwood Expressway/Boones Ferry Road intersection.

(13) Provide truck routes for industrial traffic that provide for efficient movement of goods while protecting the quality of residential areas.

(14) Protect residential, commercial, and sensitive industrial uses from the adverse environmental impacts of adjacent industrial use.

(15) Protect adjacent land uses from noise impacts by adopting industrial noise standards.

(16) Protect the Tonquin Scablands from adverse impacts of adjacent development. This includes the main Scabland area in the vicinity of the Burlington Northern Railroad tracks which is preserved through the use of the Wetlands Protection District and the Greenway and Riverbank Protection District. This also includes other elements of the Scabland formations found farther to the east. These latter areas will be preserved on a case-by-case basis as development occurs through preservation in their natural state, allowing residential density transfer through the small lot subdivision, common wall housing, and condominium conditional use processes.

(17) Protect wooded areas identified on the Natural Features Map found in the Technical Memorandum by requiring their preservation in a natural state, by integrating the major trees into the design of the parking lots, buildings, or landscaping areas of multi-family complexes and non-residential uses, or in low density areas through the small lot, common wall, or condominium conditional use. If it is necessary to remove a portion or all of the trees, the replacement landscape features shall be subject to approval through the Architectural Review process, except for conventional single family subdivisions.



## Appendix B: Housing Policy Tools to Address Needs

**This appendix presents the information provided to the CAC in the memorandum Housing Policy Tools to Address Needs (dated May 16, 2019).**

The City of Tualatin contracted ECONorthwest to develop a Housing Needs Analysis and a Housing Strategy for Tualatin. The Housing Needs Analysis will determine whether the City of Tualatin has enough land to accommodate 20-years of population and housing growth. It will characterize housing affordability problems and identify gaps in housing affordability in Tualatin. The Housing Needs Analysis will provide the basis for an update to the City's Comprehensive Plan Housing Element, as well as development of an action plan to implement the housing policies (i.e. the Housing Strategy).

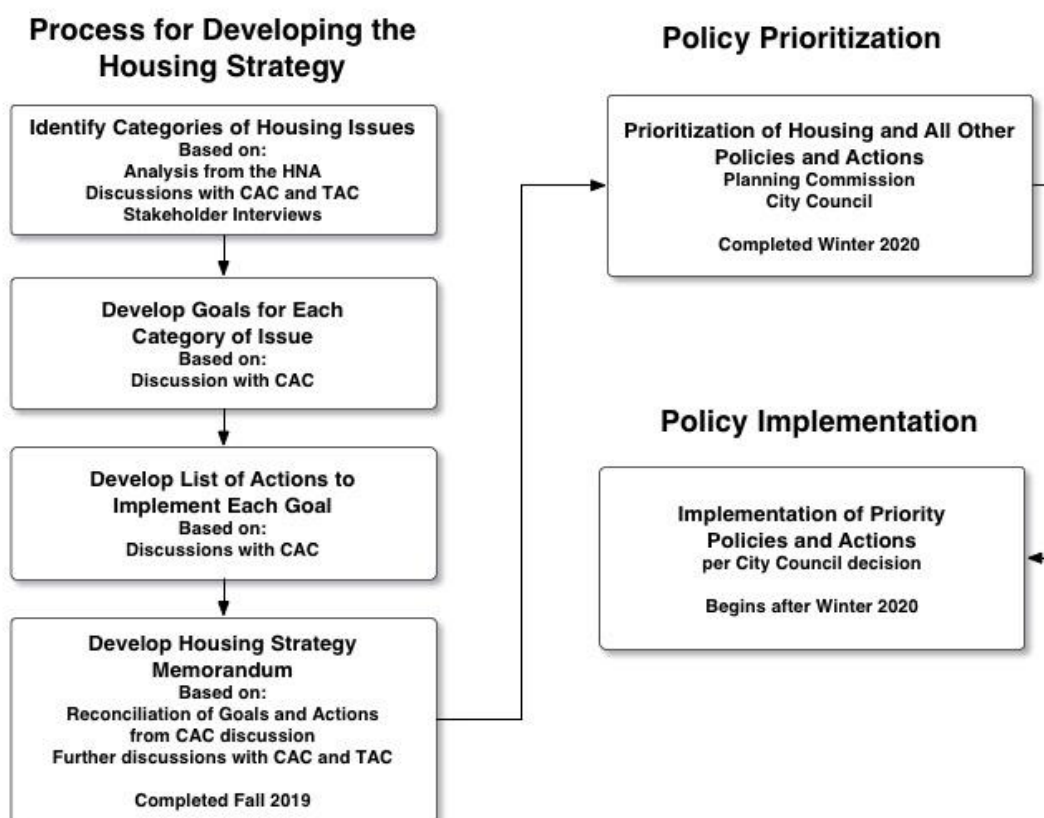
This memorandum provides a range of housing policy options for the City of Tualatin to consider as it addresses its housing needs. These policy options are commonly used by cities in Oregon and other states. Policy options are categorized as follows:

- Land Use Regulations
- Increase Housing Types
- Financial Assistance to Homeowners and Renters
- Lower Development or Operational Costs
- Funding Sources to Support Residential Development

The intention of this memorandum is to provide a toolbox of potential policies and actions that the City can use to address strategic issues. Exhibit 1 illustrates the process for developing the housing strategy and incorporating the strategy into the broader Tualatin 2040 process. Through this project, the CAC and TAC will provide feedback and recommendations that will be used to develop the Tualatin Housing Strategy. The May 23 CAC meeting will begin this process with the following steps: (1) identify categories of housing issues, (2) develop goal(s) to address each category of issue, and (3) developing a list of actions to implement each goal. At a subsequent CAC meeting, we will discuss one or more drafts of the Housing Strategy memorandum, which will document the housing issues, goals, and actions.

After the conclusion of this project, the Housing Strategy will be combined with other policies and actions and will be prioritized by the Tualatin Planning Commission and City Council. The policies and actions will be implemented per the Tualatin City Council's direction once prioritization is completed.

Exhibit 1. Process for developing and implementing the housing strategy



## Options for Housing Policy Tools

This memorandum provides the City with information about potential policies that could be implemented in Tualatin to address the City’s housing needs. Implementing some of the strategies in this memorandum may be beyond Tualatin’s current staff or financial resources.

For many of the policy tools described below, we give an approximate scale of impact. **The purpose of the scale of impact is to provide some context for whether the policy tool generally results in a little or a lot of change in the housing market.** The scale of impact depends on conditions in the City, such as other the City’s other existing (or newly implemented) housing policies, the land supply, and housing market conditions. We define the scale of impact as follows:

- A **small** impact may not directly result in development of new housing or it may result in development of a small amount of new housing, such as 1% to 3% of the needed housing (which is 10 to 30 dwelling units for Tualatin). In terms of housing affordability, a small impact may not improve housing affordability in and of itself. A policy with a small impact may be necessary but not sufficient to increase housing affordability.
- A **moderate** impact is likely to directly result in development of new housing, such as 3% to 5% of needed housing (which is 30 to 50 dwelling units for Tualatin). In terms of

housing affordability, a moderate impact may not improve housing affordability in and of itself. A policy with a moderate impact may be necessary but not sufficient to increase housing affordability.

- A **large** impact is likely to directly result in development of new housing, such as 5% to 10% (or more) of needed housing (which is 50 to 100 dwelling units for Tualatin). In terms of housing affordability, a **large** impact may improve housing affordability in and of itself. A policy with a large impact may still need to work with other policies to increase housing affordability.

## Land Use Regulations

The following policies focus on ways in which the City can modify its current land use regulations in order to increase housing affordability and available housing stock. Policies are broken into two categories: those that affect regulatory changes, and those which increase the land available for housing.

Strategy Name	Description	Scale of Impact
<b>Regulatory Changes</b>		
Administrative and Procedural Reforms	<p>Regulatory delay can be a major cost-inducing factor in development. Oregon has specific requirements for review of development applications. However, complicated projects frequently require additional analysis such as traffic impact studies, etc.</p> <p>A key consideration in these types of reforms is how to streamline the review process and still achieve the intended objectives of local development policies.</p>	<p><b>Scale of Impact - Small.</b> The level of impact on production of housing and housing affordability will be small and will depend on the changes made to the city's procedures. Streamlining procedures may be necessary but not sufficient to increase housing production on its own.</p>
Expedited / Fast-tracked Building Permit	<p>Expedite building permits for pre-approved development types or building characteristics (e.g. green buildings).</p> <p>City of Bend offers expedited review and permitting for affordable housing. Any residential or mixed-use development that receives local, state or federal affordable housing funding is eligible to receive a written decision by the Planning Department within two weeks of the date of submittal. For projects that require more complex planning review, a decision will be written or the first public hearing will be held within six weeks of the date of submittal.</p>	<p><b>Scale of Impact - Small.</b> Expedited permit processing will benefit a limited number of projects. It may be necessary but not sufficient to increase housing production on its own.</p>
Streamline Zoning Code and other Ordinances	<p>Complexity of zoning, subdivision, and other ordinances can make development more difficult, time consuming, and costly. Streamlining development regulations can result in increased development.</p> <p>As part of the streamlining process, cities may evaluate potential barriers to affordable workforce housing and multifamily housing. Potential barriers may include: height limitations, complexity of planned unit development regulations, parking requirements, and other zoning standards.</p> <p>Many of the remaining tools in this section focus on changes to the zoning code.</p>	<p><b>Scale of Impact - Small to moderate.</b> The level of impact on production of housing and housing affordability will depend on the changes made to the zoning code and other ordinances.</p>

Strategy Name	Description	Scale of Impact
Allow Small Residential Lots	<p>Small residential lots are generally less than 5,000 sq. ft. and sometimes closer to 2,000 sq. ft. This policy allows individual small lots within a subdivision. Small lots can be allowed outright in the minimum lot size and dimensions of a zone, or they could be implemented through the subdivision or planned unit development ordinances.</p> <p>This policy is intended to increase density and lower housing costs. Small-lots limit sprawl, contribute to a more efficient use of land, and promote densities that can support transit. Small lots also provide expanded housing ownership opportunities to broader income ranges and provide additional variety to available housing types.</p> <p>Cities across Oregon allow small residential lots, including many cities in the Metro area.</p>	<p><b>Scale of Impact – Small to moderate.</b> Cities have adopted minimum lot sizes as small as 2,000 sq. ft. However, it is uncommon to see entire subdivisions of lots this small. Small lots typically get mixed in with other lot sizes. This tool generally increases density and amount of single-family detached and townhouse housing in a given area, decreasing housing costs as a result of decreasing amount of land on the lot.</p>
Mandate Maximum Lot Sizes	<p>This policy places an upper bound on lot size and a lower bound on density in single-family zones. For example, a residential zone with a 6,000 sq. ft. minimum lot size might have an 8,000 sq. ft. maximum lot size yielding an effective net density range between 5.4 and 7.3 dwelling units per net acre.</p> <p>This approach ensures minimum densities in residential zones by limiting lot size. It places bounds on building at less than maximum allowable density. Maximum lot sizes can promote appropriate urban densities, efficiently use limited land resources, and reduce sprawl development.</p> <p>This tool is used by some cities but is used less frequently than mandating minimum lot sizes.</p>	<p><b>Scale of Impact—Small to moderate.</b> Mandating maximum lot size may be most appropriate in areas where the market is building at substantially lower densities than are allowed or in cities that do not have minimum densities.</p> <p>This tool generally increases density and amount of single-family detached and townhouse housing in a given area, decreasing housing costs as a result of decreasing amount of land on the lot.</p>

Strategy Name	Description	Scale of Impact
Mandate Minimum Residential Densities	<p>This policy is typically applied in single-family residential zones and places a lower bound on density. Minimum residential densities in single-family zones are typically implemented through maximum lot sizes. In multifamily zones, they are usually expressed as a minimum number of dwelling units per net acre. Such standards are typically implemented through zoning code provisions in applicable residential zones.</p> <p>This policy increases land-holding capacity. Minimum densities promote developments consistent with local comprehensive plans and growth assumptions. They reduce sprawl development, eliminate underbuilding in residential areas, and make provision of services more cost effective.</p> <p>Mandating minimum density is generally most effective in medium and high density zones where single-family detached housing is allowed. The minimum density ensures that low-density single-family housing is not built where higher-density multifamily housing could be built.</p>	<p><b>Scale of Impact—Small to moderate.</b> Increasing minimum densities and ensuring clear urban conversion plans may have a small to moderate impact depending on the observed amount of “underbuild” and the minimum density standard.</p> <p>For cities that allow single-family detached housing in high density zones, this policy can result in a moderate or larger impact.</p>
Increase Allowable Residential Densities	<p>This approach seeks to increase holding capacity by increasing allowable density in residential zones. It gives developers the option of building to higher densities. This approach would be implemented through the local zoning or development codes. This strategy is most commonly applied to multifamily residential zones.</p> <p>For cities with maximum densities, consider removing maximum allowable densities. This change may be most relevant.</p> <p>Higher densities increase residential landholding capacity. Higher densities, where appropriate, provide more housing, a greater variety of housing options, and a more efficient use of scarce land resources. Higher densities also reduce sprawl development and make the provision of services more cost effective.</p>	<p><b>Scale of Impact—Small to moderate.</b> This tool can be most effective in increasing densities where very low density is currently allowed or in areas where a city wants to encourage higher density development.</p> <p>This tool generally increases density and amount of single-family detached and townhouse housing in a given area, decreasing housing costs as a result of decreasing amount of land on the lot.</p>

Strategy Name	Description	Scale of Impact
Allow Clustered Residential Development	<p>Clustering allows developers to increase density on portions of a site, while preserving other areas of the site. Clustering is a tool most commonly used to preserve natural areas or avoid natural hazards during development. It uses characteristics of the site as a primary consideration in determining building footprints, access, etc. Clustering is typically processed during the site review phase of development review.</p>	<p><b>Scale of Impact—Moderate.</b> Clustering can increase density, however, if other areas of the site that could otherwise be developed are not developed, the scale of impact can be reduced.</p>
Reduced Parking Requirements	<p>Jurisdictions can reduce or eliminate minimum off-street parking requirements, as well as provide flexibility in meeting parking requirements. Reducing parking requirements positively impact development of any type of housing, from single-family detached to multifamily housing.</p> <p>Reduced parking requirements are most frequently used in conjunction of development of subsidized affordable housing, but cities like Portland have reduced or eliminated parking requirements for market-based multifamily housing in specific circumstances.</p> <p>City of Bend offers parking reductions for affordable housing and transit proximity. Parking for affordable housing units is 1 space per unit regardless of size, compared to 1 space per studio or 1 bedroom unit, 1.5 spaces per 2-bedroom unit, and 2 spaces per 3- or more bedroom unit for market-rate multifamily development or 2 spaces per market rate detached dwelling unit. Affordable housing units must meet the same eligibility criteria as for other City of Bend affordable housing incentives</p> <p>City of Portland offers parking exceptions for affordable housing and sites adjacent to transit. The City of Portland allows housing developments that meet the inclusionary zoning requirements to reduce parking requirements to zero if located near frequent transit service, and to exclude the affordable housing units from parking requirements for developments located further from frequent transit service. The City also allows market rate housing developments located near frequent transit service to provide little or no parking, depending on the number of units in the development.</p>	<p><b>Scale of Impact—Small to moderate.</b></p> <p>The City could require the developer to prove the need and public benefit or reducing parking requirements to increase housing affordability.</p> <p>Reducing parking requirements can have a moderate to large impact on housing affordability if little or no parking is required.</p>

Strategy Name	Description	Scale of Impact
Reduce Street Width Standards	<p>This policy is intended to reduce land used for streets and slow down traffic. Street standards are typically described in development and/or subdivision ordinances. Reduced street width standards are most commonly applied on local streets in residential zones. This strategy could be applied to alleys, when required, to ensure that alleys are relatively narrow to reduce development and maintenance costs.</p> <p>Narrower streets make more land available to housing and economic-based development. Narrower streets can also reduce long-term street maintenance costs.</p>	<p><b>Scale of Impact—Small.</b> This policy is most effective in cities that require relatively wide streets.</p>
Preserving Existing Housing Supply	<p>Housing preservation ordinances typically condition the demolition or replacement of certain housing types on the replacement of such housing elsewhere, fees in lieu of replacement, or payment for relocation expenses of existing tenants. Preservation of existing housing may focus on preservation of smaller, more affordable housing. Approaches include:</p> <ul style="list-style-type: none"> <li>• Housing preservation ordinances</li> <li>• Housing replacement ordinances</li> <li>• Manufactured home preservation</li> <li>• Single-room-occupancy ordinances</li> <li>• Regulating demolitions</li> </ul>	<p><b>Scale of Impact—Small to moderate.</b> Preserving small existing housing can make a difference in the availability of affordable housing in a city but it is limited by the existing stock housing, especially smaller, more affordable housing. Cities with older housing stock are more likely to benefit from this policy.</p>



Strategy Name	Description	Scale of Impact
Inclusionary Zoning	<p>Inclusionary zoning policies tie development approval to, or provide regulatory incentives for, the provision of low- and moderate-income housing as part of a proposed development. Mandatory inclusionary zoning requires developers to provide a certain percentage of low-income housing. Incentive-based inclusionary zoning provides density or other types of incentives.</p> <p>The price of low-income housing passed on to purchasers of market-rate housing. Inclusionary zoning impedes the "filtering" process where residents purchase new housing, freeing existing housing for lower-income residents.</p> <p>Oregon's inclusionary zoning laws apply to structures with 20 or more multifamily units, with inclusion of units that are affordable at 80% of the median family income of the city.</p> <p>The City of Portland has implemented an inclusionary zoning program. While Portland's inclusionary zoning program is resulting in production of affordable multifamily units, there is considerable discussion and disagreement about the impact of number of multifamily units being built and potential changes in the location of units.</p>	<p><b>Scale of Impact—Small to moderate.</b> Inclusionary zoning has recently been made legal in Oregon. The scale of impact would depend on the inclusionary zoning policies adopted by the city.</p>

