

City Council Meeting June 15, 2020



Executive Session 5:00pm

Work Session 5:30pm

Council Meeting 7:00pm

**URA Meeting Following Council Meeting
(All held in Council Chambers)**

This meeting is taking place with social distancing precautions in place:

- Councilors are participating virtually, via Zoom videoconferencing.

To Provide Public Comment

- 1) Written comments may be submitted to the City Recorder (Wilsonville City Hall, 29799 SW Town Center Loop East, Wilsonville, OR 97070).
- 2) Digital comments (email) may be submitted to cityrecorder@ci.wilsonville.or.us.
- 3) Individuals may participate online through the Zoom videoconferencing platform. Contact City Recorder at cityrecorder@ci.wilsonville.or.us or by phone at (503) 570-1506 to register.

You can watch the City Council Meeting here:

You Tube: [youtube.com/c/CityofWilsonvilleOR](https://www.youtube.com/c/CityofWilsonvilleOR)

City of Wilsonville

City Council Meeting

June 15, 2020



AGENDA

**WILSONVILLE CITY COUNCIL MEETING
JUNE 15, 2020
7:00 P.M.**

**CITY HALL
29799 SW TOWN CENTER LOOP EAST
WILSONVILLE, OREGON**

Mayor Tim Knapp

Council President Kristin Akervall
Councilor Charlotte Lehan

Councilor Joann Linville
Councilor Ben West

CITY COUNCIL MISSION STATEMENT

To protect and enhance Wilsonville’s livability by providing quality service to ensure a safe, attractive, economically vital community while preserving our natural environment and heritage.

**Executive Session, Work Session, City Council and Urban Renewal meetings
will be held in the Council Chambers, City Hall, 1st Floor**

- 5:00 P.M. EXECUTIVE SESSION [30 min.]**
A. Pursuant to: ORS 192.660 (2)(e) Real Property Transactions
ORS 192.660(2)(h) Legal Counsel / Litigation
- 5:30 P.M. REVIEW OF AGENDA AND ITEMS ON CONSENT [5 min.]**
- 5:35 P.M. COUNCILORS’ CONCERNS [5 min.]**
- 5:40 P.M. PRE-COUNCIL WORK SESSION**
- A. Wilsonville Community Sharing Support Grant Agreement (Rodocker) [5 min.]
B. Five-Year Action Plan and Annual One-Year Implementation Plan for the
Wilsonville Tourism Development Strategy (Monahan/Ottenad/McCarty) [15 min.]
C. Equitable Housing Strategic Plan (Rybold) [15 min.]
D. Update on Housing Related Grants (Pauly) [20 min.]
- 6:35 P.M. ADJOURN**

CITY COUNCIL MEETING

The following is a summary of the legislative and other matters to come before the Wilsonville City Council a regular session to be held, Monday, June 15, 2020 at City Hall. Legislative matters must have been filed in the office of the City Recorder by 10 a.m. on June 2, 2020. Remonstrances and other documents pertaining to any matters listed in said summary filed at or prior to the time of the meeting may be considered there with except where a time limit for filing has been fixed.

7:00 P.M. CALL TO ORDER

- A. Roll Call
- B. Pledge of Allegiance
- C. Motion to approve the following order of the agenda and to remove items from the consent agenda.

7:05 P.M. MAYOR'S BUSINESS

- A. Placeholder for Appointment
- B. Juneteenth Proclamation
- C. Upcoming Meetings

7:15 P.M. COMMUNICATIONS

- A. Wilsonville Community Sharing (Pamela Woodruff)
- B. Metro "Get Moving" Transportation 2020 Bond Measure Presentation (Tyler Frisbee)

7:45 P.M. CITIZEN INPUT AND COMMUNITY ANNOUNCEMENTS

This is an opportunity for visitors to address the City Council on items *not* on the agenda. It is also the time to address items that are on the agenda but not scheduled for a public hearing. Staff and the City Council will make every effort to respond to questions raised during citizens input before tonight's meeting ends or as quickly as possible thereafter. Please limit your comments to three minutes.

7:55 P.M. COUNCILOR COMMENTS, LIAISON REPORTS AND MEETING ANNOUNCEMENTS

- A. Council President Akervall
- B. Councilor Lehan
- C. Councilor West
- D. Councilor Linville

8:05 P.M. CONSENT AGENDA

- A. **Resolution No. 2814**
Resolution Adopting The Canvass Of Votes Of The May 19, 2020 Primary Election And Amending The Wilsonville Charter. (Veliz)
- B. **Resolution No. 2819**
A Resolution Of The City Of Wilsonville Authorizing Support Grant Agreement With Wilsonville Community Sharing. (Rodocker)
- C. **Resolution No. 2825**
A Resolution Of The City Of Wilsonville Adopting The FY 2020/21 Five-Year Action Plan And Annual One-Year Implementation Plan For The Wilsonville Tourism Development Strategy. (Monahan)

8:15 P.M. NEW BUSINESS

- A. **Resolution No. 2822**
A Resolution Of The Wilsonville City Council Adopting The South Metro Area Regional Transit (SMART) Public Transportation Agency Safety Plan (PTASP). (Loomis/Brashear)

B. Resolution No. 2824

A Resolution Adopting The Letter Of Agreement Between The City Of Wilsonville And SEIU Local 503, OPEU. (Troha/Villagrana)

C. Resolution No. 2826

A Resolution Adopting The Letter Of Agreement Between The City Of Wilsonville And Wilsonville Municipal Employee Association. (Troha/Villagrana)

8:35 P.M. CONTINUING BUSINESS

A. None.

8:35 P.M. PUBLIC HEARING

A. Resolution No. 2820 (Legislative Hearing)

A Resolution Of The City Of Wilsonville Adopting The Equitable Housing Strategic Plan. (Rybold)

B. Resolution No. 2821 (Legislative Hearing)

A Resolution Authorizing A Supplemental Budget Adjustment For Fiscal Year 2019-20. (Rodocker)

9:05 P.M. CITY MANAGER'S BUSINESS

9:10 P.M. LEGAL BUSINESS

9:15 P.M. ADJOURN

INFORMATION ITEMS – No Council Action Necessary.

**AN URBAN RENEWAL AGENCY MEETING
WILL IMMEDIATELY FOLLOW THE CITY COUNCIL MEETING**

Time frames for agenda items are not time certain (i.e. Agenda items may be considered earlier than indicated.) Assistive Listening Devices (ALD) are available for persons with impaired hearing and can be scheduled for this meeting if required at least 48 hours prior to the meeting. The city will also endeavor to provide the following services, without cost, if requested at least 48 hours prior to the meeting: Qualified sign language interpreters for persons with speech or hearing impairments. Qualified bilingual interpreters. To obtain services, please contact the City Recorder, (503) 570-1506 or cityrecorder@ci.wilsonville.or.us.

Resolution No. 2825

Adopting FY 2020/21 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy

Wilsonville City Council Meeting
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EXPLORE
WILSONVILLE.COM
A POCKET (OF FUN)



Tourism Promotion Committee

VOTING MEMBERS FY19/20

Jeff Brown	General Manager of Hotel Eastlund, Portland
Darren Harmon, Chair	General Manager of the Family Fun Center
Al Levit	Former City of Wilsonville Planning Commissioner
Brandon Roben	CEO of Oaks Amusement Park, Portland
Beth Price	Director of Sales and Marketing for Holiday Inn Hotel & Convention Center Portland South/Wilsonville
Rohit Sharma	Owner, RR Hotels Portland LLC (Wilsonville Hilton Garden Inn)

Tourism Promotion Committee

EX-OFFICIO ADVISORY MEMBERS FY19/20

**Clackamas County Tourism and Cultural Affairs,
dba Oregon's Mt Hood Territory**

Samara Phelps, Tourism Development Lead

Washington County Visitors Association (WCVA)

Sylke Neal-Finnegan, Vice President of Marketing &
Communications

Wilsonville Area Chamber of Commerce

Kevin Ferrasci O'Malley, CEO

City of Wilsonville Parks and Recreation Dept

Mike McCarty, Brian Stevenson or Erica Behler

City of Wilsonville City Council Liaison

Councilor Charlotte Lehan

Accomplishments of the Tourism Promotion Committee on Implementing Past Year's FY 2019/20 1/5-Year Action/Implementation Plan

Selection of a new Destination Marketing Consultant – JayRay

- 1. Contract signed December 2019**
- 2. Excellent social media content, website updates and program review were conducted in Q1 of 2020**

Activities of the Tourism Promotion Committee on Implementing Past Year's FY 2019/20 1/5-Year Action/Implementation Plan

Tourism Promotion Grant Programs

- 1. City's Community Tourism Matching Grant Program — *On hold***
- 2. Clackamas County Wilsonville Community Partnership Program — *On hold***

'Explore Wilsonville' Tourism Promotion Special Project: FY19/20 Study of Multi-use Facility with Potential Hotel Addition



'Explore Wilsonville' Tourism Promotion and Destination Marketing Services Plan

JayRay Ads & PR, LLC



Tourism Promotion Committee on Upcoming FY 20/21 1/5-Year Action/Implementation Plan

Updated Scope – Response to COVID-19

July – December 2020 – Low Activity

January – March 2021 – Ramp Up

April – June 2021 – New Normal

Tourism Promotion Committee on Upcoming FY 20/21 1/5-Year Action/Implementation Plan

Tourism Promotion Focus

- 1. Increase Social Media & Followers**
- 2. Targeted Social Media Campaign**
- 3. “Why Wilsonville”**
- 4. Narrow Pocket trips and link to
Wilsonville**

'Explore Wilsonville' Tourism Promotion Website – ExploreWilsonville.com

EXPLORE WILSONVILLE

NAVIGATION: HOME | ABOUT | A DRINK | GET HERE

REQUEST A POCKET GUIDE **HERE**

DOORNAV BUS TRAVEL...ADVISORY >

Stay in the heart of it all—just 16 miles south of Portland. Discover travel the Wilsonville way.

PLAN YOUR TRIP >

FEATURED EVENT
Bullwinkle's Terrific Tuesdays
 May 19th 12:00 pm-1:00 pm
 \$20
 Bullwinkle's Entertainment >

FEATURED PACKAGE
5-Course dinner plus breakfast in bed for two
 Holiday Inn Portland South Hotel >

FEATURED BLOG
Stay in the heart of it all—Wilsonville, Oregon.
 Planning your getaway is easy with our 5-Pocket Trip... >

SEE ALL EVENTS > | SEE ALL PACKAGES > | SEE ALL BLOG POSTS >

WILSONVILLE OREGON POCKET TRIPS

POCKET TRIPS | LODGING | DINING | EVENTS

PLAN YOUR FUN. THEN SHARE IT.

#ExploreWilsonville

Be the first to hear about new Pocket Trips & cool stuff happening around here! Your personal information and email address is safe with us. We promise to not share your information with anyone.

First name* Last name*

Email*

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OUR PARTNERS

WILSONVILLE OREGON
 Tualatin Valley
 MOUNT HOOD REGIONAL

STAY
 Hotels & Motels
 Camping & RV Parks
 Vacation Rentals
 Bed & Breakfasts

EAT & DRINK
 Restaurants
 Wineries
 Breweries
 Coffee & Tea
 Bars & Nightlife

EXPLORE
 Pocket Trips
 Events

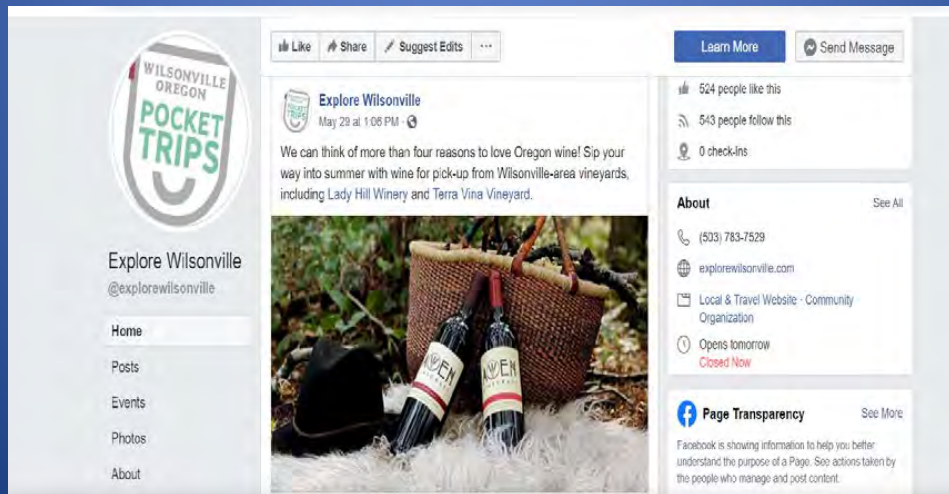
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'Explore Wilsonville' Tourism Promotion Social Media



'Explore Wilsonville' Tourism Promotion

Local Day-Long 'Pocket Trips'...with Wilsonville as Overnight Lodging Location

"in the middle of it all"



Resolution No. 2825

Adopting FY 2020/21 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy

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Equitable Housing Strategic Plan

City Council Work Session
June 15, 2020





Updates in Final Draft

- New action and additional considerations
- Expanded *Steps for Implementation* chapter
- Spotlight information
- CET roadmap
- COVID context



Wilsonville Equitable Housing Strategic Plan

June 15, 2020

Resolution No. 2820





Planning Commission Hearing

- Recommended adoption of Wilsonville Equitable Housing Strategic Plan
- Discussed formation of equity/inclusion committee



CITY COUNCIL MEETING STAFF REPORT

Meeting Date: June 15, 2020		Subject: Update on Housing Related Grants	
		Staff Member: Daniel Pauly, AICP, Planning Manager	
		Department: Community Development	
Action Required		Advisory Board/Commission Recommendation	
<input type="checkbox"/> Motion <input type="checkbox"/> Public Hearing Date: <input type="checkbox"/> Ordinance 1 st Reading Date: <input type="checkbox"/> Ordinance 2 nd Reading Date: <input type="checkbox"/> Resolution <input type="checkbox"/> Information or Direction <input checked="" type="checkbox"/> Information Only <input type="checkbox"/> Council Direction <input type="checkbox"/> Consent Agenda		<input type="checkbox"/> Approval <input type="checkbox"/> Denial <input type="checkbox"/> None Forwarded <input checked="" type="checkbox"/> Not Applicable	
		Comments: N/A	
Staff Recommendation: N/A			
Recommended Language for Motion: N/A			
Project / Issue Relates To:			
<input checked="" type="checkbox"/> Council Goals/Priorities: A.6e. Engage the Community on Important Issues D.1. Complete the Equitable Housing Study and develop affordable housing strategies		<input checked="" type="checkbox"/> Adopted Master Plan(s): Frog Pond West Master Plan Frog Pond Area Plan	
		<input type="checkbox"/> Not Applicable	

ISSUE BEFORE COUNCIL:

Update on grant awards from the Oregon Department of Land Conservation and Development (DLCD) and Metro related to planned housing work.

Update on Housing Related Grants Staff Report

Page 1 of 4

EXECUTIVE SUMMARY:

On June 15, the Council will hold a public hearing on the Equitable Housing Strategic Plan, which includes a number of implementation actions. The City recently received notice of the award of over \$500,000 of grant funding from the State of Oregon and Metro to support two of the high priority implementation actions from the plan, 1B: Incorporate Equitable Housing Needs into Middle Housing Planning and IC: Define Equitable Housing Approaches in New Urban Growth Areas. The grant applications requesting this funding highlighted the interrelatedness of the Equitable Housing Strategic Plan, the House Bill 2001 compliance middle housing work, and Frog Pond East and South master planning of a new urban growth area as a package of efforts to further equitable housing in Wilsonville. Staff is pleased with the State of Oregon and Metro's financial support of the City's equitable housing work.

The largest award of \$350,000 is from Metro, the full amount requested, for master planning Frog Pond East and South. Key aspects of the master planning that will directly deal with equitable housing include:

- Extensive outreach to better understand housing needs;
- An affordable housing opportunities and restraints study, and area specific implementation strategies;
- Exploring encouraging more ADU's in the expansion area;
- Implementing middle housing concepts from House Bill 2001 compliance work;
- Exploring variable SDC options.

Beyond housing, the master planning work will also focus on providing the quality infrastructure and parks and open space Wilsonville values consistent with the Frog Pond Area Plan.

The next award of \$100,000 is from DLCD, compared to \$115,000 requested, for assistance in implementing House Bill 2001 passed by the legislature in 2019. The House Bill and related administrative rules requires the allowance of duplexes on each residential lot that allows single-family homes and the allowance of other middle housing such as row houses, triplexes, and quadplexes in all residential areas of the City. The City will need to audit development code and plans, and update as necessary to comply with the new state requirements. The state law and rules allow some level of siting and design standards which the City will also need to develop as part of this work. As scoped, these design options will receive input from the community as well as non-profit developers to ensure they do not negatively affect affordability. The award of this grant is notable as it will reduce demand on the City's General Fund during the fiscal year 2020-2021 by the full amount of the grant.

The final award of \$81,200 is from Metro, the full amount requested, to support the City working with a community partner to bring the Latinx community into the discussion on housing. The first engagements will be concerning the siting and design standards for middle housing as part of the House Bill 2001 compliance work. The Equitable Housing Plan particularly points out Latinx families will be an increasingly important group seeking housing options in Wilsonville, so this demographic, while often underrepresented in the feedback on planning projects, is critical to involve in discussions around planned future housing. Following the House Bill 2001 work, the proposed project strives to establish long-term relationships and a framework for ongoing

involvement of the Latinx community in decision-making in Wilsonville. Specifically, the City will leverage the relationships and framework during the Frog Pond East and South master planning outreach effort.

Attached you will find narratives from each grant application, which discusses the planned projects in more detail along with planned timelines and outcomes.

EXPECTED RESULTS:

Council is informed of the status of grant applications for which staff previously requested their support well as the work planned to carry forward implementation actions from the Equitable Housing Strategic Plan.

TIMELINE:

Work on the House Bill 2001 compliance project is beginning this summer and work on Frog Pond East and South will begin in early 2021.

CURRENT YEAR BUDGET IMPACTS:

The 2020-2021 Adopted Budget included \$119,000 for professional services in support of House Bill 2001 compliance. The \$100,000 DLCDC grant will cover most of this amount otherwise coming from the City's General Fund. The Frog Pond grant will reduce demand on City funds in future years. The CIP shows \$399,000 in future years for Frog Pond planning, much of which will now be funded externally rather than through City funds. The City's match for the various grants will be in the form of staff time covered by existing personnel services budgets.

FINANCIAL REVIEW / COMMENT:

Reviewed by: CAR Date: 6/10/2020

LEGAL REVIEW / COMMENT:

Reviewed by: ARGH Date: 6/10/2020

COMMUNITY INVOLVEMENT PROCESS:

The proposed projects include significant community involvement to educate Wilsonville residents and stakeholders about the regulatory requirements and benefits of housing variety from an economic development and social equity perspective, as well as gather input on what is important in housing design and neighborhood character. As mentioned above, it will include extensive targeted outreach to the Latinx community and a framework for how the City's engagement efforts can be more inclusive.

POTENTIAL IMPACTS OR BENEFIT TO THE COMMUNITY:

The grant funds will help enable two high priority implementation actions for the Equitable Housing Strategic Plan to further equitable housing in the community.

ALTERNATIVES:

N/A

CITY MANAGER COMMENT:

N/A

ATTACHMENTS:

1. Frog Pond East and South Application Narrative Submitted to Metro
2. House Bill 2001 Planning Assistance Grant Application Narrative Submitted to DLCD
3. Latinx Community Engagement Grant Narrative Submitted to Metro

2040 Planning and Development Grant Application | Comprehensive Planning

Project: Master Plan Frog Pond East and South Neighborhoods

Funds requested: \$350,000

Project purpose and need

1. Identify the urban growth boundary expansion area to be comprehensive planned and outline any Metro Council conditions of approval that relate to the comprehensive planning process, including the amount of dwelling units or jobs or other specific facilities to be accommodated in the expansion area.

The Advance Road Expansion Area, also known as Frog Pond East and South, will fill a vital housing need for Wilsonville and the region. The City envisions vibrant, well-connected neighborhoods with a variety of high-quality housing. Laying the foundation for success of this area is a major undertaking, and the City needs the support of the region to accomplish the task in the best possible way.

The project will provide the regulatory framework and essential analysis needed to develop a Master Plan for development of this area added to the Metro Urban Growth Boundary by Ordinance No. 18-1427. Conditions of Approval to this ordinance require the plan to provide at least 1,325 dwelling units, consistent with the adopted concept plan. In addition, the project will address other Conditions of Approval such as:

- Allowing residential unit types consistent with Condition of Approval A.3. and Oregon House Bill 2001;
- Exploring ways to encourage construction of ADU's;
- Implementing relevant policies of the 2014 Climate Smart Strategy related to location of density, increasing transit use, and increasing active transportation options;
- Providing affordable housing;
- Providing services and infrastructure consistent with Metro Code Section 3.07.1120 (c); and
- Exploring alternative SDC methodologies.

Proposed scope of work

2. Provide a [bulleted list outline](#) of the [major project elements and deliverables](#) needed to meet the requirements of Metro Code Section 3.07.1120 Planning for Areas Added to the UGB. Briefly describe the [scope for each phase, key deliverables](#) and general timeframe to complete the project.

General Timeframe: City staff will finalize the IGA process with Metro by the end of the year in order to establish a contract and scope of work with a consultant in early 2021. Preliminary background work will be completed in the first half of 2021, with the intent to launch to the public in late summer. Adoption by City Council will occur in Fall 2022. The SDC exploration may extend to later in 2022 or early 2023, as it will apply citywide.

PROJECT SCOPE

Phase 1: Background Research and Project Setup

The two main elements of this phase include background research and outreach setup. The background research will involve a professional analysis of opportunities and constraints for development of residential neighborhoods that builds on analysis completed for the 2015 Frog Pond Area Plan with a specific focus on community context and regulatory changes since then. The background research will also review all applicable compliance requirements. The memo delivered by this phase will be a key reference document throughout the project.

The project will use a wide array of innovative tools to maximize the outreach effort. The first step is to identify outreach needs and strategies, which will be used throughout the project. Rather than identify specific actions beforehand, the City will engage innovative public involvement professionals to develop

Attachment 1 Frog Pond East and South Application Narrative Submitted to Metro

tailored strategies within a generous budget to best target the intended audiences. The City will also leverage relationships and outreach framework established with the Latinx community during previous work supported by a Metro Community Engagement Grant. The outreach component of this project is a great opportunity to continue to engage the Latinx community, a growing demographic in the future of Wilsonville and its residential neighborhoods. Outreach will commence in Phase 1, but will be ongoing with numerous tasks and deliverables in subsequent phases.

Project Element: Background Research

Key Deliverables/Tasks:

1. Opportunities and constraints and regulatory compliance memo

Project Element: Outreach Scoping and Initial Outreach

Key Deliverables/Tasks:

1. Community engagement plan, including outreach needs analysis and strategy recommendations, tailored to, at least, the following audiences:
 - a. Latinx community
 - b. Other historically marginalized communities of color
 - c. High school age youth
 - d. Young adults
 - e. People with disabilities
 - f. Lower income residents
 - g. Older adults
2. Outreach groundwork and initial outreach

Phase 2: Land Use & Community Design

Efforts to define land use and community design is a major phase of the project. The City anticipates about 75% of outreach work will occur in this phase, which includes refining the type of housing in the project area. One project element specifically analyzes the need for, and identifies and implements strategies related to, affordable housing. Another element considers the market for and barriers to ADUs with an outcome of updating policy and codes to further encourage this housing option. A third project element evaluates the middle housing product mix, particularly in an area designated for this housing type in the Frog Pond Area Plan, and establishes the unit count (density) ranges for areas envisioned for primarily single-family. Finally, the phase will take a closer look at the nature, location, and design of an envisioned neighborhood commercial area.

Lastly, this phase also plans for various components of the public realm such as street trees, street lights, parks, trails, monuments and signs, and preserving existing significant trees that are critical to placemaking and building cohesive neighborhoods.

Project Element: Affordable Housing Analysis

Key Deliverables/Tasks:

1. Affordable housing opportunities and constraints memo addressing strategies in Wilsonville's Equitable Housing Strategic Plan and conditions in the UGB Expansion Conditions of Approval
2. Expansion-area analysis of affordable housing needs and production strategies.
3. Select and implement strategies, as applicable

Project Element: Explore Encouraging ADU's

This phase explores encouraging more production of ADU's in the expansion area.

Key Deliverables/Tasks:

1. Market analysis for ADUs based on local development standards
2. Memo summarizing barriers and suggested actions to address barriers

Attachment 1 Frog Pond East and South Application Narrative Submitted to Metro

3. Package of code updates or policies, as applicable, to encourage more ADUs, specific to the expansion area and citywide, draft and final

Project Element: Residential Sub-districts and Unit Count Ranges

Key Deliverables/Tasks:

1. Define sub-districts and unit count range based on Frog Pond Area Plan using similar methodology as Frog Pond West (table and map format), draft and final
2. Memo summarizing evaluation of middle housing mix alternatives and preferred middle housing mix
3. Develop lot and other development standards for middle housing to be incorporated into the RN zone standards, and prepare other updates to RN zone as necessary, draft and final
4. Provide three block-level site studies resulting in sketches of potential development examples

Project Element: Neighborhood Commercial Area Evaluation

Key Deliverables/Tasks:

1. Review and provide memo summarizing discussions and information in Frog Pond Area Plan regarding neighborhood commercial
2. Conduct market analysis for neighborhood commercial area
3. Memo describing evaluation of alternative locations and layouts and identifying Placemaking/urban design analysis and recommendation
4. Identify required placemaking elements for neighborhood commercial area and preliminary sketches/designs
5. Sketch of potential neighborhood commercial
6. As necessary, develop additional development standards for commercial to be incorporated into the RN zone standards, draft and final

Project Element: Public Realm

Key Deliverables/Tasks:

1. Street Demonstration Plan and corresponding cross-sections
2. Park implementation and location study
3. Street tree plan
4. Public lighting plan
5. Guidelines for monuments and signs
6. Trail plan
7. Tree preservation strategy memo

Project Element: Outreach (Phase 2)

Tasks and deliverables for this phase of outreach will be determined during Phase 1 analysis and recommendations and modified as needed to reach a diverse cross-section of stakeholders and community members.

Phase 3: Implementation Strategies and Documents/Adoption

This phase will produce key project elements to guide implementation as well as adopt the plan and its various elements. First, one project element will refine and build upon infrastructure planning work completed as part of the Frog Pond Area Plan and identify funding mechanisms. This work will review and carry forward the applicable elements from Frog Pond West Master Plan to ensure the cohesive neighborhood approach envisioned by Frog Pond Area Plan. The phase will also explore different SDC methodology and rate options, including variations based on type and size of housing unit. The final project element involves adoption, the culmination of all tasks outlined above. It adopts the master plan, RN Zone updates, and other related elements, and produces necessary compliance reports and findings. The phase includes City Council and Planning Commission work sessions and hearings in order to get to final adoption by Ordinance.

Project Element: Infrastructure Plan and Funding Strategy

Key Deliverables/Tasks:

1. Review and refine preliminary infrastructure information from Frog Pond Area Plan specific to Frog Pond East and South
2. Meetings with property owners/developers
3. Frog Pond East and South Infrastructure Funding Strategy, modeled after the adopted Frog Pond West strategy, draft and final

Project Element: Explore SDC Options

Key Deliverables/Tasks:

1. Memo reviewing current policies
2. Stakeholder meetings
3. Alternatives memo, draft and final
4. SDC code and policy language, draft and final, as necessary

Project Element: Regulation Adoption and Compliance Reports

Key Deliverables/Tasks:

1. Master plan document and report
2. Final amendments (Comprehensive Plan and Zoning text) and maps as determined through Phase 2 of the project
3. Outreach memos and reports
4. Master Plan Findings Report including Statewide Planning Goals, Transportation Planning Rule (TPR) findings, Metro Title 11, and Significant Resource Overlay Zone (SROZ) ESEE analysis

Project Element: Outreach (Phase 3)

Tasks and deliverables for this phase of outreach will be determined during Phase 1 analysis and recommendations and modified as needed to reach a diverse cross-section of stakeholders and community members.

Project manager

3. Describe the skills and experience of the lead staff person who will manage all aspects of the grant project and oversee the project team’s collaboration and consultant work.

The lead City staff person/project manager is Daniel Pauly, AICP, Planning Manager at the City of Wilsonville. Employed by the City since 2008, Daniel has a thorough understanding of the City’s policies and approach to master planning and implementation. He managed the land use entitlements for a large portion of and an amendment to the Villebois Village Master Plan, as well as provided local expertise for several components of the Frog Pond Concept Plan and Frog Pond West Master Plan. As project manager, Daniel has lead several in-house code updates including to the sign code, for compliance with updated ADU requirements, and to modernize residential zoning standards. Most notably, he managed an update for the City’s Old Town Neighborhood including adoption of clear and objective residential design standards.