<b>Increasing Land Available for Housing</b>		
<p>Re-designate or rezone land for housing</p>	<p>The types of land rezoned for housing are vacant or partially vacant low-density residential and employment land rezoned to multifamily or mixed use. In rezoning land, it is important to choose land in a compatible location, such as land that can be a buffer between an established neighborhood and other denser uses or land adjacent to existing commercial uses. When rezoning employment land, it is best to select land with limited employment capacity (i.e., smaller parcels) in areas where multifamily housing would be compatible (i.e., along transit corridors or in employment centers that would benefit from new housing). This policy change increases opportunity for comparatively affordable multifamily housing and provides opportunities for mixing residential and other compatible uses.</p> <p>Cities across Oregon frequently re-zone and re-designate land to address deficits of land for new housing.</p>	<p><b>Scale of Impact - Small to large.</b> Scale of impact depends on the amount and location of land rezoned and the densities allowed on the rezoned land.</p>
<p>Encourage multifamily residential development in commercial zones</p>	<p>This tool seeks to encourage denser multifamily housing as part of mixed-use projects in commercial zones. Such policies lower or eliminate barriers to residential development in commercial or mixed-use zones. They include: eliminating requirements for non-residential uses in commercial zones (e.g., requirements for ground floor retail) or requiring minimum residential densities. This policy can increase opportunities for multifamily development on commercial or mixed-use zones or increase the density of that development.</p> <p>Cities across Oregon frequently encourage multifamily housing development in commercial zones, either as stand-alone residential buildings or as mixed-use buildings.</p>	<p><b>Scale of Impact – Small to moderate.</b> Many cities already encourage multifamily housing in commercial zones. Further encouraging multifamily housing in commercial zones would likely have a small impact, as multifamily housing is allowed in many of the commercial areas where it would be desirable. Unless it is publicly subsidized, mixed-use development generally results in relatively costly housing because ground floor commercial development is relatively expensive.</p>

<p>Transfer or Purchase of Development Rights</p>	<p>This policy is intended to move development from sensitive areas to more appropriate areas. Development rights are transferred to “receiving zones” and can be traded and can increase overall densities. This policy is usually implemented through a subsection of the zoning code and identifies both sending zones (zones where decreased densities are desirable) and receiving zones (zones where increased densities are allowed).</p> <p>Transfer of development rights is done less frequently in Oregon, as cities generally zone land for higher density housing where they would like it to occur. This policy is frequently used by cities outside of Oregon.</p>	<p><b>Scale of Impact - Small to moderate.</b> Actual impact will depend on the extent to which the policy is used. TDRs may have little impact on overall densities since overall density is not changed; rather it is moved around. TDRs can be used to encourage higher densities in selected areas.</p>
<p>Provide Density Bonuses to Developers</p>	<p>The local government allows developers to build housing at densities higher than are usually allowed by the underlying zoning. Density bonuses are commonly used as a tool to encourage greater housing density in desired areas, provided certain requirements are met. This strategy is generally implemented through provisions of the local zoning code and is allowed in appropriate residential zones.</p> <p>Bonus densities can also be used to encourage development of low-income or workforce affordable housing. An affordable housing bonus would allow for more housing units to be built than allowed by zoning if the proposed project provides a certain number of affordable units.</p> <p>City of Bend offers affordable housing density and height bonuses. Qualifying affordable housing projects are eligible for a 10-foot building height bonus for multifamily housing when affordable housing units are gained and for a density bonus. The density increase is based on the percentage of affordable housing units within the proposed development: if 10% of the units are affordable, the maximum density is 110% of the standard maximum density. The maximum density bonus is 50% above the base density. Qualifying projects must be affordable to households at or below 60% of the AMI for rental housing and at or below 80% of the AMI for ownership housing, and require development agreements and restrictions to ensure continued affordability.</p> <p>Ashland has four different density bonuses, one of which is for development of affordable housing at higher densities and another for energy-efficient housing. Affordable housing projects meeting eligibility requirements (including rental housing affordable to households at or below 60% of AMI or ownership housing affordable to households at or below 80% of AMI for a minimum of 30 years) receive a density bonus</p>	<p><b>Scale of Impact – Small to moderate.</b> Cities provide density bonuses on a case-by-case basis, which results in a small and sometimes moderate impact in many cities. Density bonuses can have a greater impact on housing affordability when the bonus increases the number of affordable units developed.</p>

	<p>of two units for each affordable housing unit provided, up to a maximum of a 35% increase in density.</p> <p>Kirkland Washington offers density bonuses for duplex, triplex, and cottage homes. Cottage homes (limited to 1,500 square feet of floor area) and two- and three-unit homes (up to 1,000 square feet of floor area average per unit) are allowed at double the density of detached dwelling units in the underlying zone.</p>	
--	---	--

### Increase Housing Types

The following policies focus on ways in which the City can increase the types of housing available in order to increase housing affordability. Policies focus on increasing housing density or the number of residents within existing City lots.

Strategy Name	Description	Scale of Impact
Allow Duplexes, Cottage housing, Townhomes, Row Houses, and Tri- and Quad-Plexes in low density zones	<p>Allowing these housing types can increase overall density of residential development and may encourage a higher percentage of multifamily housing types. This approach would be implemented through the local zoning or development codes and would list these housing types as outright allowable uses in appropriate residential zones. These housing types provide additional affordable housing options and allow more residential units than would be achieved by detached homes alone.</p> <p>House Bill 2001 may require cities to allow some of these housing types in single-family zones.</p>	<p><b>Scale of Impact – Small to moderate.</b> Allowing these types of housing in more zoning districts may provide relatively few number of new, relatively affordable, housing opportunities.</p>
Allow Cottage housing, Tri- and Quad-Plexes Townhomes, Row Houses, Stacked Townhouses, Cottage Courts, Duplex/Townhouse Courts, & Garden Apartments in	<p>Allowing these housing types can increase overall density of residential development and may encourage a higher percentage of multifamily housing types. This approach would be implemented through the local zoning or development codes and would list these housing types as outright allowable uses in appropriate residential zones. These housing types provide additional affordable housing options and allow more residential units than would be achieved by detached homes alone.</p>	<p><b>Scale of Impact – Small to Large.</b> Allowing these types of housing in more zoning districts may provide up to a large number of new, relatively affordable, housing opportunities. The scale of impact will depend, in part, on the amount of vacant or redevelopable land in medium density zones, as well as the types</p>

Strategy Name	Description	Scale of Impact
medium density zones		of housing newly allowed in the medium density zone.
Allow Stacked Townhouses, Garden Apartments and larger-scale Apartments in high density zones	Allowing these housing types can increase overall density of residential development and may encourage a higher percentage of multifamily housing types. This approach would be implemented through the local zoning or development codes and would list these housing types as outright allowable uses in appropriate residential zones. These housing types provide additional affordable housing options and allow more residential units than would be achieved by detached homes alone.	<b>Scale of Impact – Small to Large.</b> Allowing these types of housing in more zoning districts may provide up to a large number of new, relatively affordable, housing opportunities. The scale of impact will depend, in part, on the amount of vacant or redevelopable land in high density zones, as well as the types of housing newly allowed in the high density zone.
Allow Live-Work housing or Mixed-use housing in commercial zones	Allowing these housing types can increase overall density of residential development and may encourage a higher percentage of multifamily housing types. This approach would be implemented through the local zoning or development codes and would list these housing types as outright allowable uses in appropriate residential zones. These housing types provide additional affordable housing options and allow more residential units than would be achieved by detached homes alone.	<b>Scale of Impact – Small to Large.</b> Allowing these types of housing in more zoning districts may provide up to a large number of new, relatively affordable, housing opportunities.
Remove barriers to Development of Accessory Dwelling Units (ADUs) in single-family zones	As of July 1, 2018, ORS 197.312 requires cities to allow at least one ADU for each detached single-family dwelling in areas zoned for detached single-family dwellings.  Jurisdictions can make development of ADUs more likely by limiting restrictive standards and procedures, such as reducing systems development charges for ADUs, reducing or eliminating parking requirements, or allowing ADUs regardless of where the primary dwelling is owner-occupied.	<b>Scale of Impact - Small.</b> Oregon law recently changed to require cities to allow ADUs.

Strategy Name	Description	Scale of Impact
Allow small or “tiny” homes	<p>“Tiny” homes are typically dwellings that are 500 square feet or smaller. Some tiny houses are as small as 100 to 150 square feet. They include stand-alone units or very small multifamily units.</p> <p>Tiny homes can be sited in a variety of ways: locating them in RV parks (they are similar in many respects to Park Model RVs), tiny home subdivisions, or allowing them as accessory dwelling units.</p> <p>Smaller homes allow for smaller lots, increasing land use efficiency. They provide opportunities for affordable housing, especially for homeowners.</p> <p>Portland and Eugene allow tiny homes as temporary shelter for people experiencing homelessness.</p>	<p><b>Scale of Impact - Small:</b> Scale of impact depends on regulation of tiny homes, where they are allowed, and market demand for tiny homes.</p>

## Lower Development or Operational Costs

The following policies focus on ways in which the City and other entities involved in development can provide financial assistance to lower development or operational costs in a city in order to increase housing affordability and available housing stock.

Strategy Name	Description	Scale of Impact
<b>Programs or policies to lower the cost of development</b>		
Parcel assembly	<p>Parcel assembly involves the city’s ability to purchase lands for the purpose of land aggregation or site assembly. It can directly address the issues related to limited multifamily lands being available in appropriate locations (e.g., near arterials and commercial services). Typical goals of parcel assembly programs are: (1) to provide sites for rental apartments in appropriate locations close to services and (2) to reduce the cost of developing multifamily rental units</p> <p>Parcel assembly can lower the cost of multifamily development because the City is able to purchase land in strategic locations over time. Parcel assembly is often associated with development of affordable housing (affordable to households with income below 60% of MFI), where the City partners with nonprofit affordable housing developers.</p> <p>Parcel assembly can be critically important role for cities to kick start quality affordable housing and work force housing projects that can be positive catalysts too for market rate development.</p>	<p><b>Scale of Impact - Small to large.</b> Parcel assembly is most likely to have an effect on a localized area, providing a few opportunities for new multifamily housing development over time.</p>

Strategy Name	Description	Scale of Impact
Land Banking	<p>Land banks support housing development by reducing or eliminating land cost from development, with the goal of increasing the affordability of housing. They can take several forms. Many are administered by a non-profit or non-governmental entity with a mission of managing a portfolio of properties to support affordable housing development over many years or decades. Ideally, a land bank is 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 non-profits or sometimes 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.</p> <p>Land banks are purposed for short-term ownership of lands. Lands acquired are often vacant, blighted, or environmentally-contaminated. Land banks may also acquire lands with title defects or of which derelict structures sit. Lands are eventually transferred to a new owner for reuse and redevelopment.</p>	<p><b>Scale of Impact - Small to large.</b> A land bank will have the biggest impact on production of low- and moderate-income affordable housing. Considering how difficult it is to build this type of affordable housing and the level of need for affordable housing, a land trust could increase nonprofits' capacity to build affordable housing.</p>
Land Trusts	<p>A land trust is typically a nonprofit organization that owns land and sells or leases the housing on the land to income-qualified buyers. Because the land is not included in the housing price for tenants / buyers, land trusts can achieve below-market pricing. Land trusts are most commonly used as a method for supporting affordable home ownership goals.</p> <p>Land trusts are purposed for long-term stewardship of lands and buildings. Lands / buildings acquired may have need for remediation or redevelopment. Lands / buildings may have also been acquired to preserve affordability, prevent deferred maintenance, or protect against foreclosure</p> <p>Proud Ground (Portland Metro Area) was founded in 1999 and has grown into one of the largest community land trusts in the country. The organization focuses on affordable homeownership and controls ground leases associated with 270 homes in Multnomah, Washington, Clackamas, and Clark County.</p>	<p><b>Scale of Impact - Small to large.</b> A land trust will have the biggest impact on production of low- and moderate-income affordable housing. Considering how difficult it is to build this type of affordable housing and the level of need for affordable housing, a land trust could increase nonprofits' capacity to build affordable housing.</p>

Strategy Name	Description	Scale of Impact
Public Land Disposition	<p>The public sector sometimes controls land that has been acquired with resources that enable it to dispose of that land for private and/or nonprofit redevelopment. Land acquired with funding sources such as tax increment, EB-5, or through federal resources such as CDBG or HUD Section 108 can be sold or leased at below market rates for various projects to help achieve redevelopment objectives. This increases development feasibility by reducing development costs and gives the public sector leverage to achieve its goals via a development agreement process with the developer. Funding can come from Tax Increment, CDBG/HUD 108, or EB-5.</p> <p>Cities across Oregon use publicly land to support affordable and market-rate of housing development. In some cases, municipalities put surplus public land into land banks or land trusts.</p> <p>Tri-Met is evaluating re-use of construction staging sites for future affordable housing and/or transit-orient development sites.</p> <p>Cottage Grove is working with the school district to discuss and plan for use of surplus school district land for future housing development.</p>	<p><b>Scale of Impact – Small to moderate.</b> Depends on whether the City has surplus land that would be appropriate for future housing development.</p>



Strategy Name	Description	Scale of Impact
<p>Reduced / Waived Building Permit fee, Planning fees, or SDCs</p>	<p>Programs that reduce various development fees as an incentive to induce qualifying types of development or building features. There are a number of avenues to seek reduced or waived fees. For example, stormwater improvements can be made through the Commercial Stormwater Fee Reduction. There are commonly used tools, often implemented in conjunction with development agreements or other development negotiation processes.</p> <p>City of Portland offers SDC exemptions for affordable housing. Portland’s SDC Exemption Program exempts developers of qualifying affordable housing projects from paying SDCs levied by the City of Portland for transportation, water, parks and environmental services. Eligible rental projects must serve households earning at or below 60% of the AMI for a 60-year period. Portland also offers SDC waivers for development of ADUs.</p> <p>City of McMinnville offers SDC exemptions and reduced permit fees for affordable housing. Building and planning permit fees for new or remodel housing construction projects are reduced by 50% for eligible projects and SDCs for transportation, wastewater and parks are exempted at 100%. Reductions/exemptions are prorated for mixed use or mixed-income developments. The property must be utilized for housing for low-income persons for at least 10 years or the SDCs must be paid to the city.</p>	<p><b>Scale of Impact - Small.</b></p>
<p>SDC Financing Credits</p>	<p>May help to offset an SDC charge, which is a one-time fee that is issued when there is new development or a change in use.</p> <p>SDC financing enables developers to stretch their SDC payment over time, thereby reducing upfront costs. Alternately, credits allow developers to make necessary improvements to the site in lieu of paying SDCs. Note that the City can control its own SDCs, but often small cities manage them on behalf of other jurisdictions including the County and special districts. SDCs are granted when the project makes lasting improvements, such as improving roads, reducing number of trips, create or improve parks or recreational centers, and permanently removing water services.</p>	<p><b>Scale of Impact – Small to moderate.</b> The City may consider changes in SDCs to allow financing but the City would want to ensure that the impact should be spread-out and non-negatively impact one entity.</p>

Strategy Name	Description	Scale of Impact
Sole Source SDCs	Retains SDCs paid by developers within a limited geographic area that directly benefits from new development, rather than being available for use city-wide. This enables SDC-eligible improvements within the area that generates those funds to keep them for these improvements. Improvements within smaller areas can enhance the catalytic and redevelopment value of the area. This tool can also be blended with other resources such as LIDs and Urban Renewal (Tax Increment Financing). Funding can come from an SDC fund or general fund. In some cases, there may be no financial impact. The housing can come in the form of student, low-income, or workforce housing.	<b>Scale of Impact – Small to moderate.</b> Depends on how the tool is implemented and whether it is used with other tools, such as LIDs or Urban Renewal.
Fees or Other Dedicated Revenue	Directs user fees into an enterprise fund that provides dedicated revenue to fund specific projects. Examples of those types of funds can include parking revenue funds, stormwater/sewer funds, street funds, etc. The City could also use this program to raise private sector funds for a district parking garage wherein the City could facilitate a program allowing developers to pay fees-in-lieu or “parking credits” that developers would purchase from the City for access “entitlement” into the shared supply. The shared supply could meet initial parking need when the development comes online while also maintaining the flexibility to adjust to parking need over time as elasticity in the demand patterns develop in the district and influences like alternative modes are accounted for. Funding can come from residents, businesses, and developers. Also, these fees or revenues allow for new revenue streams into the City.	

Strategy Name	Description	Scale of Impact
Reimbursement District	<p>A Reimbursement District is a cost sharing mechanism, typically Initiated by a developer. The purpose is to provide a reimbursement method to the developer of an infrastructure improvement, through fees paid by property owners at the time the property benefits from the improvement. A developer applies to create a Reimbursement District by demonstrating benefit to properties beyond their own. In addition, the size of the improvement must be measurably greater than would otherwise be ordinarily required for the improvement</p> <p>Eligible Reimbursement District projects typically include (but are not limited to) construction or connections of a sewer, water, storm water or street improvements. Applications typically include: a fee sufficient to cover the cost of administrative review, a description of the project, properties that would be impacted, and a detailed methodology and calculation of how the estimated costs would be reimbursed by payments from benefitted properties over a specified timeframe. A report from the City Engineer is generated in review of the submitted application. After a public hearing process, the council will approve, reject or modify the proposal. The approval of a Reimbursement District results in a resolution and distribution of notice among benefitted properties before construction can begin.</p> <p>Benefitted properties must pay the Reimbursement Fee when they make a physical connection to the improvement (or in the case of a sewer project, when the benefitted property creates an impervious surface that drains into the public sewer) within the Reimbursement District Area. Reimbursement fees are collected by the City and are distributed to the developer for the duration of the Reimbursement District, which are typically 10-15 years.</p> <p>Paid by benefitted properties at the time the property benefits from the improvement, typically at connection to the sewer, water or storm drain system.</p>	Scale of Impact – Small to moderate.
Linkage Fees	<p>Linkage fees are charges on new development, usually commercial and / or industrial development only, which can be used to fund affordable housing. To implement them, a city must undertake a nexus study that identifies a legal connection between new jobs housed in the developments, the wages those jobs will pay, and the availability of housing affordable to those employees.</p> <ul style="list-style-type: none"> <li>• Can be used for acquisition and rehabilitation of existing affordable units.</li> <li>• Can be used for new construction.</li> </ul>	Scale of Impact – Small to moderate.

Strategy Name	Description	Scale of Impact
<b>Tax abatement programs that decrease operational costs by decreasing property taxes</b>		
Vertical Housing Tax Abatement (Locally Enabled and Managed)	<p>The 2017 Legislature passed legislation moving the administration of Vertical Housing Program from Oregon Housing and Community Services (OHCS) to the local City and County beginning Oct 6th, 2017. OHCS no longer administers this program.</p> <p>The legislation subsidizes "mixed-use" projects to encourage dense development or redevelopment by providing a partial property tax exemption on increased property 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 percent 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 percent of area is median income or below).</p>	<p><b>Scale of Impact – Small to moderate.</b> The design of the tax abatement program will impact whether and how many developers use the tax abatement, which will affect the scale of the impact.</p>

<p>Multiple-Unit Limited Tax Exemption Program (Locally Enabled and Managed)</p>	<p>Through the multifamily tax exemption, a jurisdiction can incent diverse housing options in urban centers lacking in housing choices or workforce housing units. Through a competitive process, multi-unit projects can receive a property tax exemption for up to ten-years on structural improvements to the property. Though the state enables the program, each City has an opportunity to shape the program to achieve its goals by controlling the geography of where the exemption is available, application process and fees, program requirements, criteria (return on investment, sustainability, inclusion of community space, percentage affordable or workforce housing, etc.), and program cap. The City can select projects on a case-by-case basis through a competitive process.</p> <p>The passing of HB 2377 - Multiunit Rental Housing Tax Exemption allows cities and counties to create a property tax exemption for newly rehabilitated or newly constructed multi-unit rental housing within their boundaries depending on the number of units made available to low-income households, for up to 10 consecutive years. The bill was crafted to strengthen the connection to affordability by requiring cities and counties to establish a schedule in which the number of years an exemption is provided increases directly with the percentage of units rented to households with an annual income at or below 120 percent of MFI, and at monthly rates that are affordable to such households. While not specifically referenced in the measure, ORS 308.701 defines “Multi-unit rental housing” as: “(a) residential property consisting of four or more dwelling units” and; “does not include assisted living facilities.”</p> <p>All new multifamily units that are built or renovated that offer rent below 120% of AMI are potentially eligible for this tax exemption. In a city with an AMI of \$55,000 (common outside of Portland), that's rent of \$1,650 per month or less. The tax exemption is for all taxing districts which is administered by the City. Due to this, smaller jurisdictions may have more trouble managing this program. Local taxing jurisdictions that agree to participate—cities, school districts, counties, etc.</p> <p>The City of Eugene offers a ten-year Multi-Unit Property Tax Exemption (MUPTE) for projects in its eastern downtown core. Eugene’s criteria for granting MUPTE include: Project must provide 5 or more units of housing (not including student housing), development must meet minimum density standards, development must comply with minimum green building requirements, a portion of construction and other contracting requirements must</p>	<p><b>Scale of Impact – Small to moderate.</b> The design of the tax abatement program will impact whether and how many developers use the tax abatement, which will affect the scale of the impact.</p>
--	---	--

Strategy Name	Description	Scale of Impact
	<p>be through local business, the development must provide 30% of the units affordable at 100% of AMI or pay a fee of 10% of the value of the tax abatement toward supporting moderate income housing development, demonstrate that the project would not be financially feasible without the exemption by providing 10-year pro forma with and without MUPTTE and comply with other criteria.</p> <p>The City of Salem’s Multi-Unit Housing Tax Incentive Program (MUHTIP) was adopted in 2012 to spur the construction of “transit supportive”<sup>9</sup> multi-unit housing in the city’s downtown core. In order to qualify for the exemption, projects must consist of at least two dwelling units, be located in the city’s “core area,” and include at least one public benefit.</p>	
<p>Nonprofit Corporation Low Income Housing Tax Exemption</p> <p>and</p> <p>Low-Income Rental Housing Tax Exemption</p>	<p>Note: These are two separate tax exemptions available under statute (ORS 307.515 to 307.523 / ORS 307.540 to 307.548). They are grouped together for their similarities (but differences are noted).</p> <p>Land and improvement tax exemption used to reduce operating costs for regulated affordable housing affordable at 60% AMI or below. Requires the City to adopt standards and guidelines for applications and enforcement mechanisms.</p> <p>The low-income rental housing program exemption lasts 20 years. The nonprofit corporation low-income housing program must be applied for every year but can continue as long as the property meets the criteria. Rents must reflect the full value of the property tax abatement and City can add additional criteria.</p> <p>There is no requirement that construction must be complete prior to application. Programs both work well in tandem with other incentives, such as land banking.</p>	<p><b>Scale of Impact – Small to moderate.</b> The exemption reduces operating costs, meaning it is a tool more useful to property owners of affordable housing projects. Developers, who do not own and operate their own projects, may be less inclined to use the program.</p>

<sup>9</sup> City of Salem, “Multi Unit Housing Tax Incentive Program,” <https://www.cityofsalem.net/Pages/multi-unit-housing-tax-incentive-program.aspx>.

## Funding Sources to Support Residential Development

The following policies focus on ways to pay for the costs of implementing the affordable housing programs and infrastructure development.

Strategy Name	Description	Scale of Impact
Urban Renewal / Tax Increment Finance (TIF)	<p>Tax increment finance revenues are generated by the increase in total assessed value in an urban renewal district from the time the district is first established. As property values increase in the district, the increase in total property taxes (i.e., City, County, school portions) is used to pay off the bonds. When the bonds are paid off, the entire valuation is returned to the general property tax rolls. TIFs defer property tax accumulation by the City and County until the urban renewal district expires or pays off bonds. Over the long term (most districts are established for a period of 20 or more years), the district could produce significant revenues for capital projects. Urban renewal funds can be invested in the form of low-interest loans and/or grants for a variety of capital investments:</p> <ul style="list-style-type: none"> <li>• Redevelopment projects, such as mixed-use or infill housing developments</li> <li>• Economic development strategies, such as capital improvement loans for small or startup businesses which can be linked to family-wage jobs</li> <li>• Streetscape improvements, including new lighting, trees, and sidewalks</li> <li>• Land assembly for public as well as private re-use</li> <li>• Transportation enhancements, including intersection improvements</li> <li>• Historic preservation projects</li> <li>• Parks and open spaces</li> </ul> <p>Urban renewal is a commonly used tool to support housing development in cities across Oregon.</p>	<p><b>Scale of Impact – Moderate to Large.</b> Urban Renewal funding is a flexible tool that allows cities to develop essential infrastructure or provides funding for programs that lower the costs of housing development (such as SDC reductions or low interest loan programs). Portland used Urban Renewal to catalyze redevelopment across the City, including the Pearl District and South Waterfront.</p>

<p>Construction Excise Tax (CET)</p>	<p>Funds land use planning throughout the region by taxing construction permits. CET is a tax assessed on construction permits issued by local cities and counties. The tax is assessed as a percent of the value of the improvements for which a permit is sought, unless the project is exempted from the tax. 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. CETs may be residential only, commercial only, or residential and commercial. If the City were to adopt a CET, the tax would be up to 1% of the permit value on residential construction and an uncapped rate on commercial and industrial construction. The allowed uses for CET funding are defined by the state statute. The City may retain 4% of funds to cover administrative costs. The funds remaining must be allocated as follows, if the City uses a residential CET:</p> <ul style="list-style-type: none"> <li>• 50% must be used for developer incentives (e.g. fee and SDC waivers, tax abatements, etc.)</li> <li>• 35% may be used flexibly for affordable housing programs, as defined by the jurisdiction.</li> <li>• 15% flows to Oregon Housing and Community Services for homeowner programs.</li> </ul> <p>If the City implements a CET on commercial or industrial uses, 50% of the funds must be used for allowed developer incentives and the remaining 50% are unrestricted. The rate may exceed 1% if levied on commercial or industrial uses. The City of Portland's CET went into effect in 2016. It levies a 1% CET on residential, commercial, and industrial development valued at \$100,000 or more, with all revenues going toward affordable housing. The revenues pay for production of housing at or below 60% AMI, developer incentives for inclusionary zoning, along with state homeownership programs.</p> <p>City of Bend adopted a CET of 0.3% on residential, commercial, and industrial development in 2006, with revenues dedicated to loans to fund developments by profit and nonprofit affordable housing developers. The fee has raised \$11 million as of 2016, allowing the City to lend money to fund 615 units. The fund has leveraged \$63 million in state and federal funding and \$14 million in equity.</p> <p>The City of Milwaukie adopted a CET on commercial, residential, and industrial development in November of 2017. The City exempted deed-restricted affordable</p>	<p><b>Scale of Impact – Depends on the amount of funding available.</b></p>
--------------------------------------	--	---



	<p>housing, ADUs, and improvements less than \$100,000 from paying the CET. The adopting ordinance allocates funds as required by state statutes, specifying that flexible funds from the commercial improvements will be used 50% toward housing available to those making up to 120% of MFI, and 50% for economic development programs in areas with sub-area plans (such as Downtown and Riverfront, and the City's urban renewal areas).</p>	
<p>General Fund and General Obligation (GO) Bonds</p>	<p>Allows funding for a project that is not dependent on revenue from the project to back the bond.</p> <p>City can use general fund monies on hand or can issue bonds backed by the full faith and credit of the city to pay for desired public improvements.</p> <p>Property taxes are increased to pay back the GO bonds.</p> <p>City of Portland passed \$258 million bond for affordable housing in 2016. The goal of the bond is to build or preserve up to 1,300 units in the next five to seven years. The city issued a request for information to solicit interest in acquiring properties or land under the affordable housing bond. The city is looking for opportunities to acquire existing properties of 20 or more units, or vacant land that is appropriately zoned for 20+ housing units, and is looking for both traditional and nontraditional development opportunities.</p>	<p><b>Scale of Impact – Moderate to large.</b> GO Bonds can be used to develop essential infrastructure or provides funding for programs that lower the costs of housing development (such as SDC reductions or low interest loan programs).</p>
<p>Local Improvement District (LID)</p>	<p>Enables a group of property owners to share the cost of a project or infrastructural improvement.</p> <p>A special assessment district where property owners are assessed a fee to pay for capital improvements, such as streetscape enhancements, underground utilities, or shared open space. For residential property, the estimated assessment cannot exceed the pre-improvement value of the property based on assessor records.</p> <p>An ordinance must be passed through a public hearing process which must be supported by a majority of affected property owners. Part of this process includes an estimation of the improvement costs and the portion of those costs in which property owners will be responsible to pay for. The public hearing process allows for LIDs to be challenged by property owners.</p> <p>The City collects the funds and regardless if the actual cost is greater than the estimated cost (on which the assessment was based), the City may make a deficit assessment for the additional cost, which would be prorated among all benefitted properties. Another public hearing would be held, in the event that an additional assessment were placed property owners (due to underestimation).</p>	<p><b>Scale of Impact – Depends on the amount of funding available and Bonding capacity.</b></p>

<p>General Fund Grants or Loans</p>	<p>A city can use general fund or tax increment dollars to directly invest in a specific affordable housing projects. These grants or loans can serve as gap funding to improve development feasibility. There are several options for using general fund grants or loans, including the potential for bonds to generate upfront revenue that is repaid over time, as recently approved in the City of Portland. Another option is to use general fund dollars to contribute to other programs that are successfully operating, such as non-profit land trusts or even other government agencies that have the administrative capacity to maintain compliance requirements over time, using intergovernmental agreements.</p>	<p><b>Scale of Impact – Depends on the amount of funding available.</b></p>
<p>Transient Lodging Tax (TLT)</p>	<p>Generates revenue by primarily taxing tourists and guests using temporary lodging services. Taxes for temporary lodging at hotels, motels, campgrounds, and other temporary lodgings. Oregon has a statewide TLT and cities and counties can also charge a local TLT subject to certain limitations. The statutes specify that 70% must be used for tourism promotion or tourism related facilities and 30% is unrestricted in use, and there cannot be a reduction of the total percent of room tax. The state tax is specified at 1.8%; local government tax rates vary as local governments set the rate for their jurisdiction by ordinance. Cities and counties may impose taxes on transient lodging. Alternatively, some cities have an agreement for the county to impose the tax and cities share in a percent of the revenue.</p>	<p><b>Scale of Impact – Small.</b> The amount of funding from TLT is likely to be relatively small, given that only 30% of TLT funds have unrestricted use.</p>
<p>CDBG</p>	<p>The Community Development Block Grants program is a flexible program that provides annual grants on a formula basis to both local governments and States. Grants are awarded on a 1, 2, or 3-year period. It is required that at least 70% of the CDGB funds are used for activities that benefit low- and moderate- income. Additionally, each activity must address any threats to health or welfare in the community (for which other funding is unavailable). These funds can be used for acquisition and rehabilitation of existing affordable units, as well as new construction that prioritizes community development efforts.</p>	<p><b>Scale of Impact – Depends on the amount of funding available.</b></p>



August 4, 2020

Honorable Mayor and Members of the City Council  
c/o Steve Koper, Planning Manager  
City of Tualatin Planning Division  
18880 SW Martinazzi Avenue  
Tualatin, OR 97062-7092

**RE: Revision to the Basalt Creek RML Plan Text Amendment Application (PTA-20-0003)**

Dear Mayor Bubenik and Members of the City Council:

Lennar Northwest, Inc. and Venture Properties, Inc. are co-applicants for the Basalt Creek Medium Low-Density Residential (RML) Plan Text Amendment (PTA-20-0003) land use application. After discussion with the Tualatin Planning Commission and review of the Staff Report, the Applicants understand that attached housing is an important component of Tualatin's future housing supply.

In recognition of this, the Applicants have provided a revision to the proposed Text Amendment application to accommodate a minimum of 15% attached housing to match the findings of the 2019 Housing Needs Analysis (HNA). Amended code language is attached to this letter for your reference.

With this additional revision, the proposed Text Amendment provides for attached housing, diverse lot sizes for detached homes, and removes regulatory barriers to housing – all goals outlined in Tualatin | 2040.

We look forward to discussing this matter with the City Council on August 10, 2020.

Sincerely,

**AKS ENGINEERING & FORESTRY, LLC**

A handwritten signature in blue ink that reads 'Mimi Doukas'.

Mimi Doukas, AICP, RLA  
12965 SW Herman Road, Suite 100  
Tualatin, OR 97062  
(503) 563-6151 | mimid@aks-eng.com

Attachment: Revised Code Amendment

c. David Force and Michael Anders, Lennar Northwest, Inc  
Kelly Ritz, Venture Properties, Inc

### TDC 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	C/P	Limited to single-family dwellings in a small lot subdivision, with conditional use permit, subject to TDC 36.410. <b>Permitted for a maximum of 85% of the proposed dwelling units within the Basalt Creek Planning Area subject to TDC 41.330.</b>
Accessory Dwelling Unit	P	Subject to TDC 34.600.
Duplex		
Townhouse (or Rowhouse)	P	See TDC definition in 31.060.
Multi-Family Structure	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.

### TDC 41.300. - Development Standards.

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).

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

STANDARD	REQUIREMENT	LIMITATIONS AND CODE REFERENCES
<b>MAXIMUM DENSITY</b>		
Household Living Uses	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	
<b>MINIMUM LOT SIZE</b>		
Townhouse (or Rowhouse)	1,400 square feet	
Multi-Family Structure and Duplex		
• Development on Less than One Acre	10,000 square feet	For up to two units, plus an additional 4,195 square feet for each unit exceeding two.

• Development on More than One Acre	4,356 square feet per unit	
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
<b>MINIMUM AVERAGE LOT WIDTH</b>		
Townhouse (or Rowhouse)	14 feet	
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.
<b>MINIMUM SETBACKS</b>		
Front Setback		Minimum setback to a garage door must be 20 feet.
• 1 story structure	20 feet	
• 1.5 story structure	25 feet	
• 2 story structure	30 feet	
• 2.5 story structure	35 feet	
• Townhouse (or Rowhouse)	0-20 feet	As determined through Architectural Review process.
Side and Rear Setback		Where living spaces face a side yard, the minimum setback must be ten feet
• 1 story structure	5 feet	
• 1.5 story structure	7 feet	
• 2 story structure	10 feet	
• 2.5 story structure	12 feet	
Corner Lots	—	On corner lots, the setback is the same as the front yard setback on any side facing a street other than an alley.
Minimum Distance Between Buildings within One Development	10 feet	For Townhouses, determined through the Architectural Review process
Parking and Vehicle Circulation Areas	10 feet	For Townhouses, determined through the Architectural Review process
Conditional Uses	—	As determined through Architectural Review process. No minimum setback must be greater than 50 feet
Any Yard Area Adjacent to Basalt Creek Parkway	50 feet	
<b>MAXIMUM STRUCTURE HEIGHT</b>		
All Uses	35 feet	May be increased to a maximum of 50 feet with a conditional use permit, if all setbacks are not less than 1½ times the height of the building.

<b>MAXIMUM LOT COVERAGE</b>		
Townhouse (or Rowhouse)	90%	
All Other Permitted Uses	40%	
Conditional Uses	45%	

### **TDC 41.330. - Development Standards.**

Development standards for Household Living Uses in the RML zone within the Basalt Creek Planning Area are listed in Table 41-4. The standards of TDC 41.330 apply to RML-zoned properties within the Basalt Creek Planning Area with project sites which are greater than 15 acres in size. Additional standards may apply to some uses and situations, see TDC 41.310.

**Table 41-4  
Development Standards in the RML Zone within the Basalt Creek Planning Area**

<b>STANDARD</b>	<b>REQUIREMENT</b>	<b>LIMITATIONS AND CODE REFERENCES</b>
<b>MAXIMUM DENSITY</b>		
Household Living Uses	10 units per acre	Up to a maximum of 85% of proposed dwelling units may be detached single-family homes.
<b>MINIMUM AVERAGE LOT SIZE</b>		
Single Family Lot	3,000 square feet	
<b>MINIMUM AVERAGE LOT WIDTH</b>		
Single Family Detached Lot	26 feet	
Townhouse (or Rowhouse)	14 feet	
Flag Lots	—	Must be sufficient to comply with minimum access requirements of TDC 73C.
<b>MINIMUM SETBACKS</b>		
Front Setback		
• building	10 feet	
• garage	20 feet	
Side Setback	5 feet	
Rear Setback	10 feet	
Street side setback	10 feet	
Any Yard Area Adjacent to Basalt Creek Parkway	50 feet	
<b>MAXIMUM STRUCTURE HEIGHT</b>		
All Uses	35 feet	May be increased to a maximum of 50 feet with a conditional use permit, if all setbacks are not less than 1½ times the height of the building.
<b>MAXIMUM LOT COVERAGE</b>		
Single Family Detached Lot	55%	
Townhouse (or Rowhouse)	90%	

**From:** Meg Boden Alvey <doc.meg.2009@gmail.com>  
**Sent:** Saturday, August 1, 2020 2:19 PM  
**To:** Tabitha Boschetti  
**Subject:** Norwood development

Hello,

Thank you for your work collaborating with developers on the Norwood road new housing development. I have significant concerns about the plan for the project.