Daniel has successfully managed consultant teams to reach project objectives on-time and on-budget. He has extensive experience managing and engaging multi-disciplinary teams involving City and partner agencies such as the West Linn-Wilsonville School District and Tualatin Valley Fire and Rescue (TVF&R). Daniel has strong relationships with key individuals within the City and partner agencies.

Project partners and roles

4. Clearly describe the roles and responsibilities of each of the key project partners. Describe the level of commitment from service providers to meet the goals of the project.

Primary project partners include a variety of City Departments, as well as the West Linn-Wilsonville School

Attachment 1 Frog Pond East and South Application Narrative Submitted to Metro

District and TVF&R. City Department partners include SMART Transit, Parks and Recreation, Engineering, Public Works, Legal, Finance, and others. Affordable housing providers will also be key partners engaged in the project.

- City Departments were fully engaged in the Frog Pond Area Plan and will be part of the project team for the Frog Pond East and South Master Plan project.
- TVF&R is a strong partner who has collaborated on important projects including new growth area plans.
- West Linn-Wilsonville School District has long included this area in their capacity planning. The southern portion of the expansion area surrounds Meridian Creek Middle School, which opened in 2017 and has capacity for students from the expansion area. In November 2018, voters approved a bond measure which addressed capacity at both the primary school and high school level. The bond included funds to build a new primary school in Frog Pond West and to open an expanded Arts and Technology High School in the district, freeing up additional capacity at Wilsonville High School. The school district has historically, and will continue to, collaborate as part of the City's planning efforts on safe routes to school and other school related matters. The school district has also been a strong partner for outreach to youth during the Town Center Plan, and this outreach partnership will continue with this project.
- Over the years the City has developed partnerships with affordable housing providers, such as Northwest Housing Alternatives. Existing partnerships have been strengthened and new partnerships forged as part of the City's Equitable Housing Strategic Plan. These housing partners have expressed interest in Wilsonville and will be engaged as part of this Master Planning project. In particular, they will be engaged in the affordable housing analysis, and exploring SDC options. Other community partners who serve community members with specific needs, such a health and community service providers, will also be engaged in these project elements.
- Business interests, including the Chamber of Commerce and the Homebuilders Association, will also be engaged in project elements. The Chamber will be specifically involved in helping to plan the neighborhood commercial area.

Community engagement

5. Describe how the community engagement strategy will utilize best practices to meaningfully engage neighbors, property owners, key stakeholders and historically marginalized communities. Specifically describe your approach for advancing racial equity and involving communities of color in the planning process. Provide examples the city has used or is currently using to meaningfully involve diverse community members in planning processes.

Wilsonville has experience with a wide variety of traditional and innovative tools to ensure meaningful community engagement. One lesson staff has learned is that innovative and opportunistic approaches not contemplated at the beginning of the project are often the most effective. A key member of the consultant team will be a community engagement expert who will help identify specific needs and opportunities, then implement the strategies throughout the project to maximize outreach effectiveness and impact.

The City's recurring events, resources, and partnerships will be utilized to promote the project and engage the community. One example is the annual "Community Block Party" that provides access to thousands of residents from diverse backgrounds. Other regular events include farmers markets and community festivals in parks. Another opportunity is through the City's well-publicized and established online community outreach portal "Let's Talk, Wilsonville!" This online resource includes surveys of various types and opportunities for community members to tell stories, among others tools. The City hopes to leverage existing partnerships with schools will help reach youth and Latinx families. In addition, Wilsonville is seeking funding through another Metro Community Engagement grant to develop strong partnerships with the Latinx community. During the Wilsonville Town Center Plan project the City build some relationships, including through a local business owners of "La Tienda San Francisco". The Community Engagement Grant will enable the City to have robust and targeted outreach to the Latinx community during the City's House Bill 2001 compliance project. In addition, the Engagement Grant proposes to continue engagement after the project to build long-term relationships with the Latinx community which will pave the way for the Latinx community to be involved in this project, building on conversations about housing that will be started through this previous work.

Proposed project budget

6. Use the budget table template provided to show the estimated project costs by major phase or element. The budget table should reflect the bulleted outline provided in #2. Indicate estimated cost for consultant work as well as other direct project expenses. In the space below, describe the methodology used for estimating project costs, and identify any additional funds (if any) that have been pledged by project partners or other sources.

Grant Funds Requested: \$350,000

Other Pledged Funds: \$190,000

Methodology: Staff used the following methodologies to determine costs:

- Where a task is similar to that of the Frog Pond West Master Plan, the consultant cost is based on the actual amount billed for the similar task, adjusted according to relative complexity compared to Frog Pond West. Contingency and miscellaneous direct expenses are based on similar costs for the Frog Pond West Master Plan.
- For certain tasks not similar to one in the Frog Pond West Master Plan, but that would be performed by similar consultants, consultant cost is based on estimated hours to complete the task multiplied by hourly rates similar to Frog Pond West.
- For affordable housing analysis and exploration of SDC's, staff estimated consultant costs of tasks based on similar tasks performed for the Equitable Housing Strategic Plan.
- For outreach, staff reviewed consultant costs from a number of public engagement components of projects including the Wilsonville Town Center Plan, Frog Pond Area Plan, and Equitable Housing Strategic Plan, and added a generous amount to pursue innovative and effective outreach strategies, translations services, and partnerships with potential community liaisons, as recommended through the outreach needs analysis and recommended strategies.
- Staff time (other direct project costs) is based on actual costs for the Frog Pond West Master Plan adjusted for additional project components and a high level of outreach effort.

Wilsonville 2019-21 Planning Assistance Direct Grant Application Narrative

A. Goals and Objectives.

The proposed project helps the City of Wilsonville meet the mandates of House Bill 2001, but also goes beyond meeting the minimum requirements of state law, seeking to provide a variety of units of quality design at affordable price points and with broad community support. A primary focus will be on new urban areas as the City sees the most opportunity to affect housing variety here. In the Frog Pond Planning Area alone, the project will potentially affect over 1,800 housing units. The project will provide hearings-ready documents for compliance including comprehensive plan and development code updates, updated master plans, and design standards, but also will be an integral part of continuing the City's work to address affordable housing concerns in Wilsonville.

The project will be a key link between two other City projects to address pressing housing issues: the Equitable Housing Strategic Plan (currently in the adoption process) and the Frog Pond East and South Master Plan, which has a planned adoption for fall 2022 after this proposed middle housing project is complete. Both these projects are currently, or anticipated to be, funded by City resources and/or Metro grant funds from the regional construction excise tax.

Wilsonville has a long history of implementing a variety of housing types and aims to continue this effort. Much of the City already has a zoning allowance for a variety of housing, including duplexes and middle housing. With this broad zoning allowance, the market has produced a greater variety of housing than many Metro suburbs, with the majority of the City's housing supply being multi-family units. As of March 1, 2020 Wilsonville's housing stock was 50% multi-family, 41% single-family (12 of which have ADU's), 7.8% middle housing, and 1.2% mobile homes. Geographically, this variety in housing types is well-distributed across the city and close to services. While the City's code already enables a wide variety of middle housing types, the project can further enhance the housing variety in the community. The project goes beyond a code audit and any needed updates to include additional efforts aimed at not just allowing but encouraging construction of more middle housing, and to do so at more affordable price points.

B. Products and Outcomes.

Product 1 (approx. 30% project costs)

Audit/Updates to Comprehensive Plan, Development Code, and Legislative Master Plans

Expected Outcome

Identification of regulatory barriers to duplex and middle housing development and needed updates for regulatory compliance, guidance and recommendations on how to remove barriers and come into compliance with House Bill 2001 and implement strategies from Wilsonville's Equitable Housing Strategic Plan. A package of usable policies and code edits to meet regulatory requirements within Wilsonville's unique context.

Anticipated Significant Effects

The updates are anticipated to have a particularly significant effect in the Frog Pond new urban area where they have the potential to impact the development of approximately 1800 homes. The updated master plan and code will expand housing variety in Frog Pond West, an area planned as predominantly single-family, as well as help set the stage for regulations in Frog Pond East and South,

the expansion area recently added to the Urban Growth Boundary. The City further anticipates the impact on housing variety to influence the diversity and livability of neighborhoods. The diverse housing types will help create a neighborhood of diverse household types and diverse income levels. It will help include households in the neighborhoods that would have otherwise been excluded due to cost and lack of appropriate housing type, leading to significantly supporting equitable housing efforts.

Product 2 (approx. 10% project costs)

Public Facility and Infrastructure Planning Updates to Ensure Capacity for Added Housing

Expected Outcome

Conduct analysis of likely redevelopment rates and assumptions for growth. Report/memo with information to plan for and anticipate infrastructure needs as housing mix changes from what was originally planned for in the various neighborhoods in the city, particularly the Frog Pond urban growth area. Critical information to conduct future updates to various infrastructure master plans.

Anticipated Significant Effects

Having a full view of public facilities and their interaction with additional housing will ensure development of middle housing can occur with infrastructure provided in a cost-effective manner and adequate to ensure livability. Ensuring infrastructure isn't a barrier in regards to cost or availability will have a significant effect on the production of middle housing adding housing variety to neighborhoods. The additional housing variety in these neighborhoods will then have a significant effect on providing housing for a variety of household types and income levels, significantly supporting equitable housing efforts.

Product 3 (approx. 60% project costs)

Siting and Design Standards for Duplexes and Middle Housing and Related Outreach

Expected Outcome

Duplex and middle housing design options that have community support, create quality design and compatibility with a variety of housing types on a street and in a neighborhood, do not add significant costs to the project/home, and are likely to be built by the private market.

Anticipated Significant Effects

The City anticipates the new design standards to have a particularly significant effect in the Frog Pond new urban area were they have the potential to impact approximately 1800 units. In addition, the new design standards will provide a clear path for infill projects throughout the City. The City anticipates the design standards will provide clear and objective standards to enable streamlined approval of middle housing.

C. Work Program, Timeline & Payment.

1. Tasks and Products:

Product 1: Audit/Updates to Comprehensive Plan, Development Code, and Legislative Master Plans

Steps to Create Product 1:

1. Become familiar with/review regulatory issues driving audit and updates;
2. Audit Comprehensive Plan, Development Code, and legislative master plans;

3. Review Audit findings;
4. Review how updates impact density and density calculations;
5. Develop preliminary Comprehensive Plan, Development Code, and legislative master plan updates;
6. Public outreach;
7. Review preliminary updates;
8. Develop final hearings-ready updates;
9. Write and review regulatory findings.

Product 1 Tasks/Subtask for Consultants:

1. Memo summarizing regulatory issues;
2. Written audit of Comprehensive Plan, Development Code, and legislative master plans;
3. Memo explaining draft recommendations;
4. Related public outreach;
5. Comprehensive Plan, Development Code, and legislative master plan updates;
 - Preliminary drafts (minimum 3)
 - Final hearings-ready draft
6. Regulatory findings, draft and final;

Product 1 Tasks/Subtasks for City:

1. Review of consultant deliverables;
2. Related public outreach;
3. Project management.

Product 2: Public Facility and Infrastructure Planning Updates to Ensure Capacity for Added Housing

Steps to Create Product 2:

1. Have consultants who worked on facility and infrastructure master plans review their findings and integrate new assumptions to consider additional housing units that could occur from middle housing code updates;
2. Review results;
3. Create list of any recommended updates to facility and infrastructure master plans needed to accommodate these additional housing units.

Product 2 Tasks/Subtask for Consultants:

1. Review of existing infrastructure and facility master plans to ensure adequate capacity exists for additional housing units that could occur from middle housing code updates.
 - o Review of findings, assumptions, system plans, and other relevant points;
 - o Brief memos stating findings of reviews and any recommendations for system upgrades and updates to facility and infrastructure master plans.
 - Drafts (minimum 2) to discuss with City staff and final.

Product 2 Tasks/Subtasks for City:

1. Review of results of consultants' reviews;
2. Consolidate any recommended updates into single document to guide future updates to facility and infrastructure master plans.

Product 3: Siting and Design Standards for Middle Housing*Steps to Create Product 3:*

1. Review scope of product;
2. Conduct background research on existing development code as well as best practices for middle housing siting and design standards;
3. Extensive public outreach with visual preference surveys comparing design options and site layouts for each middle housing type;
4. Preliminary siting and design standards for each middle housing type based on outreach;
5. Additional public outreach;
6. Revised design standards for public work sessions;
7. Final hearing-ready design standards;
8. Write and review regulatory findings.

Product 3 Tasks/Subtask for Consultants:

1. Review scope/background research;
2. Public outreach materials including, but not limited to:
 - Visual preference photos
 - Site studies showing site layout options for each middle housing type;
 - Architectural renderings showing options for each middle housing type;
 - Meeting handouts and materials
 - Survey materials;
3. Public outreach participation;
4. Design standards
 - Preliminary draft
 - Updated draft (minimum 2)
 - Final hearings-ready draft;
5. Regulatory findings.

Product 3 Tasks/Subtasks for City:

1. Review of consultant deliverables;
2. Public outreach participation;
3. Project management.

2. Timeline:

Tentative Start Date: June 2020

Product 1: Audit/Updates to Comprehensive Plan, Development Code, and Legislative Master Plans

June 2020-January 2021

- Regulatory issues review and Audit: August 2020
- Preliminary Comp. Plan, Dev. Code, and policy updates: September 2020

- Density review: September 2020
- Draft recommendation memo for work sessions: October 2020
- Legislative master plan revision report: December 2020
- Amendments for public work sessions January-March 2021
- Hearings-ready Comp. Plan amendments Spring 2021
- Hearings-ready Dev. Code amendments Spring 2021
- Regulatory findings April 2021

Product 2: Public Facility and Infrastructure Planning Updates to Ensure Capacity for Added Housing

Fall 2020-March 2021

- Review of Plans/Assessments: Fall 2020
- Review Results of Reviews/Assessments: Nov/Dec 2020
- Recommendation Memos: January 2021
- Review and finalize Memos: February/March 2021

Product 3: Siting and Design Standards for Middle Housing

June 2020-June 2021

- Review scope/background research: June 2020
- Outreach, including targeted Latinx community outreach funded by Metro grant (applying for, not awarded): Fall 2020-May 2021
- Draft Design Standards: December 2020
- Site Studies: February 2021
- Architectural Renderings (12): February 2021
- Hearings-ready Design Standards: June 2021

3. Payment Schedule:

January 2021 - \$46,000

June 2021 - \$69,000

D. Evaluation Criteria.

Wilsonville is a jurisdiction required to comply with House Bill 2001 by June 30, 2022. This project will lead to hearings-ready Comprehensive Plan, Development Code, and legislative master plan updates, as applicable, while continuing to lay the groundwork for successful implementation of middle housing. Below you will find responses to the specific evaluation criteria listed in the grant application packet.