I would ask that the development keep a significant number more of the trees to preserve green spaces for air quality, normalize temperatures, preserve wildlife, and improve the residents quality of life.

I would ask that the development include multiple green space plots that preserve at least five of the evergreen trees within each plot.

It is irresponsible of Tualatin to approve a plan that involves demolishing 25 acres of forest. It is also not considerate of traffic planning to have 160+ residences with only four access points in and out of the neighborhood. This plan also neglects the well being and mental health if the residents.

With the decline in mental health in general, it is only wise to keep green spaces, which are proven to benefit mental health. Most compelling is research that indicates children and teens who have access to green spaces have lower rates of clinical mental health issues. Green spaces are also shown to improve residents attachment to their neighborhood and community, both things that Tualatin values. Lastly, research is very clear that denser cities with minimal trees and green spaces average several degrees warmer. Increasing these temps will increase home owners utilities and further burden our utility services.

See below for multiple article references

Thank you for holding developers accountable to these matters of great importance for our community.

Thank you,

Dr. Meg Boden Alvey, Psy.D.

<https://www.sciencedirect.com/science/article/abs/pii/S1618866711000963>

<https://www.nrpa.org/our-work/Three-Pillars/health-wellness/ParksandHealth/fact-sheets/parks-improved-mental-health-quality-life/>

<https://bmcp psychiatry.biomedcentral.com/articles/10.1186/s12888-018-1926-1>

<https://www.pnas.org/content/116/11/5188>



**From:** Dan Cobb <dancobb@live.com>  
**Sent:** Tuesday, August 4, 2020 7:45 PM  
**To:** Tabitha Boschetti  
**Subject:** My written requests to the City of Tualatin Regarding Norwood Development.

Hi Tabitha.

Thanks much for your time! I appreciate your insight over the phone.

This correspondence regards the very large, high-density housing development projects currently in planning for the areas south of Norwood Road and down to the dirt road marked as Green Hill Road. My primary concern are the 24 wooded acres south of Norwood Rd. Current zoning apparently calls for 10 housing units per-acre, which most people would consider to be high-density housing. A recent meeting I attended indicated this would provide 142 homes (regardless of whether these are SFR or multi-family). My concerns are as follows, in no specific order.

Request 1 – Control density and traffic for livability and property values: 142 units, two adults = 300 cars at least. With both adults commuting to and from work, and with non-work trips after work, this development will result in at least 700 – 750 vehicle trips per-day. Norwood Rd and Boones Ferry Rd will not support such a high number of added daily trips. Many drivers will head north past Tualatin High School and Byrom and Tualatin Elementary schools, or up 65th Ave. Both roadways are already severely congested during normal “rush hours”, which together total several hours daily. Commuting for citizens living in the area will become a nightmare. (COVID-19 will pass and we will all head back to work.) The intersection at Norwood Rd and Boones Ferry Rd is hazardous already due to the partial blind spot on the hill and the fencing at that corner. Seven hundred new vehicle trips will result in numerous accidents. This development, with density as planned, will harm existing property values.

I request that the City reduce the number of Norwood development housing units, by 30% at least, and that Green Hill Road, intersecting Boones Ferry Road south of Horizon Community Church, be built to completion BEFORE this Norwood development is built, so that safe, adequate access for those new residents is provided. Attempting to remedy transportation infrastructure failures after developments are built, isn't “planning”.

Request 2 – Provide a development setback for livability : The 24 acre parcel hosts thousands, possibly up to 60,000 Evergreen trees. The loss of this area, with so many trees and the wildlife habitat provided, is a deep shame for the community. Cedar and fir trees line both sides of Norwood Road and make the area, with the walking path, a treasure for many area residents. I request (and hundreds of residents back this) that the City create an 80-foot setback from the edge of Norwood Road to any development, so that mature trees within the setback can be retained. Horizon Community Church did exactly this, for which we residents are eternally grateful. This setback will benefit all current and future area residents.

Request 3 – Retain certain trees for livability: I request that the development be designed to keep as many mature trees as possible, in small islands, and not leave all tree removal decisions to the builder, but require city review for large trees. This will contribute greatly to livability in the development and break up the heat-island effect that this and the larger residential and commercial developments to the south will otherwise create.

Request 4: Route construction traffic for safety: Thousands of trips by heavy construction vehicles and logging trucks weighing up to 40 tons will be made to-and-from this site for several months, possibly up to a year. These vehicles will present a glaring and serious safety hazard for pedestrians and drivers, especially if they are allowed to pass Horizon Community Church and the three public schools to the north – Tualatin High School, Byrom Elementary, and Tualatin Elementary. Because teenage drivers and young children are so impulsive, and 40-ton trucks cannot stop on a dime, very serious and possibly lethal accidents are highly likely. I ask that all heavy vehicle construction traffic be banned from travelling on Norwood Rd and Boones Ferry Road north of the site. As a much safer alternative, I request that Green Hill Road be built sufficiently to be used as the primary access road to the site for these vehicles.

Best Regards,  
Dan Cobb

**From:** robi kelly kurth <robikelly@earthlink.net>  
**Sent:** Tuesday, August 4, 2020 10:51 PM  
**To:** Tabitha Boschetti  
**Cc:** robikelly@earthlink.net  
**Subject:** Re: Norwood Annexation Testimony - August 4th

Robinson & Kelly Kurth

Dear Tabitha,

Through various information sources I have your name as a contact for feedback from Tualatin residents regarding the Norwood Annexation project.

I am a resident of Tualatin in the Byrom CIO area. I have lived in Tualatin since 2011 and been a member of the Byrom community for much longer since I previously taught at Byrom Elementary since 1998. I have seen Tualatin in 1998 and witnessed the many land developments and acquisitions since then.

Here are some comments or questions for consideration:

1. Tualatin needs to maintain aesthetic standards for development:

I know some forms of growth and expansion are inevitable. However, they should be regulated with some long-term strategy. If we don't protect or provide natural areas, our communities become grid developments and sprawl, lacking much of what draws people in the first place to thoughtful and aesthetic planned community developments (e.g., Villebois).

2. Provide valuable open spaces within developments:

I would hope that all developments and housing projects provide plenty of valuable open space. Look at the important variety and benefit that areas such as Ibach Park, Cook Park, or Graham Oaks (in Wilsonville) provide.

3. Environmental Impact studies:

Has there been Environmental Impact Studies? Was there public input? Are these studies publicized now? Who is assisting with wildlife relocation?

4. Limit the number of units for numerous reasons - sound, traffic, pollution, congestion, and habitat loss. Will the city or the developer be building a tall sound wall along I-5 for this house development? Just walk along the streets closest to I-5 in Byrom and you will hear the very loud decibels of highway traffic. Sound pollution will be an issue to any homes built in this area.

5. Many Byrom citizens are raising the issue of nature corridors along Norwood to preserve the mature trees here and Islands of mature trees within this new development. We ask you to further consider the long term shade of mature trees in this area of Tualatin for climate impact. The Tree City reputation of Tualatin is not being supported without consideration of Islands of mature trees preserved within this new development and tree preservation along Norwood Road.

Thank you for working on this important, large project. Think of the long term.

Robinson & Kelly Kurth

Residents: 21828 SW Blackfoot Drive, Tualatin, OR

email: [robikelly@earthlink.net](mailto:robikelly@earthlink.net)

cell: 503-826-2526

**From:** robi kelly kurth <robikelly@earthlink.net>  
**Sent:** Wednesday, August 5, 2020 3:36 PM  
**To:** Tabitha Boschetti  
**Cc:** robikelly@earthlink.net  
**Subject:** RE: Norwood Annexations - Testimony / Public Comments

Thank you so much for providing all this information. =)

Yes, please include my comments / concerns also in the Plan Text Amendment case, not just the Annexation case. Thank you.

I will use your reference to links and contact the City Council for more information regarding codes and hopefully using this situation to press for some important updates and improvements to the existing codes.

This is the last you should hear from me.... today. =)

I really appreciate your rapid feedback.

- Robinson

-----Original Message-----

From: Tabitha Boschetti  
Sent: Aug 5, 2020 1:49 PM  
To: robi & kelly kurth  
Subject: RE: Norwood Annexations - Testimony / Public Comments

Robinson,

Sorry I wasn't clear; I have included your comments in the case record for ANN 20-0003. They will be included in the packet that goes to City Council, so I will be sharing your comments with City Council in that manner. The hearing for ANN 20-0003 is scheduled for August 24, 2020, and the Council packet will be published online on August 17<sup>th</sup>.

For clarity, only ANN 20-0003 is an Annexation case. The Plan Text Amendment PTA 20-0003 is not an Annexation case. "Annexation" refers changing a jurisdictional boundary; it is the act of incorporating a smaller territory into a larger territory. The scope of the Plan Text Amendment (PTA 20-0003) now being considered is limited to the private applicant's proposal to change the standards that would apply to their future development only. It would change lot sizes and lot coverage to accommodate single-family homes on smaller lots, though without changing the maximum allowed density. If you would like to also include your comments for the Plan Text Amendment case, PTA 20-0003, please let me know. If yes, I can include them in that case record too and forward them to City Council for the scheduled hearing on August 10, 2020.

If you would like to see an update to city code with regard to noise, air quality, traffic, green space, open space, and other issues, I would encourage to also consider contacting City Council directly. City Council can direct staff to consider code changes in response to broader

community concerns. You can more information here:  
<https://www.tualatinoregon.gov/citycouncil/meet-your-council>.

Sincerely,

**Tabitha Boschetti, AICP**  
503.691.3029 | [tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)

---

**From:** robi kelly kurth <[robikelly@earthlink.net](mailto:robikelly@earthlink.net)>  
**Sent:** Wednesday, August 5, 2020 12:24 PM  
**To:** Tabitha Boschetti <[tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)>  
**Cc:** [robikelly@earthlink.net](mailto:robikelly@earthlink.net)  
**Subject:** RE: Norwood Annexations - Testimony / Public Comments

Hi Tabitha,

I appreciate your reply and information, thank you.

The links you provide will be helpful as these projects are reviewed and as the development begins. Another reason we contacted you was because we heard that public comments have time limits during hearings/meetings so that submitting comments via email ahead of time to the appropriate city personnel is better assurance that public concerns will be considered. I hope this is true / accurate. Are you this person ? =). Is there another person or contact to submit our concerns ? I have another neighbor with concerns / warnings about the air quality for dwellings so close to I-5. I will let them know about the two annexations you list below. Thanks.

In the very least, I would hope the city of Tualatin (and other municipalities) update their codes and regulations to align with higher standards for livability, impact on surrounding residents, and quality of life issues (noise, air quality, traffic, green spaces, open spaces, etc.). I was relieved to see your comment that the Tualatin Planning Commission plans to deny the first filing amendment for this annexation project.

Thanks again for your time and information.

Let me know if there are alternate people or contacts to whom I should submit these concerns if it is not you.

Enjoy the summer weather.

With regards,

Robinson Kurth

---

-----Original Message-----  
From: Tabitha Boschetti  
Sent: Aug 5, 2020 12:21 PM

**From:** Scott Held <srheld56@gmail.com>  
**Sent:** Wednesday, August 5, 2020 6:15 PM  
**To:** Tabitha Boschetti  
**Subject:** Norwood Development

Dear City Council Members:

I am not as eloquent or kind as Dan Cobb's words are been below.

The greed, lack of empathy and concern towards the residents of the immediate and surrounding area, traffic congestion, safety concerns, environmental considerations are absolutely shameful!

Chances are the people on the City Council making these decisions probably do not even live any where near the proposed site. Most likely anyone writing you or attending the public hearings will not be heard. Their concerns will fall on deaf ears as you have already decided to move forward. Can't help but believe there is payola, grifting involved amongst the City Council. I am jaded and have zero confidence in local government to make decisions based on the public interest. It's all about what's in it for ME!

Maybe a mall will be built in your neighborhoods, and down all the trees, drive all the animals out of your area.

Do the right thing and listen to your constituents, perhaps the public wants more traffic congestion, pollution, noise and fewer trees.....Great, the people have spoken, but my guess is the council will vote to do whatever lines their pockets, and promotes their careers. Just remember the old saying "Karma is a Bitch!"

This correspondence regards the very large, high-density housing development projects currently in planning for the areas south of Norwood Road and down to the dirt road marked as Green Hill Road. My primary concern are the 24 wooded acres south of Norwood Rd. Current zoning apparently calls for 10 housing units per-acre, which most people would consider to be high-density housing. A recent meeting I attended indicated this would provide 142 homes (regardless of whether these are SFR or multi-family). My concerns are as follows, in no specific order. Request 1 – Control density and traffic for livability and property values: 142 units, two adults = 300 cars at least. With both adults commuting to and from work, and with non-work trips after work, this development will result in at least 700 – 750 vehicle trips per-day. Norwood Rd and Boones Ferry Rd will not support such a high number of added daily trips. Many drivers will head north past Tualatin High School and Byrom and Tualatin Elementary schools, or up 65th Ave. Both roadways are already severely congested during normal "rush hours", which together total several hours daily. Commuting for citizens living in the area will become a nightmare. (COVID-19 will pass and we will all head back to work.) The intersection at Norwood Rd and Boones Ferry Rd is hazardous already due to the partial blind spot on the hill and the fencing at that corner. Seven hundred new vehicle trips will result in numerous accidents. This development, with density as planned, will harm existing property values. I request that the City reduce the number of Norwood development housing units, by 30% at least, and that Green Hill Road, intersecting Boones Ferry Road south of Horizon Community Church, be built to completion BEFORE this Norwood development is built, so that safe, adequate access for those

new residents is provided. Attempting to remedy transportation infrastructure failures after developments are built, isn't "planning". Request 2 – Provide a development setback for livability : The 24 acre parcel hosts thousands, possibly up to 60,000 Evergreen trees. The clear cut of this area, with so many trees and the wildlife habitat provided, is a profound loss. Cedar and fir trees line both sides of Norwood Road and make the area, with the walking path, a treasure for many area residents. I request (and hundreds of residents back this) that the City create an 80-foot setback from the edge of Norwood Road to any development, so that mature trees within the setback can be retained. Horizon Community Church did exactly this, for which we residents are eternally grateful. This setback will benefit all current and future area residents. Request 3 – Retain certain trees for livability: I request that the development be designed to keep as many mature trees as possible, in small islands, and not leave all tree removal decisions to the builder, but require city review for large trees. This will contribute greatly to livability in the development and break up the heat-island effect that this and the larger residential and commercial developments to the south will otherwise create. Request 4: Route construction traffic for safety: Thousands of trips by heavy construction vehicles and logging trucks weighing up to 40 tons will be made to-and-from this site for several months, possibly up to a year. These vehicles will present a glaring and serious safety hazard for pedestrians and drivers, especially if they are allowed to pass Horizon Community Church and the three public schools to the north – Tualatin High School, Byrom Elementary, and Tualatin Elementary. Because teenage drivers and young children are so impulsive, and 40-ton trucks cannot stop on a dime, very serious and possibly lethal accidents are highly likely. I ask that all heavy vehicle construction traffic be banned from traveling on Norwood Rd and Boones Ferry Rd north of the site. As a much safer alternative, I request that Green Hill Road be built sufficiently to be used as the primary access road to the site for these vehicles.

I am not as eloquent or kind as Don's words are been below. The greed, lack of empathy and concern towards the residents of the immediate and surrounding area, traffic congestion, safety concerns, environmental considerations are absolutely shameful!

Chances are the people on the City Council making these decisions probably do not even live any where near the proposed site. Most likely anyone writing you or attending the public hearings will not be heard. Their concerns will fall on deaf ears as you have already decided to move forward. Cant help but believe there is payolla, grifting involved amongst the City Council. I am jaded and have zero confidence in local government to make decisions based on the public interest. It's all about what's in it for ME!

Maybe a mall will be built in your neighborhoods, and down all the trees, drive all the animals out of your area.

Do the right thing and listen to your constituents, perhaps the public wants more traffic congestion, pollution, noise and fewer trees.....Great, the people have spoken, but my guess is the council will vote to do whatever lines their pockets, and promotes their careers. Just remember the old saying "Karma is a Bitch!"

Scott Held  
Wilsonville



**From:** Beth Z <mightymadge1@gmail.com>  
**Sent:** Friday, August 7, 2020 11:52 AM  
**To:** Tabitha Boschetti  
**Subject:** Norwood development

**Follow Up Flag:** Follow up  
**Flag Status:** Completed

I wholeheartedly agree with the many concerns of the traffic, environment, and livability that are obvious to local Tualatin citizens with the proposed high density development under planning. Higher density does not make for better safety, livability, or value either now or in the future.

Mr. Cobb has made some very good points and suggestions, among other neighbors, via email and Nextdoor posts.

Please start and support a healthy trend of good stewardship of the land and community we live in. High density housing may be the current trend, but it is not a good solution. Farmland and forests are being lost which can never be regained, and living on top of each other has never worked well long term.

Let's create and support a healthy and happy community for the longterm. The time to establish that is now.

Beth Zbinden

**From:** Gregory Brashear <brasgr54@aol.com>  
**Sent:** Monday, August 10, 2020 4:52 PM  
**To:** Tabitha Boschetti  
**Subject:** Norwood Development Project

**Follow Up Flag:** Follow up  
**Flag Status:** Flagged

I'm curious how many of you live in this area. I have been here for 22 years, and have seen a "massive" traffic increase in this area. I live on 22935 SW Mandan DR, on the corner of Mandan and Vermillion. When there is any kind of problem on I-5, every bails at the N Wilsonville exit, North or Southbound. They all head for 65th, or Boones Ferry Rd. They both load-up pretty fast. When Boones Ferry gets busy, drivers then cut down Vermillion to get to Martinazzi, which leads to the Tualatin exit. They all drive at excessive speeds, because they are running late. During the school year, I've seen multiple near-misses of children going to the bus stop. I have been almost run over several times, just crossing the street to walk my dog. Drivers use excessive speeds at all times. The bus drivers struggle to make their rounds now. Adding more drivers is going to cause accidents and a possible death or injury. If Tualatin doesn't plan on adding more lanes on Boones Ferry or 65th. we're all in trouble. You're talking a minimum of 400 cars on a daily basis. Where are they all going to go? They will bail into the residential areas, and you have schools all-over the place.

And how is anybody going to make a left on Boones Ferry, "Ever" ? Ditto 65th Northbound.

Poor Horizon Christians will never get to class on time.

The Tualatin Ramp is going to be a nightmare.

I'm sorry, this plan make "no sense Period.

I sincerely doubt that the homeowners in this area will ever get any quiet time. That's too bad.

Just like this plan !!!!!!!!!!!!!!!!!!!!!

Greg Brashear

**From:** Kimberley Chadwick <k-chadwick@comcast.net>  
**Sent:** Monday, August 10, 2020 1:44 PM  
**To:** Tabitha Boschetti  
**Subject:** Kim Chadwick- 8882 SW Stono Drive- City council New house concerns AUG 10th

Tabatha,

Here are my notes for today's discussion. Also, I just left you a voice message and can't seem to find where on your website I need to pre-register.

I click on the link and it takes me directly to the zoom conference...not to a Pre-registration site. Can you help me with this?

Thanks. Kim

This is the letter I sent to Nichole (link on the website to submit comments/letters to)  
Kim

I have lived off of 89th and Stono Drive for the last 21 years. Although I knew the greenbelt on Norwood Road would someday modify I never dreamt it would be such a radical decision and thus far appearing as a thoughtless process.

First concern:

The idea of a four way intersection (or cross section for this new development on 89th -OR- Vermillion will create nothing but bottleneck on the entire Norwood, 89th and Vermillion St roads.

The Norwood Rd over pass is narrower than the actual road and with the T at the end of the street would create nothing less than a parking lot during business travel times.

I REALLY believe there should be a second access from Boones Ferry into this development to create ease with the Norwood congestion.

Second concern:

The idea of losing the trees that had provided home to wildlife along with great sound barrier for the neighborhood a nice natural foreground to this new neighborhood (along with our existing neighborhood) would seem like a priority for our community.

Walking paths, Green areas, etc...

**WE NEED TO KEEP SOME OF THESE TREES!**

Best of Health,

Kim Chadwick

Protocol for Life, NOW Foods  
Sanesco For Health

Given the current worldwide condition, Protocol is experiencing shipping delays. Please be patient with us as we work overtime to get everything out as soon as possible.

p: 503-734-6394  
f: 855-833-9012



Undeliverable: SW Norwood Annexation

Fri 7/10/2020 11:56 AM

📎 1 attachments (24 KB)  
SW Norwood Annexation ;

**Delivery has failed to these recipients or groups:**

[mimid@aks-eng-.com](mailto:mimid@aks-eng-.com) (mimid@aks-eng-.com)

I tried to email you, but delivery failed. So I printed off what I had written and will send to you via mail. These are issues that concern me about your proposed massive housing development.

Julie Cooper

CITY OF TUALATIN  
RECEIVED  
AUG 10 2020  
COMMUNITY DEVELOPMENT  
PLANNING DIVISION

SW Norwood Annexation

Fri 7/10/2020 11:55 AM

CITY OF TUALATIN  
RECEIVED  
AUG 10 2020  
COMMUNITY DEVELOPMENT  
PLANNING DIVISION

Mimi:

I live in Pennington Heights and am very concerned about this housing project and what could be a nightmare traffic increase on both Norwood and Boone's Ferry Roads. Along with the destruction of a wonderful forest,

Are you putting in your plans to build entrance and exit ramps on either side of the Norwood bridge to access and exit off the I 5 freeway? Seems like that would be absolutely necessary to prevent the bottlenecks that could be caused by the immense traffic that will be caused by your project. Also, cutting down all those trees is going to significantly increase traffic noise from the freeway into our neighborhood.

Would appreciate an answer as I have been unable to do the Zoom meetings.

Julie Cooper

Juldujour@hotmail.com

Sent from my iPhone

**From:** Jim Delmore <delmorejim@yahoo.com>  
**Sent:** Monday, August 10, 2020 4:15 PM  
**To:** Tabitha Boschetti; Nicole J. Morris  
**Subject:** Fwd:

Mayor Bubenik,

I wish to comment on the proposed text amendment being heard by Council this evening. I am a 16-year resident of Tualatin and am concerned about the city's shortage of new housing accessible in price and type to both new and existing residents.

My understanding of the proposed text amendment is that it pertains only to parcels zoned RML over 15 acres in size in the newly-annexed Basalt Creek Plan. A property of this size in an expansion area needs to have a wide variety of housing types (both detached and attached) that is attainable to buyers with varied income levels. To make this happen, the code needs the flexibility that this text amendment proposal offers. The current code, unfortunately simply does not allow this degree of flexibility. I think it would be a missed opportunity to not support this proposal.

Thank you for the considering my opinion.

Jim Delmore

10300 SW Coquille Dr.

Tualatin, OR. 97062



August 10, 2020

Planning Commission  
18880 SW Martinazzi Avenue  
Tualatin, OR 97062-7092

**RE: File No. PTA 20-00031 –Modifications to RML Standards In Basalt Creek Planning Area**

Dear Commissioners:

This letter is submitted jointly by Housing Land Advocates (HLA) and the Fair Housing Council of Oregon (FHCO). Both HLA and FHCO are non-profit organizations that advocate for land use policies and practices that ensure an adequate and appropriate supply of affordable housing for all Oregonians. FHCO's interest relate to a jurisdiction's obligation to affirmatively further fair housing.

As you know, all amendments to the City's Comprehensive Plan and Zoning map must comply with the Statewide Planning Goals ORS 197.175(2)(a). We commend the Planning Commission and staff for its excellent Goal 10 findings, and appropriate recommendation of denial of the amendment, contained within the Staff report in the above matter. For an amendment to be approved, the Goal 10 findings must demonstrate that the changes do not leave the City with less than adequate residential land supplies in the types, locations, and affordability ranges affected. *See Mulford v. Town of Lakeview*, 36 Or LUBA 715, 731 (1999) (rezoning residential land for industrial uses); *Gresham v. Fairview*, 3 Or LUBA 219 (same); see also, *Home Builders Assn. of Lane Cty. v. City of Eugene*, 41 Or LUBA 370, 422 (2002) (subjecting Goal 10 inventories to tree and waterway protection zones of indefinite quantities and locations). By directly quoting the Tualatin 2019 Housing Needs Analysis (HNA), City planning staff expertly illustrated that this requirement is not met in this case.

*"...in order to meet the need for a broader range of housing types with a wider range of price points, the City would need to increase the amount of single-family attached housing. 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/ " (Exhibit 5, Page 92). The proposed amendments would impact roughly 58 of the 69 buildable acres of RML zoned land in the Basalt Creek area, which would challenge this goal."*

Further, while not contained in the staff report, approval of PTA 20-00031 would significantly hamper Tualatin's ability to meet its requirements in regards to OAR 660-007-0030, the so called Metro 50/50 rule. While the future housing balance is predicted to be in compliance by the 2019 HNA, this conclusion is based on the 69 acres of RML zoned land in the Basalt Creek area,

**1221 SW Yamhill Street, Portland, Oregon 97205**





58 acres of which would be affected, remaining in the RML category. This calls into question whether the City could remain compliant with the 50-50 rule.

Consistent with the City's planning department, HLA and FHCO urge the Planning Commission to deny approval of Planning Department File Number PTA 20-00031. Thank you for your consideration. Please provide written notice of your decision to, FHCO, c/o Louise Dix, at 1221 SW Yamhill Street, #305, Portland, OR 97205 and HLA, c/o Jennifer Bragar, at 121 SW Morrison Street, Suite 1850, Portland, OR 97204. Please feel free to email Louise Dix at [ldix@fhco.org](mailto:ldix@fhco.org) or reach her by phone at (541) 951-0667.

Thank you for your consideration.

A handwritten signature in black ink that reads "Louise Dix".

Louise Dix  
AFFH Specialist  
Fair Housing Council of Oregon

/s/ Jennifer Bragar

Jennifer Bragar  
President  
Housing Land Advocates

cc: Kevin Young ([kevin.young@state.or.us](mailto:kevin.young@state.or.us))

**From:** John Howorth <john.howorth@3j-consulting.com>  
**Sent:** Monday, August 10, 2020 4:29 PM  
**To:** Nicole J. Morris  
**Cc:** Tabitha Boschetti  
**Subject:** Text Amendment 20-0003 - In Favor

Mayor and City Council Members,

I would like to write in support of the Text Amendment being proposed to you for several reasons and I will be brief.

1. A more diverse neighborhood is created with architecturally different housing.
2. A more inclusive neighborhood, by providing a larger range of home pricing based on property and house size.
3. A better use of land as the availability to divide the property more efficiently.
4. The proposal does not change the overall density.

As a former Architectural Review board member and a current citizen of Tualatin of 14 years, I would like to stress the need for flexibility in housing and this proposal would do just that.

Respectfully,

**John Howorth, PE** | President - Principal Engineer | **3J Consulting**

9600 SW Nimbus Ave, Suite 100 | Beaverton, OR 97008

O: 503.946.9365 x.201 | C: 503.577.8176

[john.howorth@3j-consulting.com](mailto:john.howorth@3j-consulting.com)

Connect with us: [Website](#) | [LinkedIn](#) | [Facebook](#) | [Instagram](#)

**CIVIL ENGINEERING** | **WATER RESOURCES** | **COMMUNITY PLANNING**

*Named one of the **100 Best Companies** to work for in Oregon!*

**From:** Misty Kjemperud <mistykjemperud@gmail.com>  
**Sent:** Monday, August 10, 2020 2:59 PM  
**To:** Tabitha Boschetti  
**Subject:** Norwood development meeting comments for tonights meeting

My concern is for the additional traffic that will be joining the already congested Boones Ferry. I live on Blake Street between Martinazzi and Boones Ferry and have had multiple issues with entering onto and exiting off of Boones Ferry at various times of the day, mainly in the afternoon rush hour window of 3:00 to 6:00. You can tell when traffic on I-5, which is pretty much everyday, at a stop because everyone exits and takes Boones Ferry or 65<sup>th</sup>. Add to that, the H.S. and Byrom School traffic and it's basically gridlock mornings and afternoons.

I know that we need more housing, but we need to desperately improve the traffic in this area first.

Regards,

Misty Kjemperud

9029 SW Blake Street

Tualatin, OR 97062

503-970-1101

--

Misty Kjemperud  
Real Estate Broker  
503-970-1101  
Misty@househoppin.com  
www.househoppin.com



**Envision**  
**Northwest Homes**

*Delivering Dreams with Exceptional Service*

**From:** Cindy Michael <clmichael@gmail.com>  
**Sent:** Monday, August 10, 2020 9:57 AM  
**To:** Tabitha Boschetti  
**Subject:** Norwood Housing Development

Dear Ms. Boschetti,

I first want to thank you for your service to our community. My husband and I appreciate all that give of their time and energy into helping Tualatin to be a most wonderful place to live.

I just want to express our opinion about the new development and especially the beautiful stand of trees involved. When the proposed development was first discussed, I understood that it was to be where the clearing off Boones Ferry is located. We were not happy considering the amount of traffic that would be added to this already busy street. But as my husband expressed, people need a place to live and land had to be cleared for our development (we live on Blackfoot Drive off Martinazzi). But we had no knowledge of the second phase with plans to remove the trees that give a barrier to the freeway. We are a tree city and as such, put a high value on the quality of life that trees provide. Especially along a major freeway, trees do much to counter pollution. They provide a visual calm and beauty that we love most about Oregon. I would ask that you would protect this area by either enforcing a limit to the amount of trees removed or by denying part 2 of the development altogether.

Thank you for your kind attention,  
Cindy and Virgil Michael

**From:** Kendra Nell <kendranell11@gmail.com>  
**Sent:** Sunday, August 9, 2020 12:24 PM  
**To:** Tabitha Boschetti  
**Subject:** Norwood Housing Development

Hello,

I am writing to express my concern with the new housing development that is in discussion to occur off of Norwood Rd. Our house is located on 8842 SW Stono Dr. which means our backyard is directly across from where it will be put in. We have MANY concerns, but I will focus my letter on trees and traffic.

From our backyard, we enjoy the trees and the wildlife it brings. We have seen bald eagles, deer, coyotes, etc. who live amongst these trees, on numerous occasions, and I worry about their habitat being obliterated when thousands of trees are cut down... Aside from the obvious negative impact on wildlife, these mature trees block I5 noise and pollution to our neighborhood. I am BEGGING for the trees along Norwood road to be preserved, as they bring so much physical beauty and numerous other benefits to this area. Horizon Church was able to save them, and this development/city should also be willing to accommodate. Removing all of the trees behind our house would negatively impact us directly, so much so that we have considered moving if this happens. Especially considering the impact of road traffic on Norwood road, which will literally ruin our small street.

It is no secret that Tualatin has a SEVERE traffic problem. Adding hundreds of houses BEFORE there are any improvements/additions to the roads is absolutely insane. Turning off of Norwood Rd onto Boones Ferry Road is already completely gridlocked in both directions during the 5:00-7:00 rush hours, and mornings (especially when school is in session). Adding a significant amount of homes BEFORE any of the current traffic issues are resolved just does not make any sense.

I understand that there is a housing shortage and that Tualatin and surrounding cities will benefit financially from adding so many houses... so this development is getting done whether current residents like it or not. We have lived in Tualatin since 2011, and planned on staying here to raise our young children for at least another 15 years. All we are asking for is for common sense to prevail when it comes to traffic, and to PLEASE leave the trees alone that border Norwood Road.

Thank you,

Kendra, Zack, Carson & Lexi Nell

**From:** cynthiaray201@gmail.com  
**Sent:** Monday, August 10, 2020 3:55 PM  
**To:** Nicole J. Morris; Tabitha Boschetti  
**Subject:** For tonight's City Counsel Meeting regarding the Norwood project

Dear Nicole and Tabitha

Could you please add this letter to the others for review

Thank you!  
Cyndy

I would like to start this off by saying that we are not naïve enough to think that we can stop this project, but we do want to have the chance to ask that some mindful, environmentally healthy adjustments to the plans are made so our lives and the environment are not completely destroyed by the City Council's decisions regarding this project.

The main points we have all been discussing are:

Traffic issues – The huge increase in traffic from the project and lack of adequate infrastructure is a huge concern. This project will only provide access onto Norwood Drive, one access point immediately across from SW 89<sup>th</sup> Place, and the other across from SW Vermillion Drive. We are talking about a development of 24 acres of land, with a projected home count of at least 150 homes. This equates to an estimated 600+ ADDITIONAL vehicle trips on Norwood Road per day. Whereas a traffic light will no doubt be installed, that will not decrease the vehicle head count in OUR residential area, and will leave us all with long lines of idling vehicles outside of our fences/back yards waiting for their chance to get onto Lower Boones Ferry. How unhealthy and not at all what we moved to this area for! Not only will this huge increase of traffic on Norwood Drive be a nightmare, the impact to the ability to access Lower Boones Ferry will make travel for this whole area next to impossible. Lower Boones Ferry is already an issue during commute time. And the even worse, this is not taking into account the additional vehicle traffic which will be added to this mess by the Autumn Sunrise development, located south of Norwood Drive on Lower Boones Ferry, a 38.00 acre [including right of way acreage] project. Then add the people who always use Lower Boones Ferry in an attempt to escape/bypass the I-5 commute time "parking lot" to get to and from not only the existing homes, which will now also include the Norwood and Autumn Sunrise housing projects as well as the 2 new housing projects under development in Wilsonville. Completely unacceptable.

The Trees: This development's plans are to clear cut the acreage for their project. This from a city that touts itself as a "Tree City USA" city? Trees in this wooded area are used on a regular basis by eagles and other wildlife! This will negatively impact the environment, wildlife and quality of life for all of us and for those who move here in the future. The trees help to provide cooling for the environment, habitat for wildlife, including eagle, as well as filter the airborne contaminants and noise produced by the existing traffic, including the I-5 traffic [aka commute

traffic parking lot]. While we sadly realize that SOME trees must be removed for the project, we would like to see some mindful and environmentally responsible action/thinking on the part of the city and builders by way of an agreement to a minimum 80-foot setback from Norwood Road, along Norwood Road for the length of the project to preserve trees along the road, as Horizon Community Church has done, as well as to put green spaces throughout their development SAVING groves of 5 or more trees to provide small parks and nature paths though out. We would like to see the healthy, existing trees utilized for these groves, not some “promised” tiny saplings “planted” by the builders after the development is done. IF those were to survive, it would take decades for them to provide habitat for wildlife, to be helpful for the environment and to provide the visual appeal that the existing fir trees provide. This will help keep the project from being a heat island and provide much needed natural, environmentally friendly recreational spaces for the project’s new residents as well as the members of our neighborhood. With no resources such as parks or other public green spaces within walking distance, and considering the fact that studies show that having green spaces have been proven to benefit mental health, this is something that should be a priority for both the builder and the City Council members.

I hope that the City Council will see the importance of Tualatin being a beautiful environmentally friendly place to live by seeing that not only the Norwood project, but all future new housing developments, do not clear cut the land and follow the suggestions above to utilize existing native trees. Keeping existing groves of trees for the environment and for citizens to enjoy will make the developments more than just another future housing mess. If the trees are kept in groves, as long as the builders do not intentionally destroy the roots, the trees are able to support each other and will continue to be stable. I also hope that the City Council will not approve massively over built developments, especially when there are not the resources nor infrastructure to support them.

I hope that you will take the necessary action and consider our suggestions as outlined above. We would all like to believe that our thoughts and the ideas we have been invited to share are seriously considered and will be acted upon, and that the environment and quality of life for all of us EXISTING citizens who have lived here and supported the city and its endeavors throughout the years will not be destroyed by those who are there to look out for us.

Thank you  
Cyndy Ray

**From:** Sherilyn Lombos  
**Sent:** Monday, August 10, 2020 6:37 PM  
**To:** Aquilla Hurd-Ravich; Steve Koper; Tabitha Boschetti  
**Subject:** FW: Basalt 20-0003 8/10/20

FYI...

*Sherilyn Lombos*

Tualatin City Manager  
Desk: 503.691.3010 | Mobile: 971.998.4127

---

**From:** Megan George <[mgeorge@tualatin.gov](mailto:mgeorge@tualatin.gov)>  
**Sent:** Monday, August 10, 2020 5:31 PM  
**To:** Council <[council@tualatin.gov](mailto:council@tualatin.gov)>  
**Subject:** Fwd: Basalt 20-0003 8/10/20

Hello Again -

Passing along the following comment.