1. Project Objectives

The project objectives and expected outcomes are as follows:

- Hearings-ready adoption package for amendments to Comprehensive Plan, Development Code, and legislative master plans;

- Public facility and infrastructure planning updates to ensure capacity for added housing;
- Hearings-ready siting and design standards for middle housing;
- Meaningful outreach to and input from under-represented communities, particularly the Latinx community as this community is projected to be a significant growing portion of Wilsonville residents.

The project objectives and outcomes further statewide planning goals. Specifically, the project includes public outreach in support of Goal 1. The adoption of the amendments will follow procedures consistent with Goal 2 and decisions will be made on factual information. The changes will apply to existing buildable lands and thus continue to preserve agricultural lands, open spaces, and natural areas while focusing on land identified for urbanization consistent with Goals 3, 5, and 14. The City anticipates the project to enable a significant variety of housing, consistent with Goal 10. Wilsonville has a significant jobs base and the added variety of housing supported by this project can provide additional workforce housing in support of the economy and Goal 9. The project includes components to understand the impact on public facilities and transportation to ensure Goals 11 and 12 continue to be met or are furthered.

2. Program Priorities

The project focuses on House Bill 2001 priorities for jurisdictions required to comply by June 30, 2022 by creating hearings-ready recommendations for Comprehensive Plan, Development Code, and legislative master plan amendments. All work funded by the grant will conclude by June 2021. However, certain project components will continue after June 2021 using City and/or Metro grant funding.

3. Project Description

The City prepared a detailed project description. The description defines the approach, budget, products, and timing for each task. The City based each on experience with similar projects and has a high level of confidence the project will achieve the objectives set forth.

4. Grantee Capacity

The City of Wilsonville has extensive experience managing grants from the State as well as Metro. A few recent examples include the Wilsonville Town Center Plan, Frog Pond West Master Plan, Equitable Housing Strategic Plan, and Industrial Form Based Code for Coffee Creek Industrial Area. This project fits nicely between the Equitable Housing Strategic Plan and the housing-focused Frog Pond East and South Master Plan. The City has anticipated this project in its 2020-21 work program ensuring adequate staffing for project management and support.

5. Leverage

The City is planning \$60,000 of staff time for the project. In addition, the City is seeking \$81,200 in funding from Metro to support additional outreach to the Latinx community for the proposed middle housing project and Frog Pond East and South master planning. City and Metro commitments are anticipated to exceed the amount of the grant award from the State; thus, greatly amplifying the State funds dedicated to this project.

E. Project Partners.

Wilsonville prides itself on being a leader as well as a collaborator. With its unique history of housing variety, Wilsonville is uniquely positioned to take on this project. While Wilsonville desires to pursue this project to address housing issues in its unique context, the project benefits will extend beyond Wilsonville. The City has a history of strong relationships with Clackamas County, Washington County, DLCD, Metro, West Linn-Wilsonville schools, the Homebuilders Association, and local organizations such as the Chamber of Commerce and Wilsonville Community Sharing. Wilsonville has requested \$81,200 in Metro grant funding for a portion of the public outreach related to this project. In addition, the project is a key link in a series of projects, most of which are funded or are anticipated to be funded through Metro grants. These projects include Equitable Housing Strategic Plan currently under way, the Frog Pond West Master Plan completed in 2017, and the upcoming master planning for Frog Pond East and South, which was added to the Metro UGB in 2019. In addition, the City will invite Metro and the counties, among others, to be technical advisors on the project. Wilsonville recognizes this work will occur concurrently with ongoing related efforts at DLCD and aims to regularly collaborate with DLCD staff during the project to ensure concurrent projects inform each other.

F. Advisory Committees.

Wilsonville's Planning Commission will be the primary advisory committee. Unlike other jurisdictions, the Planning Commission only focuses on legislative policy matters with the Development Review Board conducting quasi-judicial land use review. Wilsonville's Planning Commission is uniquely qualified to handle a large project such as this. Many of the commissioners have experience working on the City's Development Review Board, including reviewing a variety of housing, particularly in Villebois. The Commission represents a cross section of viewpoints in Wilsonville and serves as the designated Committee for Citizen Involvement (CCI), a role they take seriously. The Commission has served as the advisory committee and hosted public engagement events as the CCI on a number of major projects in recent years including Frog Pond planning efforts, the Wilsonville Town Center Plan, and the I-5 Pedestrian Bridge project. The Planning Commission anticipates at least six work sessions outside the formal public hearing process. In addition, the Planning Commissioners regularly attend or host the public events associated with a project and assist in public outreach.

G. Cost-Sharing and Local Contribution.

Wilsonville has a strong interdisciplinary team with strong experience doing major planning efforts, including for new urban areas. This team is able and willing to put their time and resources behind the success of this important project. The total local contribution is at least \$60,000. The City has also submitted a grant application to Metro for \$81,200 in order to supplement the project's public engagement efforts and conduct targeted outreach to underrepresented groups as part of the design standards work. Together, this allows us to implement a work program that will achieve the goals set forth in HB 2001 as well as middle housing that is more affordable and inclusive and reflects the local needs as identified in our Equitable Housing Strategic Plan. The City is dedicated to this important housing work. However, the funding for House Bill 2001 work from the state, as set aside by the 2019 legislature, is needed to help ensure success of City efforts related to the bill.

2040 Planning and Development Grant Application | Community Engagement

Project: Wilsonville - Latinx Community Engagement on Housing

Grant funds requested: \$81,200

Please respond to the following questions using 11 point black text and a standard font. Your total response (including the questions and headings as formatted below) must be limited to 6 pages. Be thorough but succinct; it is not necessary to use all of the space allowed. You may use text styles, bullet lists, or other formatting as needed to improve the clarity of your responses. Demographic information provided under question #2 must also be included in the short questions section in ZoomGrants. Refer to the application handbook for more detailed instructions regarding additional required attachments.

Project purpose and context

1. Provide a brief summary of the planning or development project for which engagement is planned. What is the need for the project and this project's purpose? What are the goals and anticipated outcomes of the project? What will be the community impacts and benefits? What are the opportunities for community input to influence project outcomes and public decision-making? Include a general schedule for the project that includes key decision points or milestones and a total budget for the project.

Wilsonville is embarking on a project to carry forward actions identified in the City's Equitable Housing Strategic Plan. One of the key implementation actions identified in the draft plan is to incorporate equitable housing needs into housing planning, specifically the planning efforts related to House Bill 2001, a key component of which is creating siting and design standards for duplexes and middle housing (i.e. triplexes, quadplexes, rowhouses, cottage clusters). The draft Equitable Housing Plan particularly points out Latinx families will be an increasingly important group seeking housing options in Wilsonville, but they will have different preferences for unit types and sizes than voices historically involved in Wilsonville housing discussions. It is critical the City ascertains the details of these different preferences for unit types and sizes as we move forward with planning efforts. With the state mandate and tight timeline for adoption around House Bill 2001 the City does not have the budget or capacity to implement the level of outreach that will be needed to gather integral information from the Latinx community. The added assistance of the Community Engagement Grant will enable the City to have robust and targeted outreach to the Latinx community to enable this key demographic to guide the future of housing they are anticipated to occupy. In addition, the City expects the preferences of the Latinx community to better reflect, in comparison to data gathered in the general community, preferences of historically marginalized communities that have not historically had a large presence in Wilsonville's housing market. The City is particularly excited about how this project can help integrate housing of different types into neighborhoods, creating more inclusive neighborhoods rather than segregating housing by type.

Beyond informing a specific planning effort, the proposed project strives to establish long-term relationships and a framework for ongoing involvement of the Latinx community in decision making in Wilsonville. Specifically, the City will leverage the relationships and framework in the upcoming Frog Pond East and South Master Planning project, which includes a robust public involvement component. The City's previous Town Center planning effort had quality engagement with the Latinx community; however, it was topical, short-lived, City-driven and did not establish long-term empowerment for continued engagement in a variety of projects, both planning and non-planning related. The intent of this work would be go beyond a similar topical, short-lived, engagement to facilitate the growth of community-driven efforts in planning and non-planning projects. The most important effect of this work is it will facilitate the Latinx community involvement on a variety of decisions the City will work on in the coming years, which will likely include housing, park programming and design, library programming, transit service enhancements, pedestrian and bicycle infrastructure improvements, and Town Center implementation projects.

Key milestones, expected outcomes, and project schedule are as follows:**Milestone 1.** Establish Latinx Network and Framework for Engagement

Expected Outcome. Working with a non-profit community partner, to-be-determined as the first step in this project, establish a framework for the involvement of the Latinx community in City projects. Includes exploration of critical needs and methods for engagement that best facilitate involvement of Latinx community members. The City will immediately use the framework established for the outreach in Milestone 2.

Timeline October 2020 through January 2021

Milestone 2. Outreach to the Latinx Community Related to Siting and Design Standards for Duplexes and Middle Housing

Expected Outcome. Outreach efforts (determined with the help of the non-profit partner) leading to significant and noticeable impact of the Latinx community's view on duplex and middle housing siting design standards developed as part of a project to conform with new state laws and rules under House Bill 2001 and related administrative rules. The City aims for the siting and design standards to lead to quality design, help integrate a variety of housing types on streets and in neighborhoods, and allow feasible development of housing for the Latinx community and others. Siting and design elements to be assessed within the scope include, at minimum, house size and type, bulk and separation of buildings, location of entrances and garages in relation to the street, parking location and amount, and key architectural elements. All standards will be also assessed to ensure they do not add unnecessary costs that impact affordability. This milestone will also continue to reflect on and refine the framework for engagement of the Latinx community developed with Milestone 1.

Timeline January 2021 through July 2021

Milestone 3. Solidify Latinx Network and Framework for Engagement

Expected Outcome. Working with the non-profit partner to further strengthen long-term relationships that go beyond a specific project, establish a framework for the involvement of the Latinx community in future City projects. Includes further exploration of critical needs, areas of interest, and methods for engagement that best facilitate involvement of Latinx community members. Exploration of these same items will occur during Milestone 1 but additional exploration and refinement will be valuable. The further exploration at this milestone will be able to take lessons learned during Milestone 1 and the outreach in Milestone 2 and then carefully take time to discuss broad engagement of the Latinx community into the future. This milestone will correspond with the beginning of engagement on the Frog Pond East and South Master Plan project allowing an immediate opportunity for further engagement and impact on housing topics.

Timeline August 2021 through October 2021

Community Demographics

2. Provide demographic information including race, ethnicity, age, and income of the neighborhood or community that will be affected by the project. Indicate the data source and describe how the project geography relates to the data provided. If appropriate, include not only residential data but also relevant information (even if anecdotal) regarding local businesses, employers or commercial districts.

The City's recent Equitable Housing Strategic Plan Market Research Report (August 2019) sheds light on key demographic trends that will influence future housing growth and needs in Wilsonville. Data sources cited in this research include the United States Decennial Census, United States American Community Survey, Portland State University's Population Research Center, Redfin, and Property Radar.

- In 2012-2016, 20% of Wilsonville’s population was over 60 years old. Between 2020 and 2040, this segment of the population is expected to stay relatively constant in Clackamas County, from 26% to 27%. The aging of Baby Boomers may have less impact in Wilsonville than in some cities in the County because the City has a smaller share of people over 60 years of age. However, the City will be affected by retirement and changing housing needs of seniors as their households get smaller and their lifestyles change.
- In 2012-2016, 32% of Wilsonville’s population was between 20 and 40 years old. Between 2020 and 2040, Millennials are expected to grow from 23% to 28% of Clackamas County’s population. Homeownership rates for Millennials will increase as they continue to form their own households. Wilsonville has a larger share of Millennials than the County. As a result, the City may have increased demand for relatively affordable housing types, for both ownership and rental, over the planning period.
- From 2000 to the 2012-2016 period, the share of Wilsonville’s population identifying as Latinx increased from 7% to 14%. Continued growth in Latinx households will the increase need for larger units (to accommodate larger, sometimes multigenerational households) and housing at a variety of price points.
- In 2012-2016, Wilsonville’s median household income was \$63,097. Median income varies by tenure, with a median household income for renters (\$50,406) that is less than half the median for homeowners (\$105,036). Approximately 38% of Wilsonville’s households earn less than \$50,000 per year.

As part of the Equitable Housing Strategic Plan stakeholder outreach, the project team held a focus group with local employers and higher education providers to gather insight on how housing costs affect employees and students in Wilsonville. These employers noted that shift workers, many of whom are Latinx, face increasing traffic congestion to get to work as they are unable to find housing within Wilsonville. These employees are finding lower-cost housing in places like Salem, Keizer, Woodburn, Oregon City, Tualatin, and Canby.

Team capacity and experience

3. Identify key government staff assigned to the project and project leads involved from a consultant (if applicable). Clearly indicate the role of each team member. Describe the experience of any team members who have worked in the engagement of historically marginalized communities in similar planning and development efforts. Include brief examples of past work. If applicable, describe any relevant cultural experience or lived experience of team members that might be relevant to this effort.

The project manager is Daniel Pauly, AICP, who currently holds the position of Planning Manager at the City of Wilsonville. Daniel’s passion and standards for quality community engagement were set early in his planning career as he interned with the Portland Bureau of Planning on VisionPDX. This innovative program, championed by then mayor Tom Potter, reached a diverse group of over 17,000 Portlanders using innovative techniques and received the American Planning Association Award for Public Outreach in 2008.

In Daniel’s time at Wilsonville he, with the rest of the Planning Division team, has been engaged in outreach to historically marginalized communities. Most notably, with support of a Metro grant, the City used an extensive tool chest to reach many communities for the recent Wilsonville Town Center Plan. This project involved discussions about community design preferences similar to those planned for this project. Through the Town Center Plan project, the City developed partnerships with schools to reach youth and Latinx families, as well as engaged a popular local ethnic grocer and restaurant called “La Tienda San Francisco” to further work with the Latinx community. The Planning team feels very comfortable managing and championing the type and scale of community engagement the requested grant would support.

Added team capacity and experience desired

4. Describe the qualifications and experience that you are seeking to add to your team through the involvement of a community partner or liaison. Discuss your strategy to recruit and select the organization(s) or individual(s) who would join your team. How do you propose to integrate the community partner/liaison into the planning or development project team? Will they have opportunity to adjust your engagement plans to best meet intended goals? [If you have already identified a community partner/liaison to be involved, explain how their specific expertise, perspective, and/or relationships will enhance project success.]