Best,

Megan

Sent from my iPhone

Begin forwarded message:

**From:** "tom.re@comcast.net" <[tom.re@comcast.net](mailto:tom.re@comcast.net)>  
**Date:** August 10, 2020 at 5:23:17 PM PDT  
**To:** Megan George <[mgeorge@tualatin.gov](mailto:mgeorge@tualatin.gov)>  
**Subject:** Basalt 20-0003 8/10/20

Hello Megan:

Thank you for reaching out for Nicole – I sent a message to her but seems it did not go thru – resending to you.

We owned property in Basalt Creek (23500 SW Boones Ferry Rd) that CPAH now owns outright – we have no dog in this property revision review. After attending countless meetings regarding the planning for this area, I absolutely 100% fully support Venture Prop / Lennar Homes / Autumn Sunrise proposed revisions for their planned development. I feel it not only meets but exceeds the state of Oregon's, Metro's, City of Tualatin's goals of providing much needed additional housing at its most economical levels for ownership and renters. It is the best use of that property and will be an asset to the community and the City of both Tualatin and Wilsonville.



Thank you,  
Tom & Kathy Re  
19035 SW Chesapeake Dr.  
Tualatin, OR. 97062  
503-816-2171

**From:** Mike Sorem <michael.sorem@gmail.com>  
**Sent:** Monday, August 10, 2020 4:30 PM  
**To:** Nicole J. Morris; Tabitha Boschetti  
**Subject:** Norwood Text Amendment

**Dear City Council Members of the City of Tualatin,**

**My name is Mike Sorem and my wife and I have lived in Tualatin for the past 6 years (3 at the Eddyline Apartments and 3 years at 5805 SW Sequoia Drive) and my wife and I are in favor of the proposed text amendment.**

**We love the city and have several friends who would love to move to our area, but find that the existing housing supply is too expensive for their families. The proposed amendment would not change the existing density, so the number of units would not change. However, it would promote diversity in housing types, which would allow for more diversity in pricing, which would allow a higher percentage of people to be able to afford homes in this area. It would also provide for different housing sizes and types, which makes for a more picturesque neighborhood. Thank you for your consideration.**

**Sincerely,**

**Mike and Holly Sorem**

**From:** ghiefield@aol.com  
**Sent:** Monday, August 10, 2020 4:03 PM  
**To:** Tabitha Boschetti  
**Subject:** Re: SW Norwood annexation and overall land use review context

Hi Tabitha,

I have just copied and pasted the text of one of my letters here and hope that you can figure out how to reach Nicole Morris or figure out how to get it in the public comment:

Here's Number One:

**Please no new subdivision**

---

Tue, Jun 23, 2020 1:15 pm

**Dear Mr. Mayor and City Council Members,**

**I am writing on behalf of my friends and neighbors in the Norwood Heights neighborhood. We are deeply troubled by the proposal to build a new subdivision on Norwood next to Horizon School. Many of us were opposed to the annexation of that area and lost that battle but felt that our concerns were heard when the school was built rather than new houses. We felt heard and affirmed when the woods next to the school were kept natural as well. Now it seems the City has changed and the new people don't know what we had understood: We need that grove of trees for many reasons, the most important one being for the health of our children and citizens.**

**The grove of trees lining I5 not only acts as a sound barrier, but, it is a filter of toxins released by trucks and cars speeding up and down I5 24 hours per day, 7 days a week. We discussed the amazing noise pollution created by I5, as well as the air pollution and the city and metro representatives seemed to agree with us that there should always be a certain amount of acreage between a freeway and homes. As you know developers found out the hard way after they built and sold homes on Mandan Dr. with NO buffer. Children, adults, even animals and plants have not flourished on that street and in fact they have suffered. Of course the poor and most elderly live in those homes and it is a blight on the character of our city that the development was ever allowed. 5 years ago during the talks regarding the Basalt Creek map, we all agreed that the health of our citizens was our priority. The mayor at the time was even interested in making Tualatin a Blue Zone. Now it appears that the new city leaders are willing to take money in exchange for the health of its citizens! Please say it isn't so.**

**Please, use the positions we elected you for to resist the siren call of development money and stand up for the health of your constituents, and for people not informed enough to stand up for themselves. Please, limit the removal of our natural noise and air pollution filter. Once upon a time Beaverton and Tigard had deer, green spaces, clean air, and quiet neighborhoods. Now you can't tell where one ends and the other starts and it is all traffic and no wildlife. PLEASE protect our town and protect us and do not develop the woods on our borders. If you cannot stop the development, please, require the developer to maintain acreage of large stands of trees next to I5.**

Thanks,

**Gillian Stratton and Neighbors**  
Here's Number Two:

On Tue, Jun 23, 2020 at 12:47 PM <[ghiefield@aol.com](mailto:ghiefield@aol.com)> wrote:

Dear Mr. Kellogg,

I am a resident of the Norwood Heights neighborhood asking you to please consider us when making your decision about the development next to Horizon Christian. I know that this was part of the Basalt Creek deal, but, on behalf of my neighbors we are asking you to limit the development for a simple and important reason: It changes the good faith agreement we made during those discussions.

The most important reason we are asking you to use your position on our behalf is because 5-10 years ago when we all participated in the discussions about the Basalt Creek/metro deal, we understood that there would be green space and/or natural space between us and our neighboring cities. We all agreed that we did not want to lose the small city feel of Tualatin and that clear borders created by green spaces would be the best way to keep from turning into a bay area or Beaverton where you can't tell where Portland, Tigard, and Beaverton start and stop. Once the green spaces that created the borders were gone, so was the small city feel. Now it is urban sprawl.

Please, please, uphold the agreement the people before you made. I know you haven't been mayor long, but I voted for you. I don't know if you've been a resident long, but, we had an understanding with Lou who was very pro development that the beautiful borders would be maintained. We all discussed wanting to be more like Lake Oswego than Tigard and it was the natural areas on the borders that we identified as important to keep. Please be our champion and do everything you can to maintain the green space at our border. We know that some times you can't stop development but, you can influence how the space is used and for example how many acres of tress or farmland must remain. Please do your best for keeping Tualatin "Tree City" USA, a beautiful and discreet little city.

Thank you so much for all that you do for our city. I know you're a volunteer and was so proud to see you at the LO summit on race. I get the feeling that you care more about your residents than money, and I appreciate that.

Sincerely,  
Gillian Stratton

-----Original Message-----

From: Tabitha Boschetti <[tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)>

To: [ghiefield@aol.com](mailto:ghiefield@aol.com) <[ghiefield@aol.com](mailto:ghiefield@aol.com)>

Sent: Mon, Aug 10, 2020 11:12 am

Subject: RE: SW Norwood annexation and overall land use review context

Gillian,

I'll be glad to see you online. I'm pasting the link below; you can also check out the full Council agenda here:

<https://meetings.municode.com/adaHtmlDocument/index?cc=TUALTNOR&me=f9420f055c41476c989f0a0f23e15a23&ip=True>.

Link:

<https://us02web.zoom.us/j/82343960600?pwd=K2lVbFhGUjJnaEZDbW1wMndkemFqUT09>

Phone: +1 669 900 6833

Meeting ID: 823 4396 0600

Password: 18880

Take care,

**Tabitha Boschetti, AICP**

503.691.3029 | [tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)

**From:** [ghiefield@aol.com](mailto:ghiefield@aol.com) <[ghiefield@aol.com](mailto:ghiefield@aol.com)>  
**Sent:** Monday, August 10, 2020 10:54 AM  
**To:** Tabitha Boschetti <[tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)>  
**Subject:** Re: SW Norwood annexation and overall land use review context

Hi Tabitha,

Is there a Zoom link for today's meeting regarding the Norwood development? Would you mind sending it to me? Thank so much!  
gillian

-----Original Message-----

From: Tabitha Boschetti <[tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)>  
To: [ghiefield@aol.com](mailto:ghiefield@aol.com) <[ghiefield@aol.com](mailto:ghiefield@aol.com)>  
Sent: Fri, Jul 10, 2020 10:39 am  
Subject: RE: SW Norwood annexation and overall land use review context

Gillian,

As an additional follow-up, I wanted to let you know that the Plan Text Amendment (PTA 20-0003) will also be a topic of discussion at the next Tualatin Planning Commission meeting, Thursday, July 16<sup>th</sup> at 6:30pm and the agenda is now online.

This meeting is not a hearing, but the public is invited to attend. The Tualatin Planning Commission, in their advisory role, will hear about the proposed code changes and decide on any recommendations to forward to City Council. The meeting will be held virtually on Zoom:

**Tualatin Planning Commission. Thursday, July 16<sup>th</sup>, 6:30pm**

Register in advance for this meeting:

<https://us02web.zoom.us/j/82471548974?pwd=WGJJV1I0d3BIb25RU1UvZmV6L0JTZz09>

After registering, you will receive a confirmation email containing information about joining the meeting.

*All meetings of the Planning Commission are open to the public. If you need special assistance or accommodation to participate in this meeting, contact Steve Koper, AICP, Planning Manager, at [skoper@tualatin.gov](mailto:skoper@tualatin.gov) or 503-691-3028. Notification thirty-six (36) hours prior to the meeting will enable the City to make reasonable arrangements to assure accessibility to this meeting.*

The agenda for the meeting: <https://mccmeetings.blob.core.usgovcloudapi.net/tualtnor-pubu/MEET-Agenda-ca6551efa01346e9ac55a6145ce88805.pdf>

The packet for the meeting including presentation and staff report:

<https://mccmeetings.blob.core.usgovcloudapi.net/tualtnor-pubu/MEET-Packet-ca6551efa01346e9ac55a6145ce88805.pdf>

The City Council hearing for the Plan Text Amendment and Annexation cases is still scheduled for August 10, 2020.

Take care,

**Tabitha Boschetti, AICP**  
503.691.3029 | [tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)

---

**From:** Tabitha Boschetti  
**Sent:** Tuesday, June 30, 2020 4:56 PM  
**To:** 'ghiefield@aol.com' <[ghiefield@aol.com](mailto:ghiefield@aol.com)>  
**Subject:** RE: SW Norwood annexation and overall land use review context

Gillian,

Thank you for sharing. As an update, the applications I mentioned are now online:

- Annexation ANN 20-0003: <https://www.tualatinoregon.gov/planning/ann-20-0003-norwood-annexation>
- Plan Text Amendment PTA 20-0003: <https://www.tualatinoregon.gov/planning/pta-20-0003-basalt-creek-rml-plan-text-amendment>

The notices will be going out soon for these two applications with hearings scheduled for the August 10<sup>th</sup> City Council meeting; if you were on the mailing list for the Neighborhood/Developer meeting notice you should be on this notice as well. For these upcoming applications, my staff report will be focused on the Annexation and Plan Text Amendment criteria specifically. I will of course be discussing the comments I receive from you and your neighbors, but ultimately bringing that back to the criteria. While these applications don't yet touch upon your concerns as specifically as the anticipated future Subdivision application would, I encourage you to check out the applications and decide if there are pieces of those applications you want to address more specifically in the testimony.

Take care,

**Tabitha Boschetti, AICP**  
503.691.3029 | [tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)

**From:** [ghiefield@aol.com](mailto:ghiefield@aol.com) <[ghiefield@aol.com](mailto:ghiefield@aol.com)>  
**Sent:** Tuesday, June 30, 2020 9:06 AM  
**To:** Tabitha Boschetti <[tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)>  
**Subject:** Re: SW Norwood annexation and overall land use review context

DEar Tabitha,

Here is what my second letter to the city council says. My neighbors and I all feel strongly about this and are grateful for your help. The mayor was not encouraging. Bummer.

Dear Mr. Mayor and City Council Members,

I am writing on behalf of my friends and neighbors in the Norwood Heights neighborhood. We are deeply troubled by the proposal to build a new subdivision on Norwood next to Horizon School. Many of us were opposed to the annexation of that area and lost that battle but felt that our concerns were heard when the school was built rather than new houses. We felt heard and affirmed when the woods next to the school were kept natural as well. Now it seems the City has changed and the new people don't know what we had understood: We need that grove of trees for many reasons, the most important one being for the health of our children and citizens.

The grove of trees lining I5 not only acts as a sound barrier, but, it is a filter of toxins released by trucks and cars speeding up and down I5 24 hours per day, 7 days a week. We discussed the amazing noise pollution created by I5, as well as the air pollution and the city and metro representatives seemed to agree with us that there should always be a certain amount of acreage between a freeway and homes. As you know developers found out the hard way after they built and sold homes on Mandan Dr. with NO buffer. Children, adults, even animals and plants have not flourished on that street and in fact they have suffered. Of course the poor and most elderly live in those homes and it is a blight on the character of our city that the development was ever allowed in the first place. 5 years ago during the talks regarding the Basalt Creek map, we all agreed that the health of our citizens was our priority. The mayor at the time was even interested in making Tualatin a Blue Zone. Now it appears that the new city leaders are willing to take money in exchange for the health of its citizens! Please say it isn't so.

Please, use the positions we elected you for to resist the siren call of development money and stand up for the health of your constituents, and for people not informed enough to stand up for themselves. Please, limit the removal of our natural noise and air pollution filter. Once upon a time Beaverton and Tigard had deer, green spaces, clean air, and quiet neighborhoods. Now you can't tell where one ends and the other starts and it is all traffic and no wildlife. PLEASE protect our town and protect us and do not develop the woods on our borders. If you cannot stop the development, please, require the developer to maintain acreage of large stands of trees next to I5.

Thanks,

Gillian Stratton and Neighbors

-----Original Message-----

To: [tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov) <[tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)>

Sent: Tue, Jun 23, 2020 12:32 pm

Subject: Re: SW Norwood annexation and overall land use review context

Dear Tabitha,

Thank you for your help. I have copied and pasted my first letter to the mayor below. I intend to also write our city council members and am asking you to forward my letter to whomever in your department is able to influence how the development proceeds. My neighbors and I met last night in our driveway and brainstormed about 10 strong reasons why the development should be limited, but, I am passionate about my most important reason: If we develop right up to our border and Wilsonville does the same thing, there will be no discernable city and the very character of our town will be lost.

Dear Mr. Mayor,

I am a resident of the Norwood Heights neighborhood asking you to please consider us when making your decision about the development next to Horizon Christian. I know that this was part of the Basalt Creek deal, but, on behalf of my neighbors we are asking you to limit the development for a simple and important reason: It changes the good faith agreement we made during those discussions.

The most important reason we are asking you to use your position on our behalf is because 5-10 years ago when we all participated in the discussions about the Basalt Creek/metro deal, we understood that there would be green space and/or natural space between us and our neighboring cities. We all agreed that we did not want to lose the small city feel of Tualatin and that clear borders created by green spaces would be the best way to keep from turning into a bay area or Beaverton where you can't tell where Portland, Tigard, and Beaverton start and stop. Once the green spaces that created the borders were gone, so was the small city feel. Now it is urban sprawl.

Please, please, uphold the agreement the people before you made. I know you haven't been mayor long, but I voted for you. I don't know if you've been a resident long, but, we had an understanding with Lou

who was very pro development that the beautiful borders would be maintained. We all discussed wanting to be more like Lake Oswego than Tigard and it was the natural areas on the borders that we identified as important to keep. Please be our champion and do everything you can to maintain the green space at our border. We know that some times you can't stop development but, you can influence how the space is used and for example how many acres of tress or farmland must remain. Please do your best for keeping Tualatin "Tree City" USA, a beautiful and discreet little city.

Thank you so much for all that you do for our city. I know you're a volunteer and was so proud to see you at the LO summit on race. I get the feeling that you care more about your residents than money, and I appreciate that.

Sincerely,  
Gillian Stratton

Thanks Tabitha!

-----Original Message-----

From: Tabitha Boschetti <[tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)>

To: [ghiefield@aol.com](mailto:ghiefield@aol.com) <[ghiefield@aol.com](mailto:ghiefield@aol.com)>

Sent: Wed, Jun 17, 2020 12:36 pm

Subject: SW Norwood annexation and overall land use review context

Gillian,

Thank you for your earlier call about potential future development at property south of SW Norwood Road west of I-5. As we discussed, there are three land use reviews that require public notice prior to development, with different opportunities to weigh in. My hope is to outline those below and highlight where there is the greatest leverage for influencing what happens with the property. I've also included general contact information for City Council and other information for the site below.

#### **Land use reviews and public testimony:**

- **Plan Text Amendment.**

- o This application has been submitted; the applicant has held their Neighborhood/Developer meeting.
- o The City Council hearing is not yet scheduled. The City will mail hearing notices inviting public testimony when it is scheduled and will put the application materials online.
- o In this application, the applicant is requesting to make it easier to develop single-family houses instead of attached housing. The current code calls for attached housing types, or a Conditional Use Permit for a subdivision that allows single dwelling homes.
- o This application has the broadest approval criteria. City Council needs to find that the proposed code changes are in the public interest. The applicant is essentially asking to change the criteria that would apply at the time of a future subdivision application, making this the area where the public has the greatest relative traction with regard to changing those criteria.
- o The code section with criteria for this application is online here:  
[https://library.municode.com/or/tualatin/codes/development\\_code?nodeld=THDECOTUOR\\_CH33APAPCR\\_TDC\\_33.070PLAM](https://library.municode.com/or/tualatin/codes/development_code?nodeld=THDECOTUOR_CH33APAPCR_TDC_33.070PLAM)

- **Annexation.**

- o This application has been submitted; the Neighborhood/Developer meeting needs to be held, along with some other paperwork details, before it will be deemed complete.
- o The City Council hearing not yet scheduled. The City will mail hearing notices inviting public testimony when it is scheduled and will put the application materials online.



- o The request for this application is to adjust the city boundary to bring this property into the City of Tualatin.
  - o There will be a City Council hearing to consider the proposal. The criteria are somewhat more objective. The specific code criteria in our code can be found here: [https://library.municode.com/or/tualatin/codes/development\\_code?nodemd=THDECOTUOR\\_CH33APAPCR\\_TDC\\_33.010AN](https://library.municode.com/or/tualatin/codes/development_code?nodemd=THDECOTUOR_CH33APAPCR_TDC_33.010AN)
  - o The approval criteria reference a lot of other government statutes, which can make it pretty opaque. I'm attaching the Analysis and Findings from the annexation application for the property south of Horizon which walk through the criteria as it applied to that site; I hope that makes it a bit clearer what kind of considerations are in play for approving an annexation.
- **Subdivision.** (not yet submitted or scheduled for Neighborhood/Developer meeting)
    - o This application has not yet been submitted. The applicant cannot submit this application until after City Council approves an annexation.
    - o The criteria for approving a subdivision are more technical in nature (transportation impacts and mitigation; lot dimensions meeting minimum standards). This is a staff level decision with a public notice period inviting comments to staff. The subdivision does not go to a public hearing unless the staff decision is appealed. The application is primarily evaluated by our Engineering staff.
    - o Environmental impacts and any potential mitigation are evaluated during this application process by the City's partner agency, Clean Water Services.
    - o The general criteria for approving a subdivision are here: [https://library.municode.com/or/tualatin/codes/development\\_code?nodemd=THDECOTUOR\\_CH36SUPAPRLIAD\\_TDC\\_36.120TESUPL](https://library.municode.com/or/tualatin/codes/development_code?nodemd=THDECOTUOR_CH36SUPAPRLIAD_TDC_36.120TESUPL)
  - The next steps toward development would follow an approved subdivision and not have a public notice period. Developers are generally required to create public infrastructure like sidewalks ahead of new home development. New homes need to meet standards in the adopted city code; these are evaluated in an Architectural Review—Single Family application reviewed by staff, followed by building permits.