The City seeks to expand their capacity to reach and understand the design and housing preferences of the Latinx community by engaging a non-profit partner with both housing knowledge and connection with this key demographic. The City will work with Metro engagement staff, other jurisdictions, and recruitment professionals as necessary to find the right organization. Engagement will not begin until early 2021, allowing the later part of 2020 to work through the process of finding the right partner. The City will provide the non-profit partner with details of the scope and goals of the project, as well as outreach materials, and expects them to then use their capacity to reach the target community with methods they feel most effective. The non-profit will have substantial flexibility on their approach, with the overall intent of their outreach to inform and shape the middle housing siting and design standards based on the perspective of the Latinx community. Once the siting and design standards are done the proposal goes beyond the siting and design guidelines to establish a framework for ongoing Latinx involvement in decision making and establish long-term relationships. Establishing the Latinx framework for engagement and solidifying relationships will correspond with the beginning of outreach for the Frog Pond East and South Master Plan project, providing an immediate opportunity for the Latinx community to be further engaged in a housing-related project.

Anticipated engagement plan or concept

5. Describe your anticipated engagement plans for the project (without this grant.) Include engagement goals, audiences you intend to contact, and methods for engagement (meetings, workshops, surveys, focus groups, interviews, door-knocking, etc.). If awarded this grant, how will your engagement approach be different?

Without the grant the anticipated engagement plan would be as follows:

- Develop survey content, including visual, for the City's "Let's Talk Wilsonville" engagement website
- Develop visual preference survey to use at pop up and various community-wide events, including the City's annual Community Block Party, library, farmers markets, art fairs, etc.
- Coordinate with the school district to take visual preference or modified survey content into classrooms

The grant would enable targeted outreach to the Latinx community both for this and future projects. Potential tools employed by the community partner may include one-on-one interviews, focus groups at apartment complexes (including subsidized housing complexes in the city) workplace outreach particularly to hourly employees, staffing events heavily attended by the Latinx community, hosting tailored events, and other techniques the partner thinks most effective to engage this key demographic.

Proposed engagement budget

6. Using the budget table template provided, indicate the major project phases, the grant-funded public engagement tasks or elements you imagine for each phase, and their associated costs. Identify any additional funding [if any] available from other sources.

The City is requesting \$81,200 from Metro to support inclusive outreach methods that will help the City engage historically marginalized communities to participate in and inform the goals/outcomes of this project. These funds would cover the costs of a non-profit organization and their assistance with engagement efforts for the project. The City is also applying for funding from DLCD to support consultant costs related to a code audit with recommendations for House Bill 2001 compliance. In addition, the City is requesting a City budget add package of \$115,000 for the next fiscal year to fund consultant costs for the technical code and design components of the project to go beyond base compliance and meet the broader objectives that led to the creation of House Bill 2001. Of this add package \$95,000 is focused on siting and design standards that can result in more affordable and diverse middle housing options and includes base community outreach efforts. The City anticipates spending an additional \$40,000 in staff time on community engagement to support that effort. This grant request to Metro would further enhance that outreach effort.

A great opportunity exists for the City to leverage the state mandated House Bill 2001 work to make significant gains on the Equitable Housing front. Specifically, to bring ideas and voices historically marginalized into the planning of future housing. However, the state mandate and limited timeframe leaves the City without the resources to robustly engage the Latinx community, a key demographic that will be a growing part of the Wilsonville community and that often does not participate in traditional City-led outreach activities. This grant will enable the City to perform a high level of engagement with the Latinx community, and other community members as identified by the non-profit partner, to guide the future of housing in Wilsonville.

The impact on the future of housing will not end with this project. The proposed scope includes a specific effort to solidify relationships and establish a framework for future involvement. This portion of the project will overlap with the beginning of outreach on the Frog Pond East and South Master Plan project which will guide the development of approximately 1,300 housing units in a new urban area. The City anticipates the effort facilitated by this grant to have a significant impact on Frog Pond East and South planning both by incorporating ideas developed during the middle housing siting and design standards development and through further conversations on other housing and neighborhood design topics. The relationship and framework is also anticipated to empower the Latinx community to engage and have an impact on other areas and services including parks and recreation, the library, and transit.

Attachment 3 Latinx Community Engagement Grant Narrative Submitted to Metro

Project Phases and Engagement Components	Proposed Grant Funding		
	CBO Compensation	Liaison Compensation	Direct Expenses for Engagement
Milestone 1. Establish Latinx Network and Framework for Engagement (avg 15 hrs per week of CBO staff time over 10 weeks) (direct expenses for CBO including hardware and software, transportation costs, printing costs, food for events avg. approx.. \$265 per week)	\$15,000		\$2650
Milestone 2. Outreach to the Latinx Community Related to Siting and Design Standards for Duplexes and Middle Housing (avg 15 hrs per week of CBO staff time over 24 weeks) (direct expenses for CBO including hardware and software, transportation costs, printing costs, food for events avg. approx.. \$265 per week)	\$36,000		\$6350
Milestone 3. Solidify Latinx Network and Framework for Engagement (avg 15 hours a week over 12 weeks) (direct expenses for CBO including hardware and software, transportation costs, printing costs, for events, avg. approx.. \$265 per week)	\$18,000		\$3200
TOTAL	\$69,000		\$12,200

**Proclamation Declaring June 19, 2020, as
“Celebration of Juneteenth in Wilsonville”**

WHEREAS, the Emancipation Proclamation, was an executive order issued by President Abraham Lincoln on September 22, 1862, effective January 1, 1863, that freed approximately 3.5 million slaves in the Confederate states; and

WHEREAS, while President Abraham Lincoln had officially freed the slaves, enforcement of this order became difficult to enforce in areas where there were few Union soldiers. Texas, in particular, remained unaffected, as it was geographically isolated from Union troops and thus was the last confederate state to have the proclamation announced; and

WHEREAS, many slave owners moved to Texas looking to not be affected by the enforcement of the proclamation. By the end of the Civil War on April 9, 1865, the number of slaves in Texas had increased by tens of thousands, despite the proclamation; and

WHEREAS, on June 19, 1865, Major General Gordon Granger from the Headquarters District of Texas in Galveston, with more than 2,000 Union troops, traveled to every county in Texas informing the people that all slaves were free; and

WHEREAS, the Juneteenth celebration was started a year later in Texas to celebrate the importance of June 19 with the announcement that slavery had been abolished. It was from this celebration that Juneteenth (“June” combined with “nineteenth”) was born; and

WHEREAS, Juneteenth is celebrated in 47 of the 50 states - Oregon being one of them - but, it is not officially recognized as a national holiday as legislation has stalled in Congress; and

WHEREAS, traditions include public readings of the Emancipation Proclamation, singing traditional songs such as "Swing Low, Sweet Chariot" and "Lift Every Voice and Sing", and reading of works by noted African-American writers such as Ralph Ellison and Maya Angelou, as well as sharing of slave food delicacies, including the barbecue pit, and certain foods that became popular and synonymous with Juneteenth celebrations, such as strawberry soda-pop.

NOW THEREFORE, I, Tim Knapp, Mayor of the City of Wilsonville, encourage all citizens to join with our neighbors and Wilsonville’s African American community to declare June 19, 2020, as “Celebration of Juneteenth in Wilsonville.”

Dated the 15th day of June 2020

Tim Knapp, Mayor

CITY COUNCIL ROLLING SCHEDULE Board and Commission Meetings 2020

Items known as of 06/11/20

June

DATE	DAY	TIME	EVENT	LOCATION
6/22	Monday	6:30 p.m.	DRB Panel B – Cancelled	Council Chambers
6/24	Wednesday	6:30 p.m.	Library Board	Library

July

DATE	DAY	TIME	EVENT	LOCATION
7/6	Monday	7:00 p.m.	City Council	Council Chambers
7/8	Wednesday	6:00 p.m.	Planning Commission	Council Chambers
7/13	Monday	6:30 p.m.	DRB Panel A	Council Chambers
7/20	Monday	7:00 p.m.	City Council Meeting	Council Chambers
7/22	Wednesday	6:30 p.m.	Library Board	Library
7/27	Monday	6:30 p.m.	DRB Panel A	Council Chambers

Community Events:

- 6/16** Toddler Time; 10:30 a.m. to 11:00 a.m. online at:
<https://www.facebook.com/WilsonvilleLibrary/>
- 6/17** Guided Meditation Meetup; 5:30 p.m. to 6:00 p.m. online at:
<https://www.facebook.com/WilsonvilleParksandRec/>
- 6/18** Stories to Go!; 10:30 a.m. to 11:00 a.m. online at:
<https://www.facebook.com/WilsonvilleLibrary/>
- 6/19** Baby Rhyme Time; 10:30 a.m. to 11:00 a.m. online at:
<https://www.facebook.com/WilsonvilleLibrary/>
- 6/23** Toddler Time; 10:30 a.m. to 11:00 a.m. online at:
<https://www.facebook.com/WilsonvilleLibrary/>
- 6/24** Guided Meditation Meetup; 5:30 p.m. to 6:00 p.m. online at:
<https://www.facebook.com/WilsonvilleParksandRec/>
- 6/25** Stories to Go!; 10:30 a.m. to 11:00 a.m. online at:
<https://www.facebook.com/WilsonvilleLibrary/>
- 6/26** Baby Rhyme Time; 10:30 a.m. to 11:00 a.m. online at:
<https://www.facebook.com/WilsonvilleLibrary/>
- 6/30** Toddler Time; 10:30 a.m. to 11:00 a.m. online at:
<https://www.facebook.com/WilsonvilleLibrary/>
- 7/1** Guided Meditation Meetup; 5:30 p.m. to 6:00 p.m. online at:
<https://www.facebook.com/WilsonvilleParksandRec/>
- 7/3** City offices & SMART closed in observance of Independence Day, Library open
- 7/4** Library closed in observance of Independence Day

All dates and times are tentative; check the City's online calendar for schedule changes at www.ci.wilsonville.or.us.

Creating jobs, building our future

Wilsonville City Council

June 15, 2020

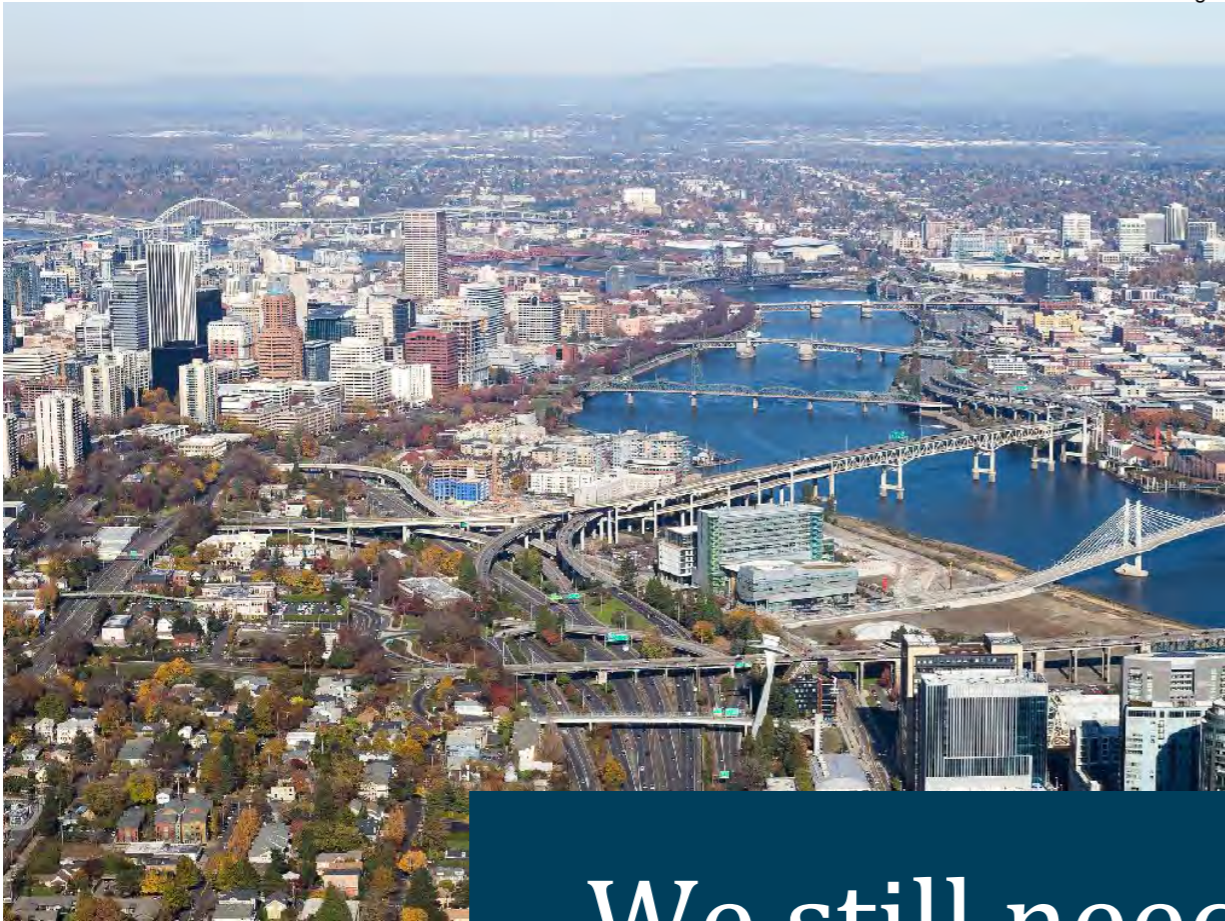


Metro



A scenic view of a city at sunset. The sun is low on the horizon, creating a bright orange and yellow glow. The city below is silhouetted against the light, with several tall buildings visible. In the background, a large mountain peak is visible against the sky. The foreground is dark, with some foliage visible on the left side.

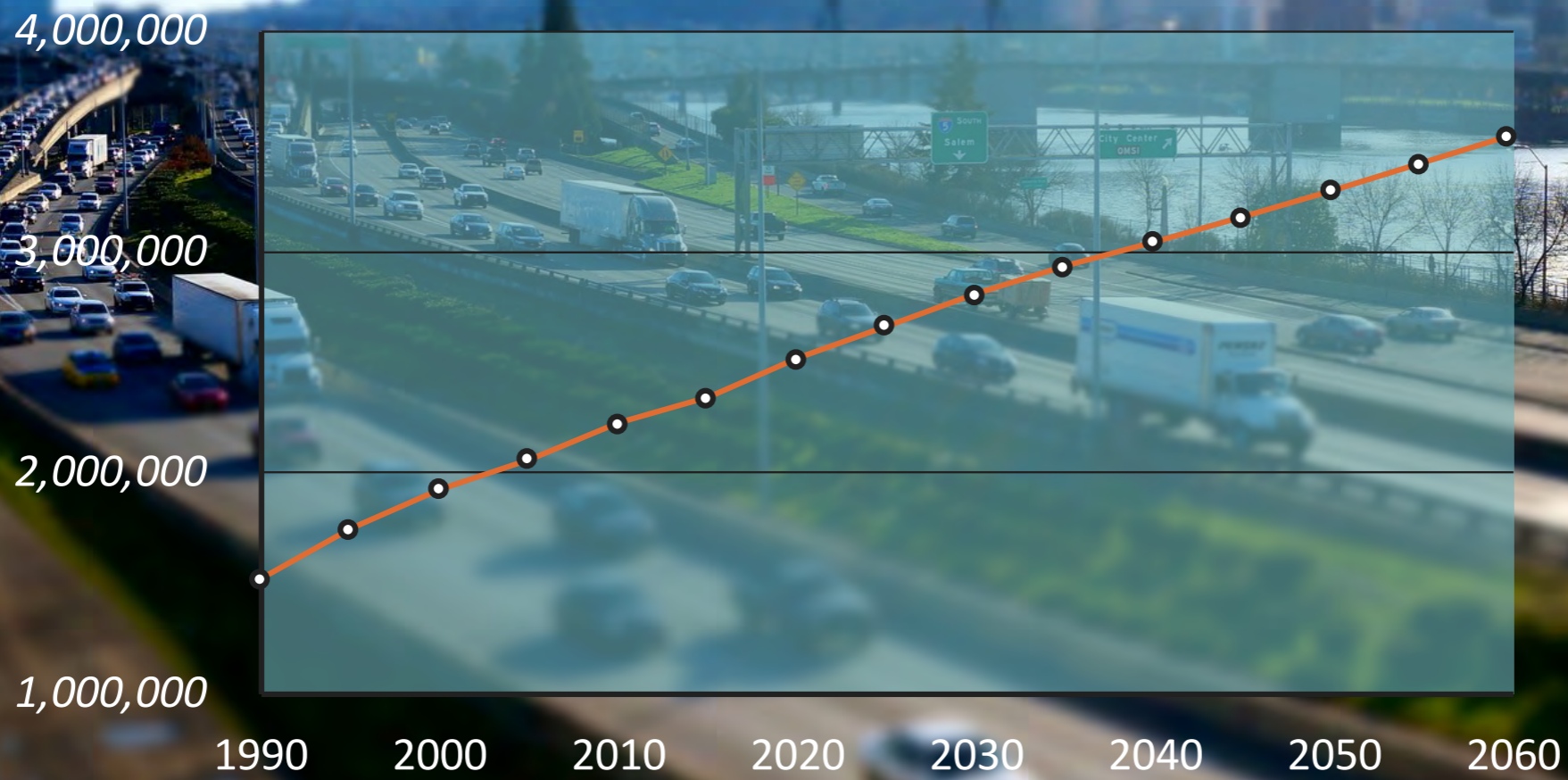
We are still one region.



We still need to think big.