**MORE INFORMATION:**

After an application is deemed complete (meaning we have everything needed to evaluate the application) the City will post information about the application online here: <https://www.tualatinoregon.gov/projects>

More general information about contacting your City Council is online here:

<https://www.tualatinoregon.gov/citycouncil/meet-your-council>. There is a general Council contact email ([council@tualatin.gov](mailto:council@tualatin.gov)) or you may contact specific members as noted on the site. As I was saying, Council is a public body accountable to the voters so you can contact them at any point. That said, there is an advantage to also commenting specifically during the formal public comment period for a specific land use hearing; if someone decides to appeal a formal land use decision, they generally need to have testified during the public comment period.

As additional background, the Basalt Creek Concept Plan applied future Medium-Low Density Residential (RML) zoning to this area to be applied upon annexation.

You can find a copy of the Basalt Creek Concept Plan here:

[https://www.tualatinoregon.gov/sites/default/files/fileattachments/planning/page/4509/exhibit\\_2\\_-\\_basalt\\_creek\\_concept\\_plan.pdf](https://www.tualatinoregon.gov/sites/default/files/fileattachments/planning/page/4509/exhibit_2_-_basalt_creek_concept_plan.pdf) My understanding is that the change to the Urban Growth Boundary was started in 2004, but it took longer for Tualatin, Wilsonville, and Metro to develop this plan. For comparison, RML is the same zoning as is applied north of SW Norwood between Boones Ferry and approximately SW 87<sup>th</sup>. Our zoning map online (<https://www.tualatinoregon.gov/planning/zoning-map-interactive-viewer>) is also helping for viewing the existing city boundary and Urban Planning Area boundary (the area not currently within Tualatin, but generally eligible to apply for annexation). Note that the map shows future zoning that would be applied for properties not currently within city limits.

In my professional assessment, an outcome that sees no development whatsoever is not the most likely given that City Council already approved the Basalt Creek Concept Plan which shows how residential development can be accommodated in our swiftly growing and housing-constrained region. There is also a broader legal context surrounding property rights that any Council land use decision needs to operate within. That said, I think there are several points during this process where there are definitely opportunities to shape how the proposal responds to the existing neighborhood, environment, and overall context. I am happy to discuss any further questions.

Sincerely,

**Tabitha Boschetti, AICP**

Assistant Planner

City of Tualatin | Community Development

503.691.3029

[www.tualatinoregon.gov](http://www.tualatinoregon.gov)

[tboschetti@tualatin.gov](mailto:tboschetti@tualatin.gov)

*My pronouns are she/her*



# **Basalt Creek Text Amendment City Council Hearing**

**Monday, August 10, 2020**



# Introductions

## Applicants

Lennar Northwest, Inc.



Michael Anders, Director of Land Acquisition  
David Force, Forward Planning Manager

Venture Properties, Inc.



VentureProperties  
INCORPORATED

Kelly Ritz, President  
Al Jeck, Project Manager

## Property Owners

P3 Properties, LLC  
Autumn Sunrise, LLC

## Land Use and Civil Engineering

AKS Engineering and Forestry

Mimi Doukas, AICP, RLA



## Legal Counsel

Schwabe Williamson and Wyatt

Michael Robison



# What is being proposed?

**The Applicants are requesting a change to the City of Tualatin's Development Code to allow detached housing in the RML zone.**

- Addition of single-family detached housing as an allowed use in the Residential Medium-Low (RML) District
  - Only in the Basalt Creek Planning Area in the RML zone
  - Only for project sites 15 acres or larger
  - Removes need for a discretionary Conditional Use Permit
- Addition of development standards for detached homes in the Basalt Creek Planning Area
  - Lot Size Averaging
  - Setback and lot coverage standards for Basalt detached lots
- **No density changes have been proposed**

# What is being proposed?

## The Applicants are requesting a change to the City of Tualatin's Development Code to allow detached housing in the RML zone.

- Addition of single-family detached housing as an allowed use in the Residential Medium-Low (RML) District
  - Only in the Basalt Creek Planning Area in the RML zone
  - Only for project sites 15 acres or larger
  - Removes need for a discretionary Conditional Use Permit
- Addition of development standards for detached homes in the Basalt Creek Planning Area
  - Lot Size Averaging
  - Setback and lot coverage changes for small lots
- **No density changes have been proposed**
- Added language to the RML purpose statement to reflect this change
- Added a provision requiring a minimum of 15% attached homes

# From the 2019 Housing Needs Analysis:

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).

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 660-007<sup>52</sup>:
  - **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.

### TDC 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**

<b>HOUSING TYPE</b>	<b>STATUS</b>	<b>LIMITATIONS AND CODE REFERENCES</b>
Single-Family Dwelling	C/P	Limited to single-family dwellings in a small lot subdivision, with conditional use permit, subject to TDC 36.410. <b>Permitted for a maximum of 85% of the proposed dwelling units within the Basalt Creek Planning Area subject to TDC 41.330.</b>
Accessory Dwelling Unit	P	Subject to TDC 34.600.
Duplex		
Townhouse (or Rowhouse)	P	See TDC definition in 31.060.
Multi-Family Structure	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.

### TDC 41.300. - Development Standards.

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).



### TDC 41.330. - Development Standards.

Development standards for Household Living Uses in the RML zone within the Basalt Creek Planning Area are listed in Table 41-4. The standards of TDC 41.330 apply to RML-zoned properties within the Basalt Creek Planning Area with project sites which are greater than 15 acres in size. Additional standards may apply to some uses and situations, see TDC 41.310.

**Table 41-4  
Development Standards in the RML Zone within the Basalt Creek Planning Area**

STANDARD	REQUIREMENT	LIMITATIONS AND CODE REFERENCES
<b>MAXIMUM DENSITY</b>		
Household Living Uses	10 units per acre	Up to a maximum of 85% of proposed dwelling units may be detached single-family homes.
<b>MINIMUM AVERAGE LOT SIZE</b>		
Single Family Lot	3,000 square feet	
<b>MINIMUM AVERAGE LOT WIDTH</b>		
Single Family Detached Lot	26 feet	
Townhouse (or Rowhouse)	14 feet	
Flag Lots	—	Must be sufficient to comply with minimum access requirements of TDC 73C.
<b>MINIMUM SETBACKS</b>		
Front Setback		
• building	10 feet	
• garage	20 feet	
Side Setback	5 feet	
Rear Setback	10 feet	
Street side setback	10 feet	
Any Yard Area Adjacent to Basalt Creek Parkway	50 feet	
<b>MAXIMUM STRUCTURE HEIGHT</b>		
All Uses	35 feet	May be increased to a maximum of 50 feet with a conditional use permit, if all setbacks are not less than 1½ times the height of the building.
<b>MAXIMUM LOT COVERAGE</b>		
Single Family Detached Lot	55%	
Townhouse (or Rowhouse)	90%	

## **TDC 5.040. - Planning District Objectives.**

- (2) *Medium-Low Density Residential Planning District (RML)*. To provide areas of the City suitable for commonwall dwellings such as condominiums, townhouses, duplexes, triplexes, and other multi-family dwellings. Condominiums and small lot subdivisions may be allowed by conditional use permit. **Detached housing is permitted for projects over 15 acres in size within the Basalt Creek Planning Area.** Owner occupancy of dwelling units shall be encouraged. Parks for manufactured dwellings shall be allowed in those portions of the district designated on the Plan Map. Except for retirement housing and nursing and convalescent homes which shall not exceed 15 dwelling units per net acre and manufactured dwelling parks with single-wide manufactured dwellings which shall not exceed 12 dwelling units per net acre, the maximum density of any residential use shall not exceed ten dwelling units per net acre. The raising of agricultural animals and the construction of agricultural structures may be allowed by conditional use permit in those portions of the District designated on the Plan Map.

# Key Issues

## How is this in the Public Interest?

- Consistent with Tualatin | 2040
  - Housing affordability
  - Small lot development
- Diversity of housing types
  - Lot size averaging results in increased housing diversity
  - Minimum of 15% proposed housing will be attached
- Current code does not work
  - Density of 10 du/ac does not match apartments
  - Current small lot code results in all 4,500 sf
  - Uncertainty with a discretionary review

## Secondary questions

- Existing Small Lot Conditional Use Permit
- Tree Preservation
- Stormwater

# Tualatin|2040

## High Priorities by Topic

### 1: COMMUNITY AND LIVABILITY POLICY PRIORITIES (HIGH PRIORITY BASED ON STAKEHOLDER FEEDBACK<sup>1</sup>)

#### Housing and Livability

**Housing affordability** was a major topic of discussion and a concern for all stakeholders and some noted the need for the City to have a plan for housing.

**Greater diversity of Housing Types** in Tualatin was broadly supported; many felt a wider variety of options (other than single-family homes) would provide more affordable options. Alternative housing types discussed with stakeholders were **townhomes/rowhouses, mixed-use development, duplexes, triplexes, and accessory dwelling units (ADU)**. Most stakeholders were in favor of the full range of housing types. One stakeholder noted that small lot and zero lot line subdivisions could provide higher density that doesn't feel cramped.

**Basalt Creek** was mentioned by a number of stakeholders. Others noted that the proposed zoning allows for a good diversity of housing (low density residential, medium low density residential and some high density residential, but that lots should be 3,000 or 4,000 square foot lots.

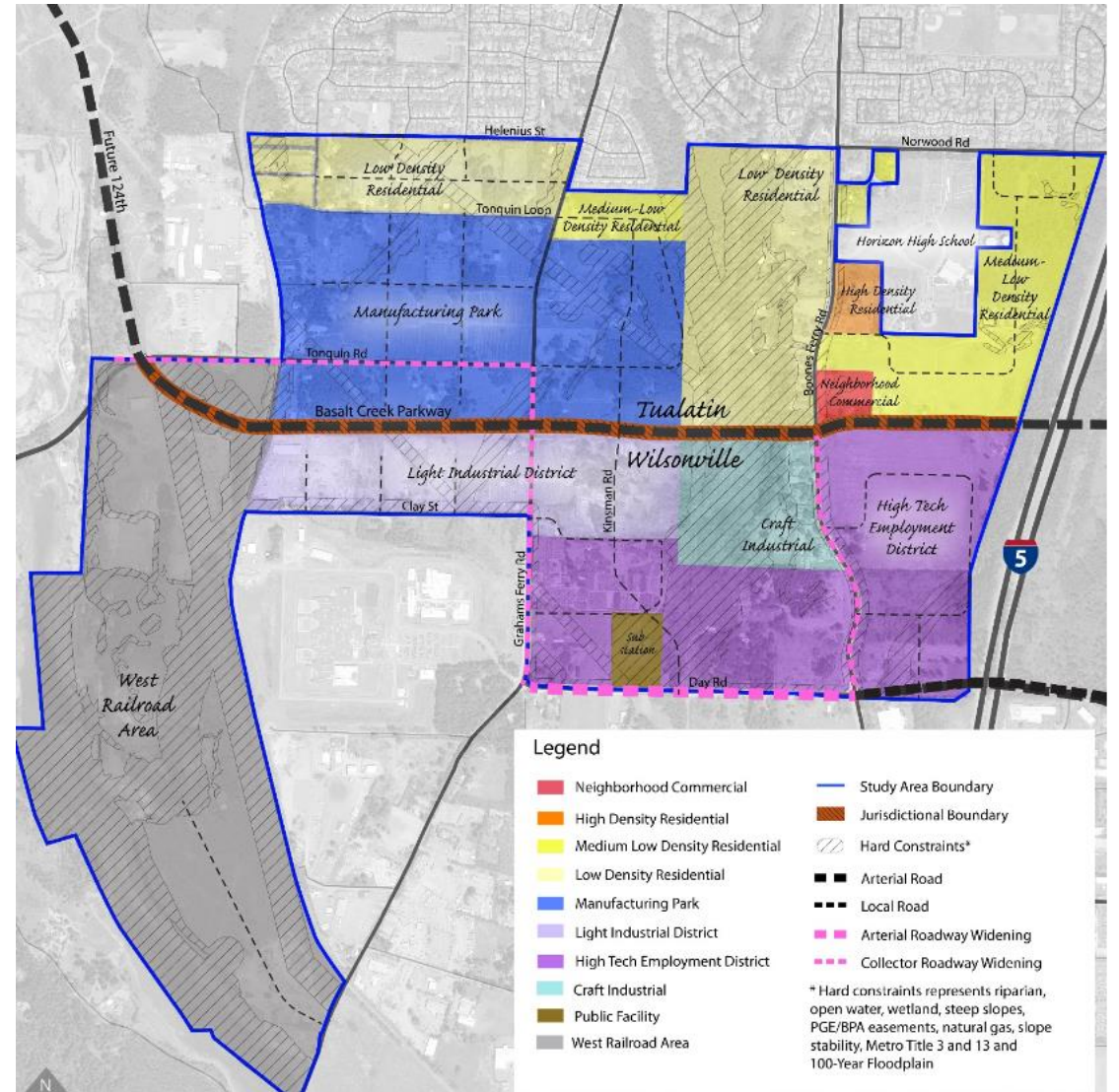
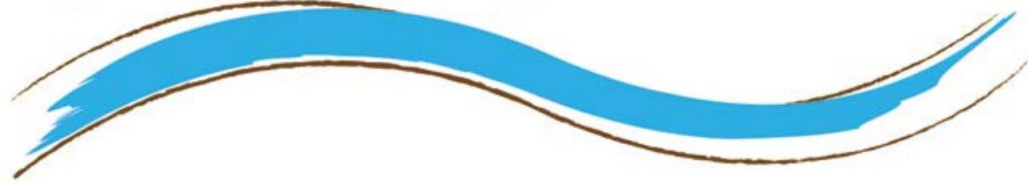
# Tualatin|2040

## Summary of Actions

The table below summarizes the strategies, actions, and recommendations made by the CAC. The priority shown in the table is based on discussions with the CAC about the actions they view to be in need of prompt attention. Low-priority actions represent actions that the CAC thinks are important but that may be executed later in the Tualatin 2040 process. At some level, all of the actions in this strategy are a high priority for the CAC.

Strategies, Actions, and Recommendations	Priority
<b>Strategy 1: Ensure an adequate supply of land that is available and serviceable.</b>	
<p><b>Action 1.1. Evaluate opportunities to increase development densities within Tualatin's existing zones by modifying the Development Code.</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recommendation 1.1a:</b> Evaluate increasing densities in the Residential High and Residential High Density / High Rise residential designations by allowing buildings that are five to eight stories tall.</li> <li>▪ <b>Recommendation 1.1b:</b> Conduct an audit of the City's Development Code to identify barriers to residential development (e.g., lot size, setbacks, and lot coverage ratio) and identify alternatives for lowering or eliminating the barriers.</li> <li>▪ <b>Recommendation 1.1c:</b> Evaluate off-street parking requirements for multifamily housing to identify opportunities for reduction in parking requirements, especially for housing developed for groups who have fewer cars.</li> <li>▪ <b>Recommendation 1.1d:</b> Adopt a Planned Unit Development (PUD) ordinance to allow flexibility in both development standards and housing types.</li> </ul>	High

# Basalt Creek Concept Plan





**Legend**

- |  |  |
|--|--|
| <span style="display:inline-block; width:15px; height:15px; background-color:red; border:1px solid black;"></span> Neighborhood Commercial           | <span style="display:inline-block; width:15px; border-bottom:2px solid blue;"></span> Study Area Boundary  |
| <span style="display:inline-block; width:15px; height:15px; background-color:orange; border:1px solid black;"></span> High Density Residential       | <span style="display:inline-block; width:15px; border-bottom:2px solid brown;"></span> Jurisdictional Boundary   |
| <span style="display:inline-block; width:15px; height:15px; background-color:yellow; border:1px solid black;"></span> Medium Low Density Residential | <span style="display:inline-block; width:15px; height:15px; background: repeating-linear-gradient(45deg, transparent, transparent 2px, black 2px, black 4px); border:1px solid black;"></span> Hard Constraints* |
| <span style="display:inline-block; width:15px; height:15px; background-color:lightyellow; border:1px solid black;"></span> Low Density Residential   | <span style="display:inline-block; width:15px; border-bottom:2px solid black;"></span> Arterial Road   |
| <span style="display:inline-block; width:15px; height:15px; background-color:blue; border:1px solid black;"></span> Manufacturing Park               | <span style="display:inline-block; width:15px; border-bottom:2px dashed black;"></span> Local Road   |
| <span style="display:inline-block; width:15px; height:15px; background-color:lightpurple; border:1px solid black;"></span> Light Industrial District | <span style="display:inline-block; width:15px; border-bottom:2px dashed pink;"></span> Arterial Roadway Widening   |
| <span style="display:inline-block; width:15px; height:15px; background-color:purple; border:1px solid black;"></span> High Tech Employment District  | <span style="display:inline-block; width:15px; border-bottom:2px dashed magenta;"></span> Collector Roadway Widening   |
| <span style="display:inline-block; width:15px; height:15px; background-color:teal; border:1px solid black;"></span> Craft Industrial                 |  |
| <span style="display:inline-block; width:15px; height:15px; background-color:brown; border:1px solid black;"></span> Public Facility                 |  |
| <span style="display:inline-block; width:15px; height:15px; background-color:grey; border:1px solid black;"></span> West Railroad Area               |  |

\* Hard constraints represents riparian, open water, wetland, steep slopes, PGE/BPA easements, natural gas, slope stability, Metro Title 3 and 13 and 100-Year Floodplain



**Legend**

- |  |   |
|--|---|
| <span style="color: red;">■</span> Neighborhood Commercial           | <span style="color: blue;">—</span> Study Area Boundary               |
| <span style="color: orange;">■</span> High Density Residential       | <span style="color: brown;">—</span> Jurisdictional Boundary          |
| <span style="color: yellow;">■</span> Medium Low Density Residential | Hard Constraints*   |
| <span style="color: lightyellow;">■</span> Low Density Residential   | <span style="color: black;">—</span> Arterial Road                    |
| <span style="color: blue;">■</span> Manufacturing Park               | <span style="color: black;">- - -</span> Local Road                   |
| <span style="color: lightpurple;">■</span> Light Industrial District | <span style="color: magenta;">—</span> Arterial Roadway Widening      |
| <span style="color: purple;">■</span> High Tech Employment District  | <span style="color: magenta;">- - -</span> Collector Roadway Widening |
| <span style="color: teal;">■</span> Craft Industrial                 |   |
| <span style="color: brown;">■</span> Public Facility                 |   |
| <span style="color: grey;">■</span> West Railroad Area               |   |
- \* Hard constraints represents riparian, open water, wetland, steep slopes, PGE/BPA easements, natural gas, slope stability, Metro Title 3 and 13 and 100-Year Floodplain



# Basalt Creek Concept Plan

## Purpose

*“Housing. Most of the remaining land north of the proposed Basalt Creek Parkway (beyond employment land) is allocated to a mix of residential uses at varying densities. The Concept Plan organizes residential land uses into two general areas that are intended to have easy access to services and be connected to parks, schools, and natural areas.*

*1. The plan focuses the lowest density housing (a mixture of low-density and medium-low density) along the northern portion of the Planning Area and low density along the west side of Boone’s Ferry Road, adjacent to existing neighborhoods of Tualatin. This land is expected to accommodate 134 new households.*

*2. The eastern portion of the Tualatin future annexation area is anticipated to be a mixture of high and medium-low density residential; the land immediately east of Boones Ferry Rd is intended for high density housing; The remainder of the land east and south of Horizon School is planned for medium-low density residential. This eastern subarea is expected to accommodate 407 new housing units in Tualatin. This land is near the intersection between Boones Ferry Road and the new Basalt Creek Parkway.*

# Basalt Creek Concept Plan

From the Findings for Ord No 1418-19:

- Medium Low Density Residential (RML): An area with the RML (Medium Low Density Residential) Zone is proposed south of Norwood Road, east of Boones Ferry Road, and west of I-5. An additional area of RML Zone is also planned east of Grahams Ferry Road between the two above described areas of RL Zone. These areas lends themselves to a slightly higher density than traditional single-family due to the excellent transportation access and the close relationship to the employment centers. The use of the RML District in this area provides for the needed higher densities with a District that will allow development that is similar in character and density to the RL lands.