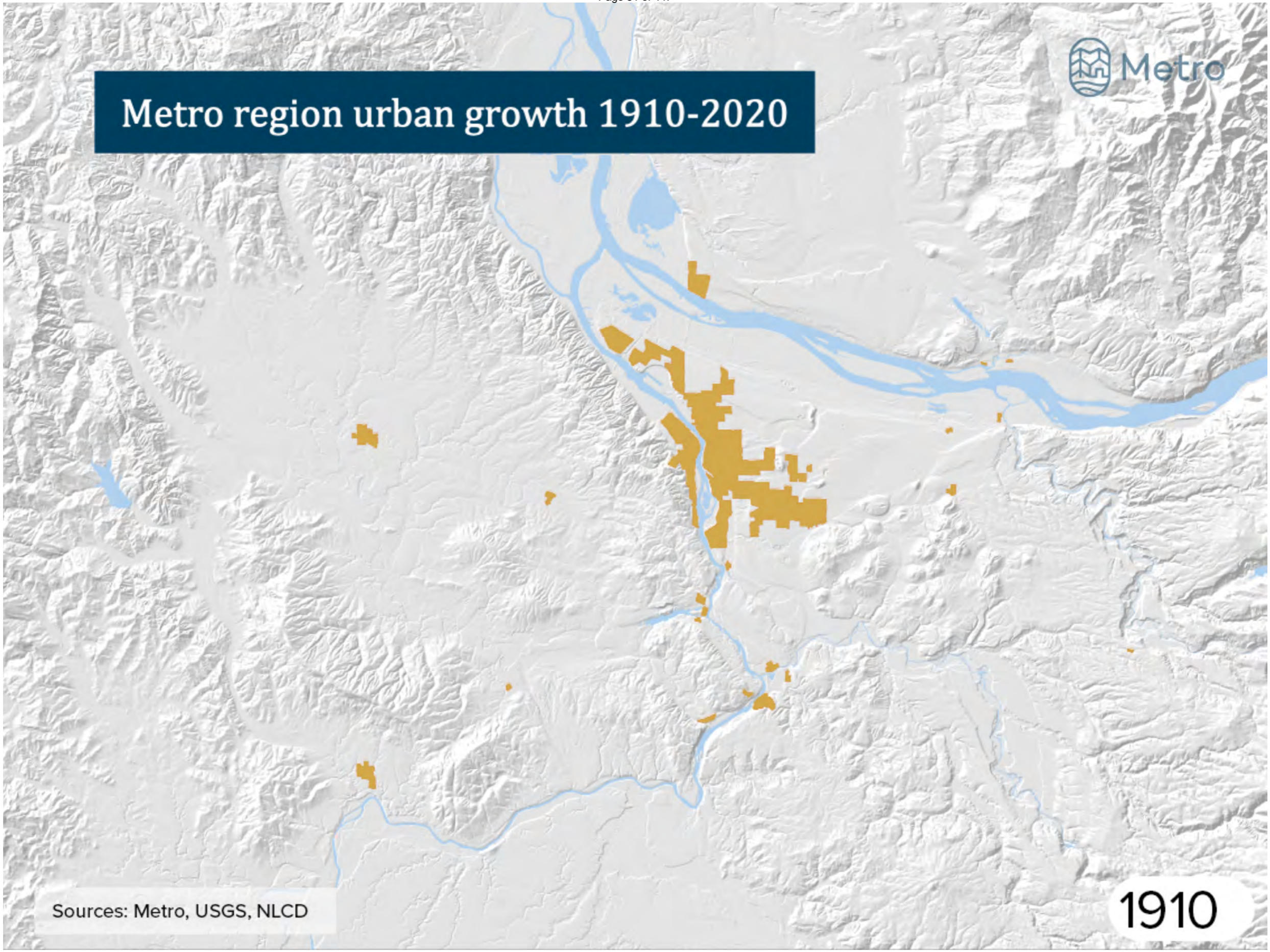


Metro Region 2060 Population Forecast





Metro region urban growth 1910-2020

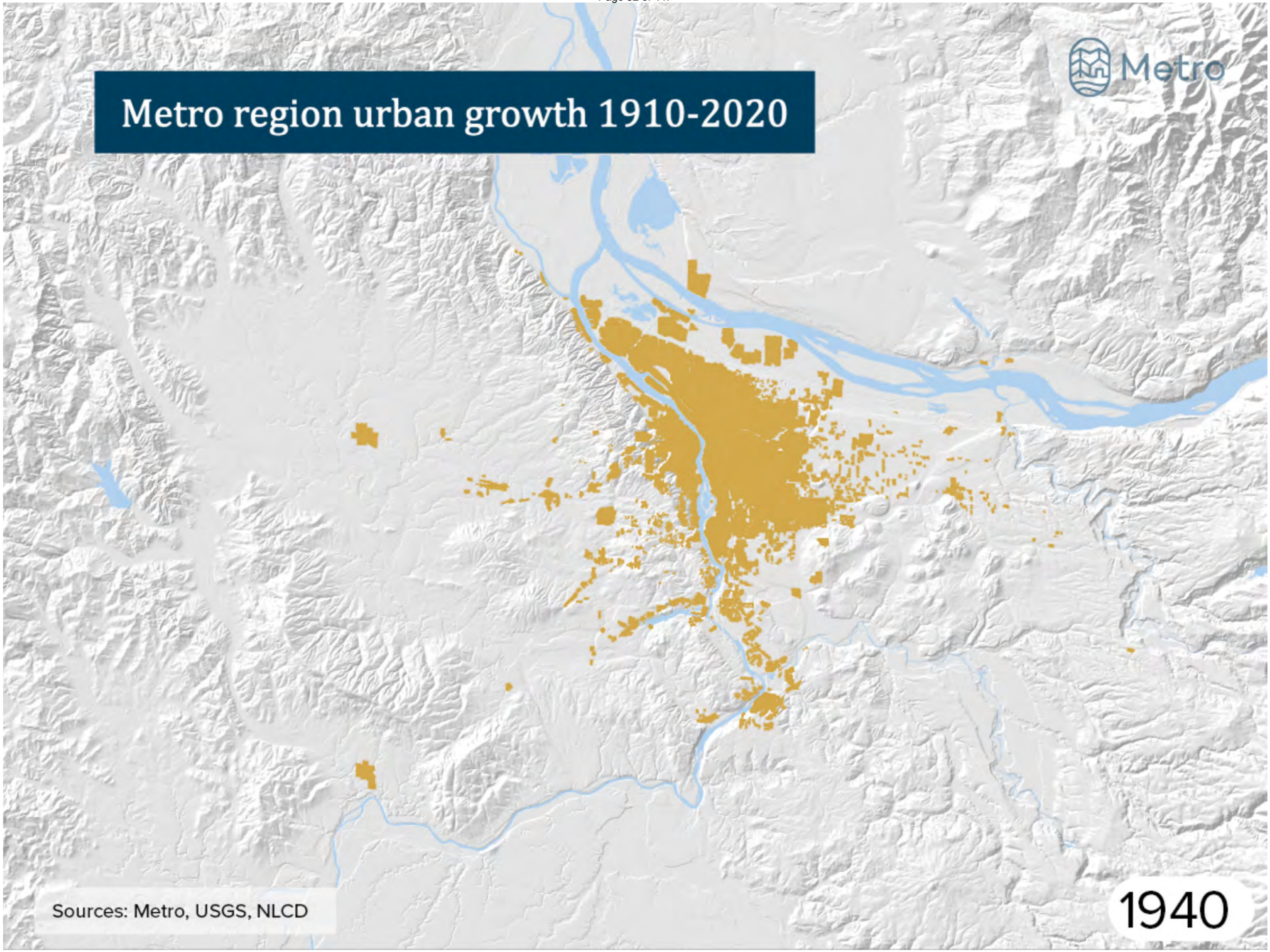


Sources: Metro, USGS, NLCD

1910



Metro region urban growth 1910-2020

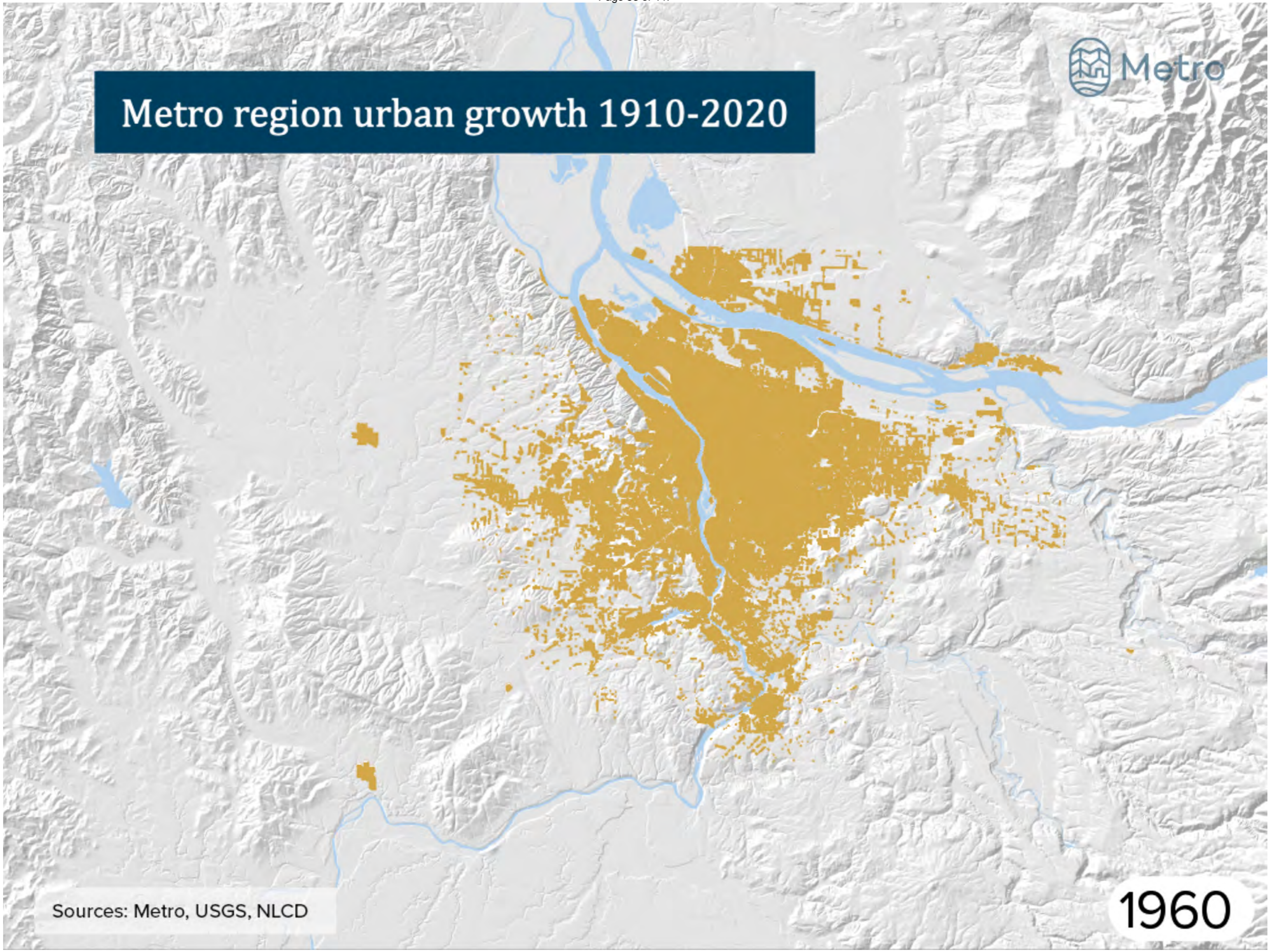


Sources: Metro, USGS, NLCD

1940



Metro region urban growth 1910-2020

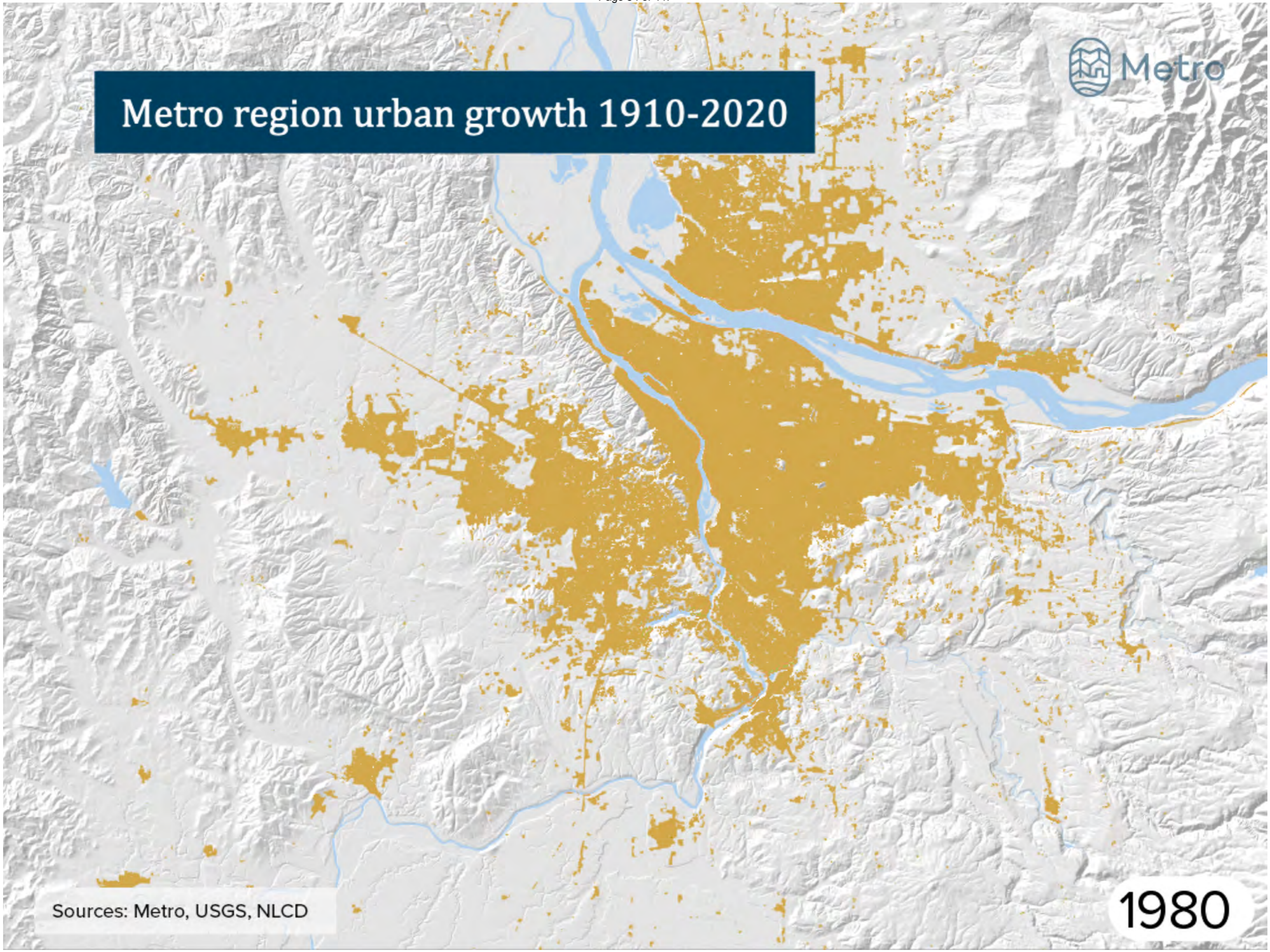


Sources: Metro, USGS, NLCD

1960



Metro region urban growth 1910-2020

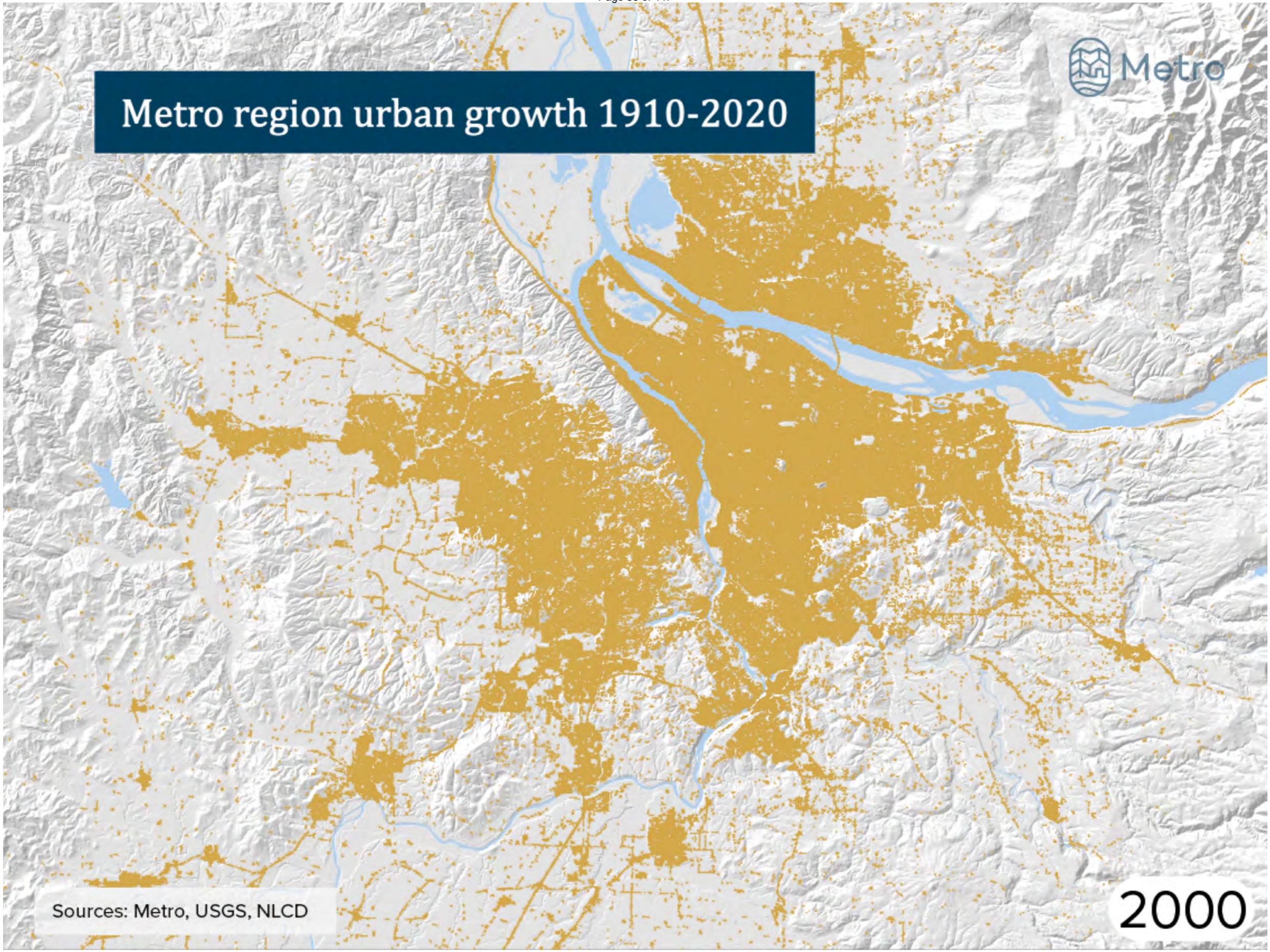


Sources: Metro, USGS, NLCD

1980



Metro region urban growth 1910-2020

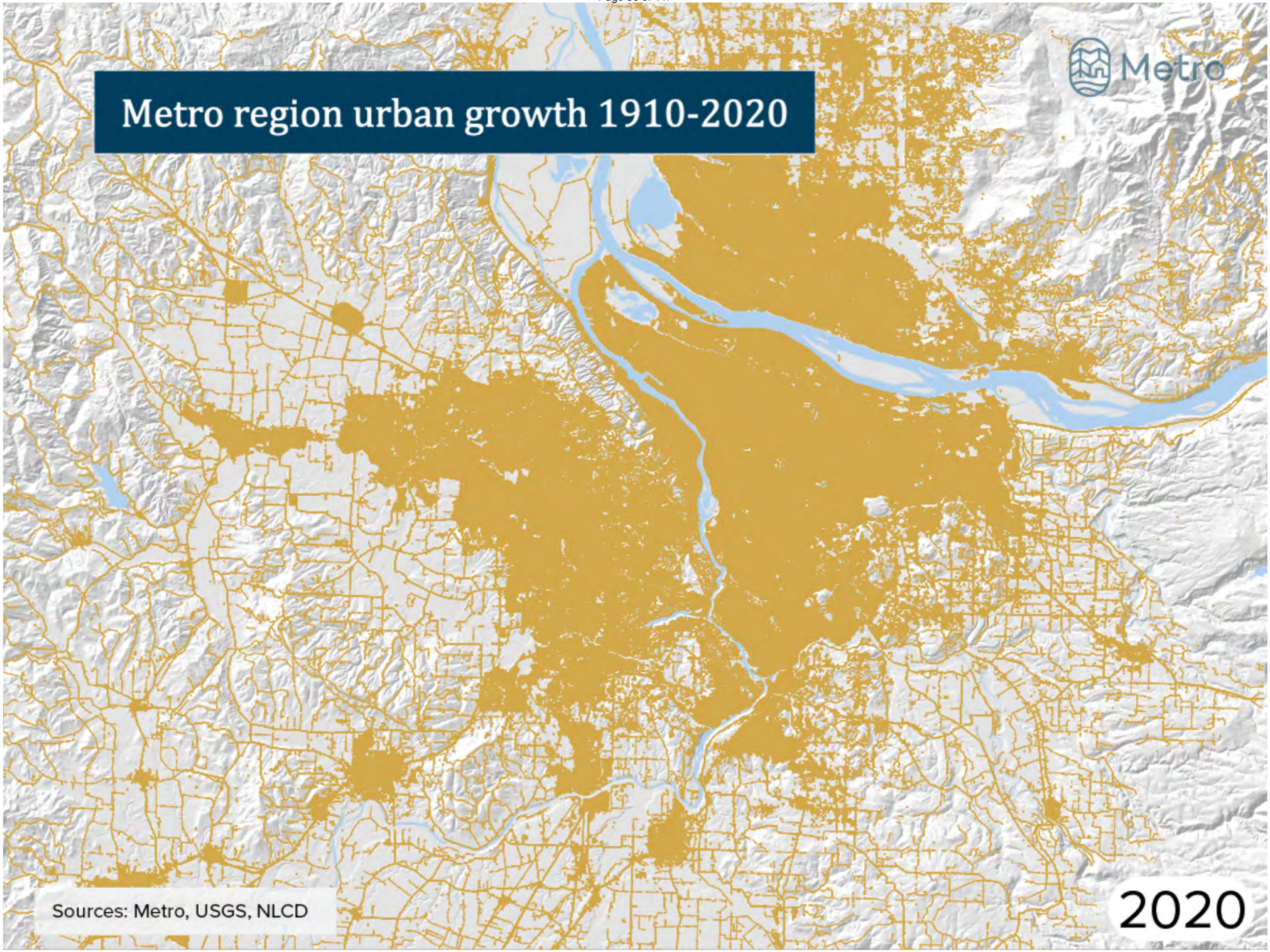


Sources: Metro, USGS, NLCD

2000



Metro region urban growth 1910-2020



Sources: Metro, USGS, NLCD

2020





37,500+ jobs.













What will we build?



115-120

Miles of roadway improvements



60

Miles of roadway planning



25-30

Miles of
new bus
lanes



260

New transit
priority
signals



11

Miles of
new MAX
line



40-45

Miles of new sidewalk



4,000

New street lights



280

Safe marked crossings

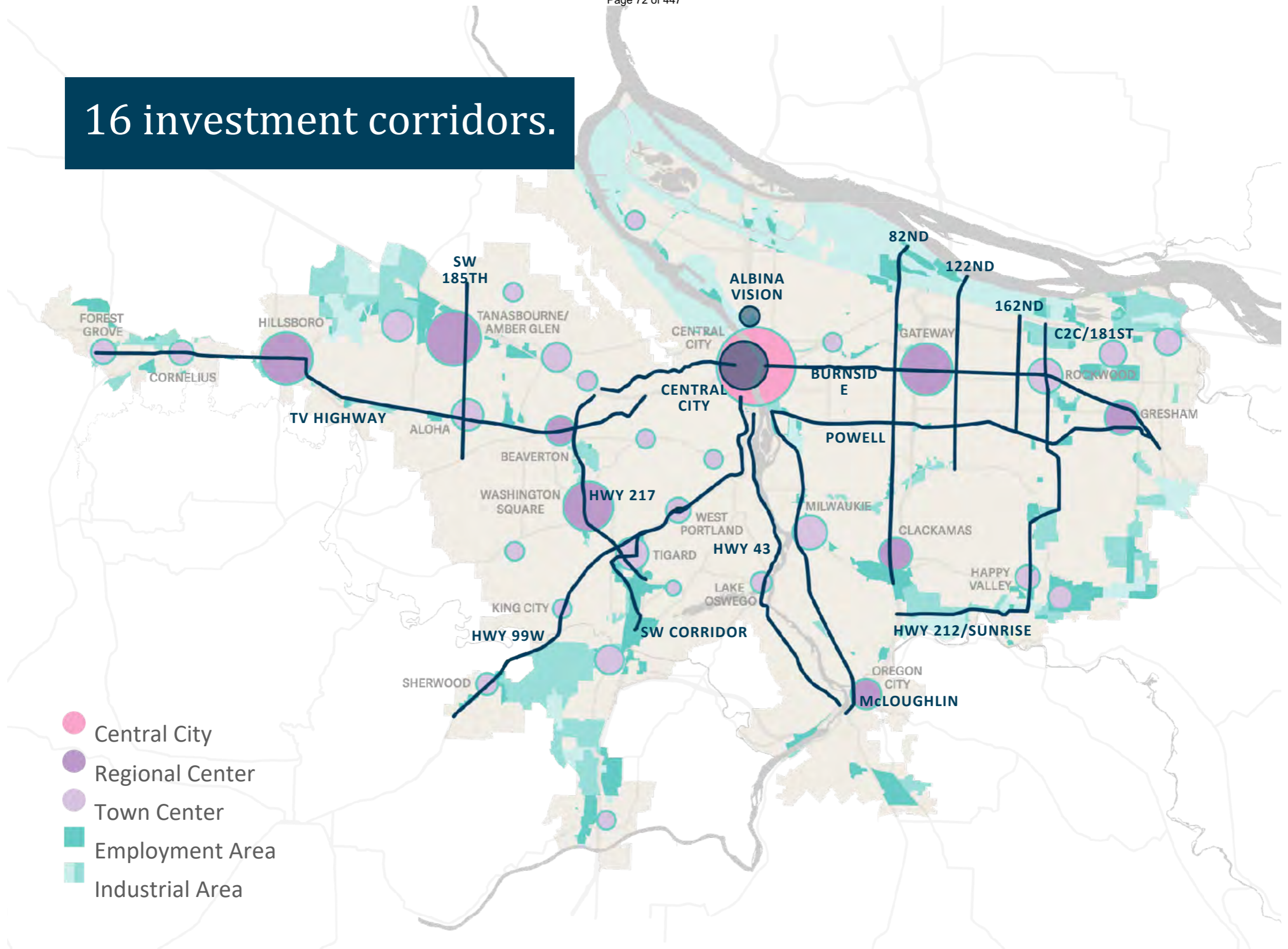


130-140

Miles of improved
bikeways

Where will we build it?