# RML Zone

## Purpose

*Medium-Low Density Residential Planning District (RML).* To provide areas of the City suitable for commonwall dwellings such as condominiums, townhouses, duplexes, triplexes, and other multi-family dwellings. Condominiums and small lot subdivisions may be allowed by conditional use permit. **Detached housing is permitted for projects over 15 acres in size within the Basalt Creek Planning Area.** Owner occupancy of dwelling units shall be encouraged. Parks for manufactured dwellings shall be allowed in those portions of the district designated on the Plan Map. Except for retirement housing and nursing and convalescent homes which shall not exceed 15 dwelling units per net acre and manufactured dwelling parks with single-wide manufactured dwellings which shall not exceed 12 dwelling units per net acre, the maximum density of any residential use shall not exceed ten dwelling units per net acre. The raising of agricultural animals and the construction of agricultural structures may be allowed by conditional use permit in those portions of the District designated on the Plan Map.

- Red text is proposed by Applicants to reflect proposed text amendment
- Recognizes Small Lot subdivisions
- Owner occupancy is a priority
- Maximum density is 10 dwelling units per acre for most uses

# RML Zone

## TDC 5.040. - Planning District Objectives.

(2) *Medium-Low Density Residential Planning District (RML)*. To provide areas of the City suitable for commonwall dwellings such as condominiums, townhouses, duplexes, triplexes, and other multi-family dwellings. Condominiums and small lot subdivisions may be allowed by conditional use permit. **Detached housing is permitted for projects over 15 acres in size within the Basalt Creek Planning Area.** Owner occupancy of dwelling units shall be encouraged. Parks for manufactured dwellings shall be allowed in those portions of the district designated on the Plan Map. Except for retirement housing and nursing and convalescent homes which shall not exceed 15 dwelling units per net acre and manufactured dwelling parks with single-wide manufactured dwellings which shall not exceed 12 dwelling units per net acre, the maximum density of any residential use shall not exceed ten dwelling units per net acre. The raising of agricultural animals and the construction of agricultural structures may be allowed by conditional use permit in those portions of the District designated on the Plan Map.

- General description provided in the 'Comprehensive Plan' portion of the TDC
- Recognizes Small Lot subdivisions
- Owner occupancy is a priority
- Maximum density is 10 dwelling units per acre for most uses

# RML Zone

*CHAPTER 41 - MEDIUM LOW DENSITY RESIDENTIAL ZONE (RML)*

*TDC 41.100. - Purpose.*

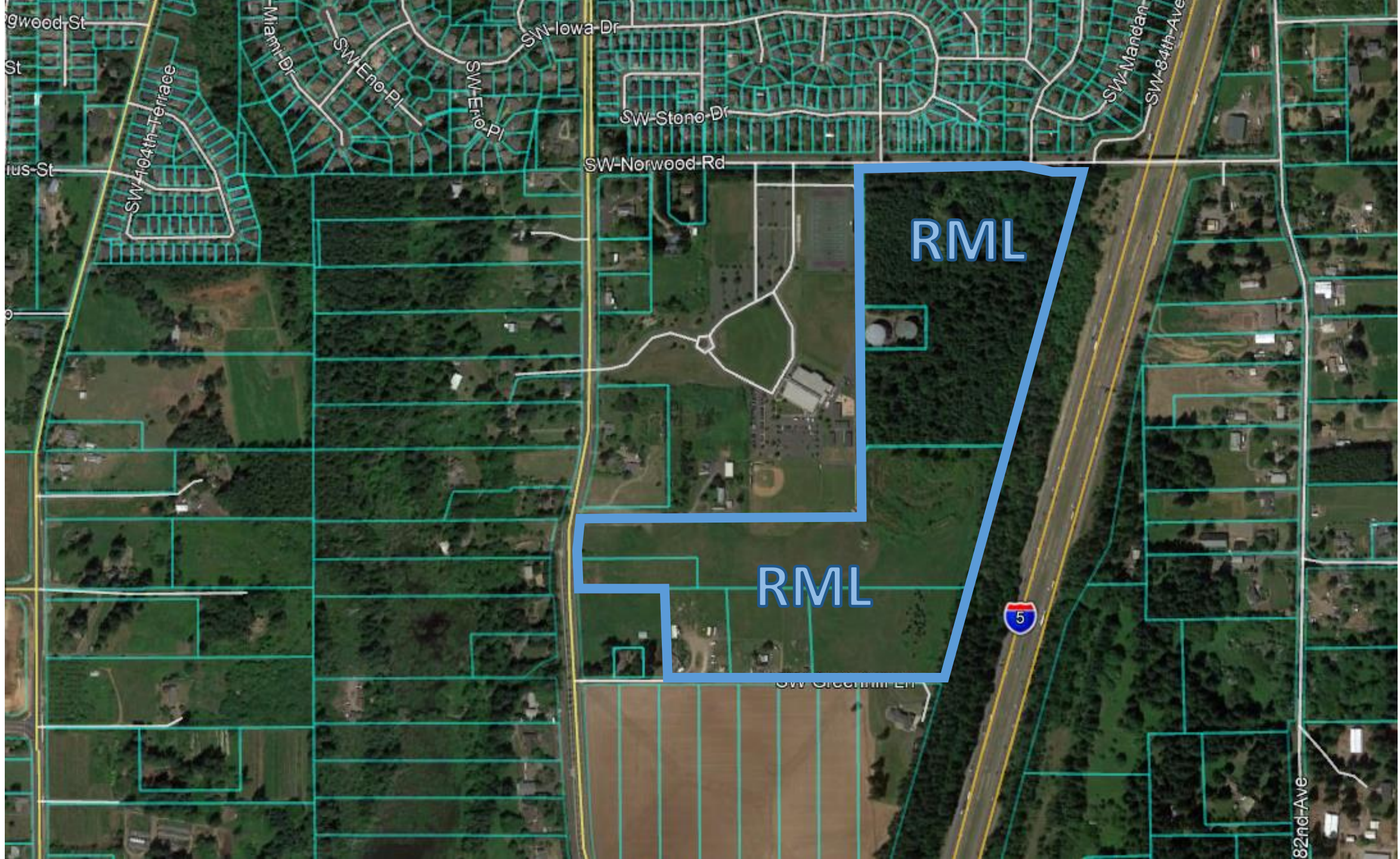
*The purpose of this zone is to provide areas of the City suitable for townhouses, condominiums, duplexes, triplexes and other multi-family dwellings, as well as areas for small-lot, small home subdivisions, and manufactured dwelling parks in designated areas.*

- Defined Purpose Statement for the RML zone
- Expressly states the purpose of the zone includes small-lot, small home subdivisions

# Small Lot Subdivision

(b) *RML Zone*. In the RML zone, small lot subdivisions must comply with the following:

- (i) Small lots must be no less than 4,500 square feet;
- (ii) Maximum building coverage must not exceed 45 percent;
- (iii) Minimum lot width must be at least 30 feet. Lots that have frontage on a public street must have a minimum lot width of 50 feet or 30 feet for lots on a cul-de-sac bulb. For flag lots, the minimum lot width at the street must be sufficient to comply with at least the minimum access requirements contained in TDC [73C](#);
- (iv) Front yard setback must be a minimum of 20 feet to the garage and 12 feet to the house;
- (v) Side yard setback must be a minimum of five feet;
- (vi) On corner lots, the setback for yards adjacent to streets must be a minimum of 20 feet to the garage and 12 feet to the house in the yard where a driveway provides access to a street other than an alley and must be a minimum of 12 feet in the yard where no driveway access exists; and
- (vii) Rear yard setback must be a minimum of 15 feet.

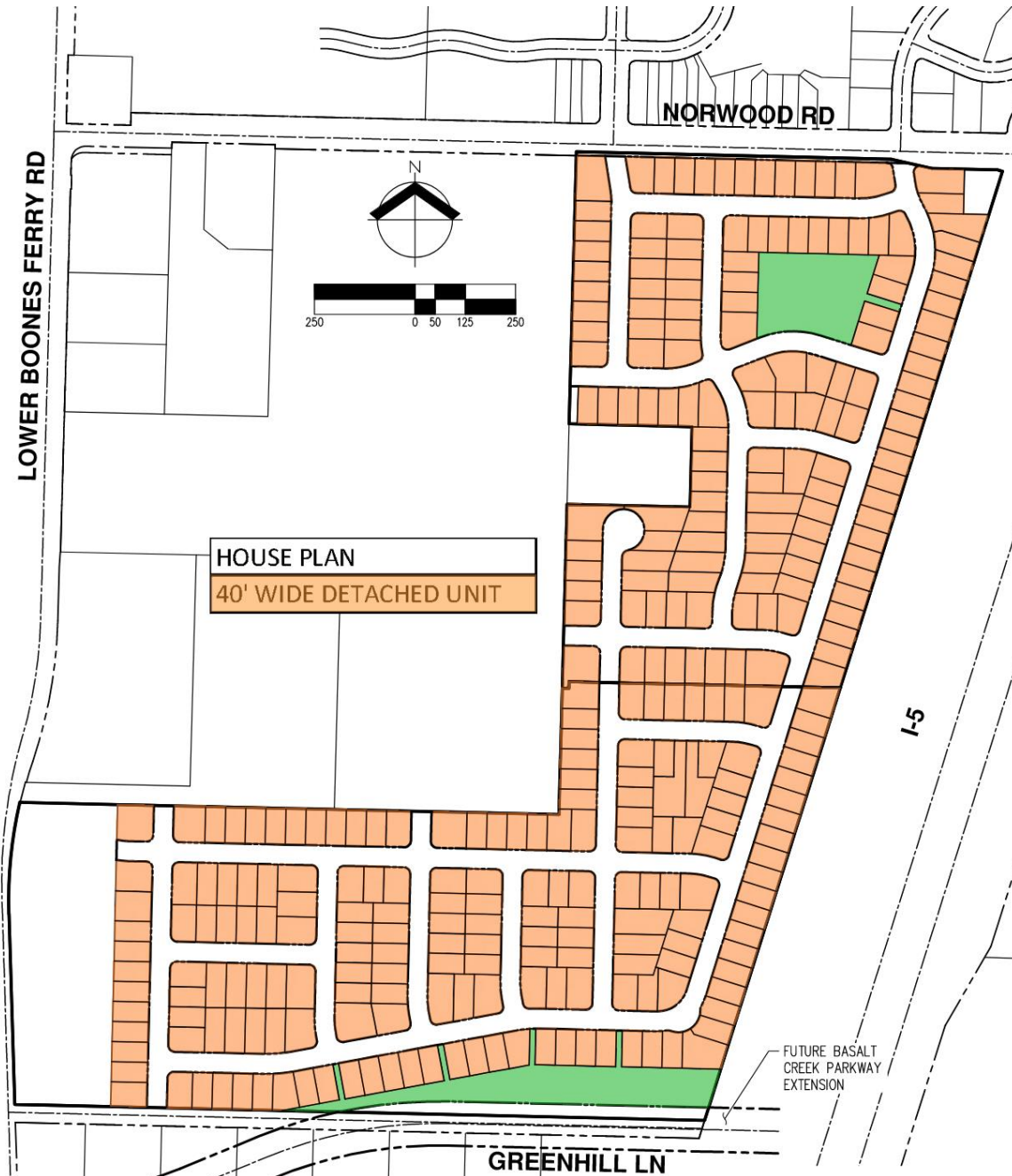


RML

RML



82nd Ave



- All lots 50'x90'
- All lots 4,500 SF
- No diversity
- Discretionary review
- Allowed today

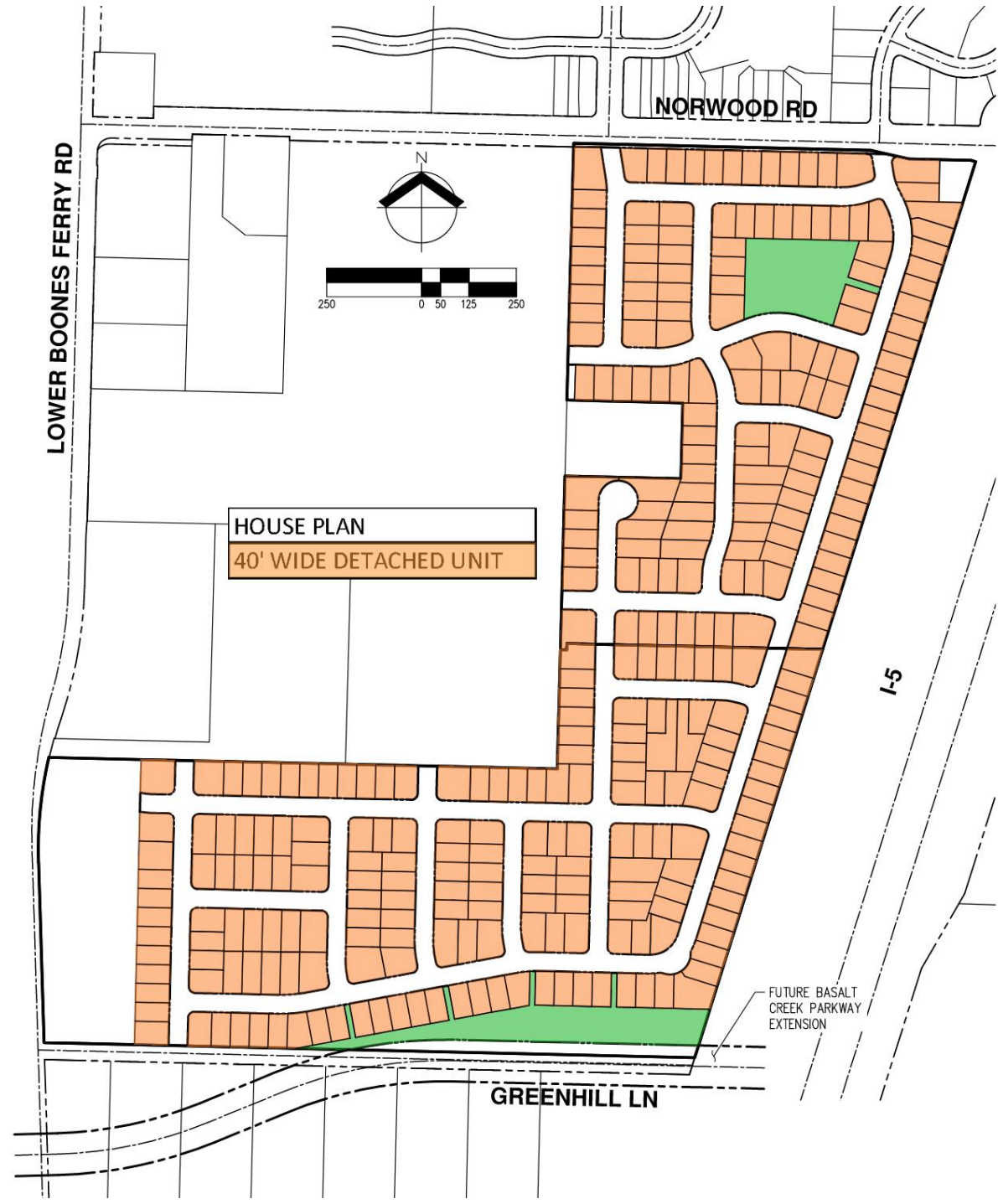
# Small Lot CUP Conceptual Layout





- 15% attached homes
- Five lot sizes
- Five market sectors
- Increased diversity of housing type, range of SF per house, and diversity of house price

# Proposed Code Amendment Conceptual Layout





## Proposed Text Amendment:

- Substantially increases housing diversity within Basalt Creek
- Provides for a minimum of 15% attached homes consistent with the Housing Needs Analysis
- Provides improved compatibility with the existing neighborhoods
- Provides a clear and objective path for detached homes
- Can be a test case for future code amendments

Request approval of the proposed Text Amendment with proposed revisions.

Questions?