16 investment corridors.





WASHINGTON COUNTY INVESTMENTS

Southwest
Corridor

TV Highway

SW 185th

Burnside

Highway 217

Highway
99W

Southwest Corridor



9-15
MILES OF NEW
SIDEWALK



20-40
SAFE MARKED
CROSSINGS



9-15
MILES OF
IMPROVED
BIKEWAYS



150-250
NEW STREET
LIGHTS



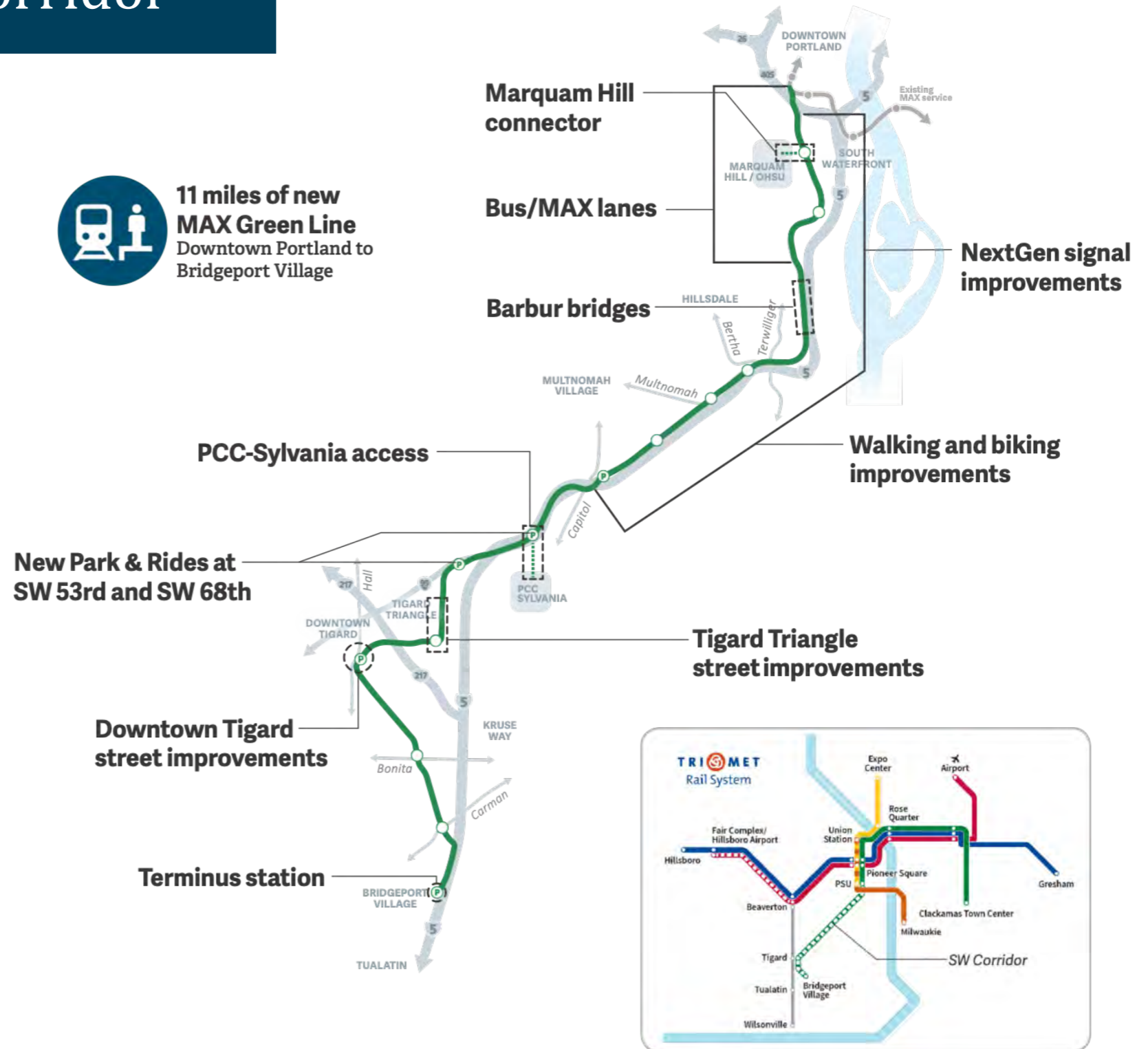
20-35
NEW TRANSIT
PRIORITY SIGNALS



2-3
MILES OF NEW
BUS LANES



**11 miles of new
MAX Green Line**
Downtown Portland to
Bridgeport Village



TV Highway



5-10
MILES OF NEW
SIDEWALK



20-40
SAFE MARKED
CROSSINGS



25-45
MILES OF
IMPROVED
BIKEWAYS



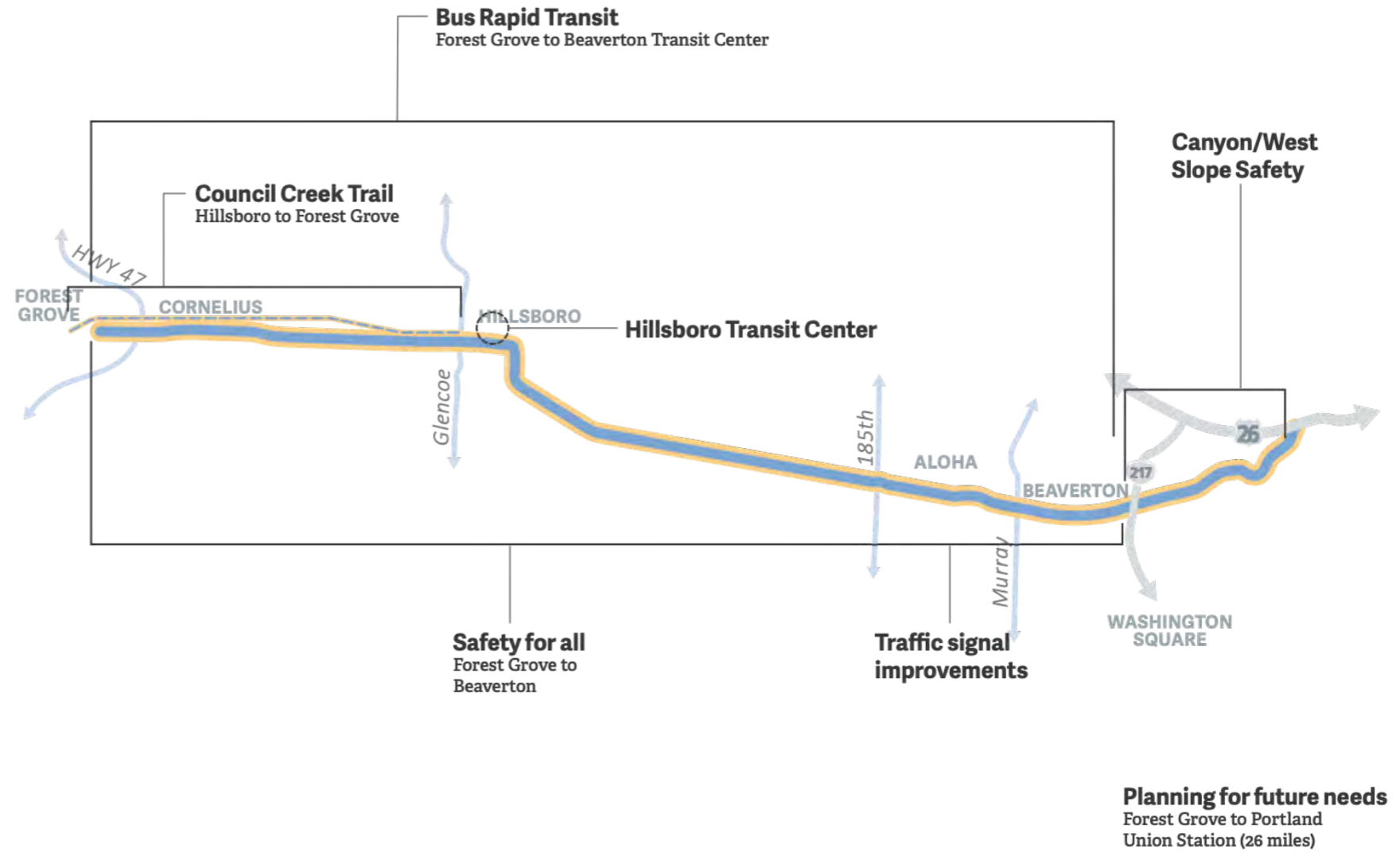
720-1200
NEW STREET
LIGHTS



50-80
NEW TRANSIT
PRIORITY SIGNALS



2-5
MILES OF NEW
BUS LANES



SW 185th



1-2
MILES OF NEW
SIDEWALK



6-10
SAFE MARKED
CROSSINGS



3-5
MILES OF
IMPROVED
BIKEWAYS



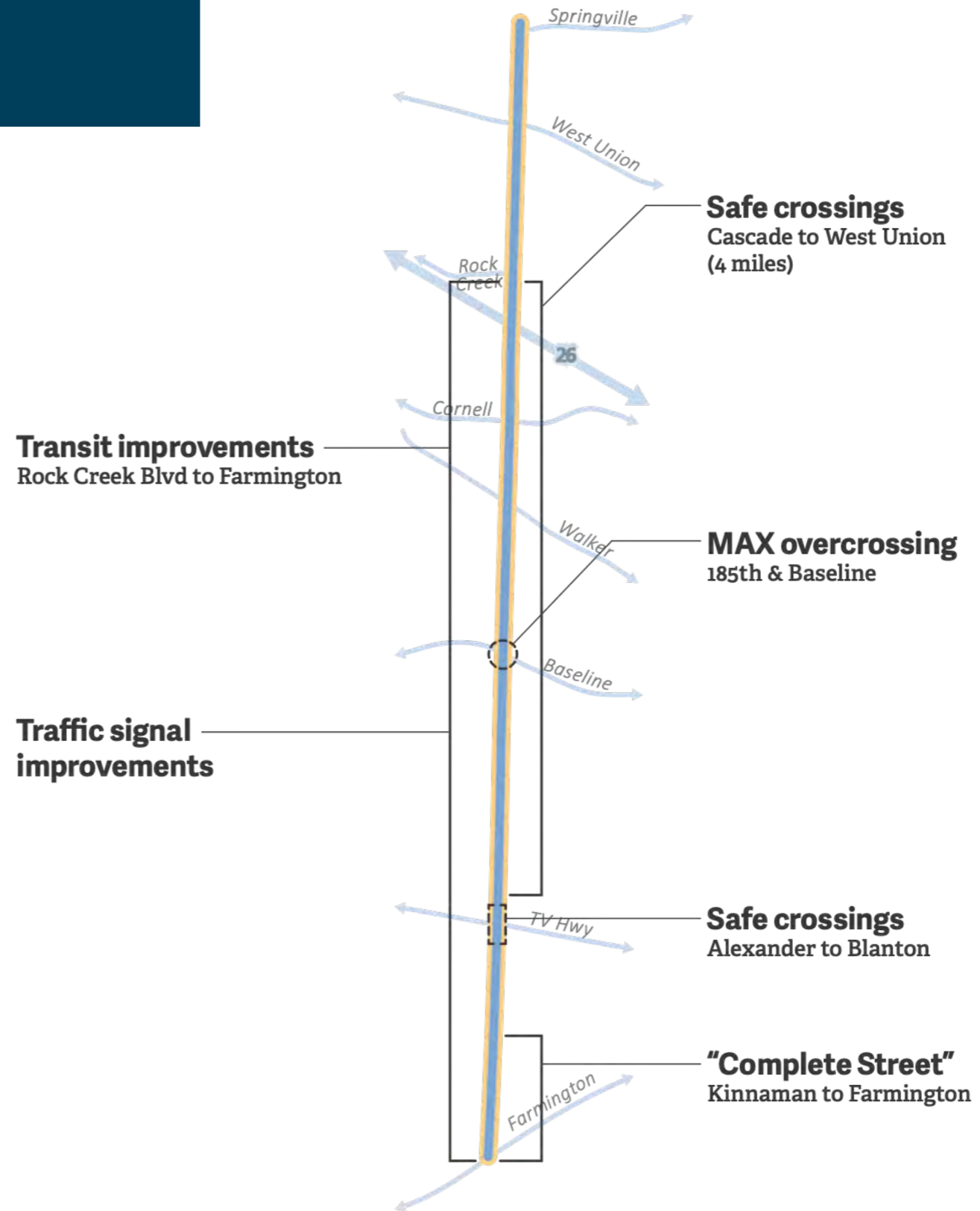
45-80
NEW STREET
LIGHTS



10-25
NEW TRANSIT
PRIORITY SIGNALS



1
MILE OF NEW
BUS LANES



Burnside



2-5
MILES OF NEW
SIDEWALK



20-35
SAFE MARKED
CROSSINGS



8-15
MILES OF
IMPROVED
BIKEWAYS



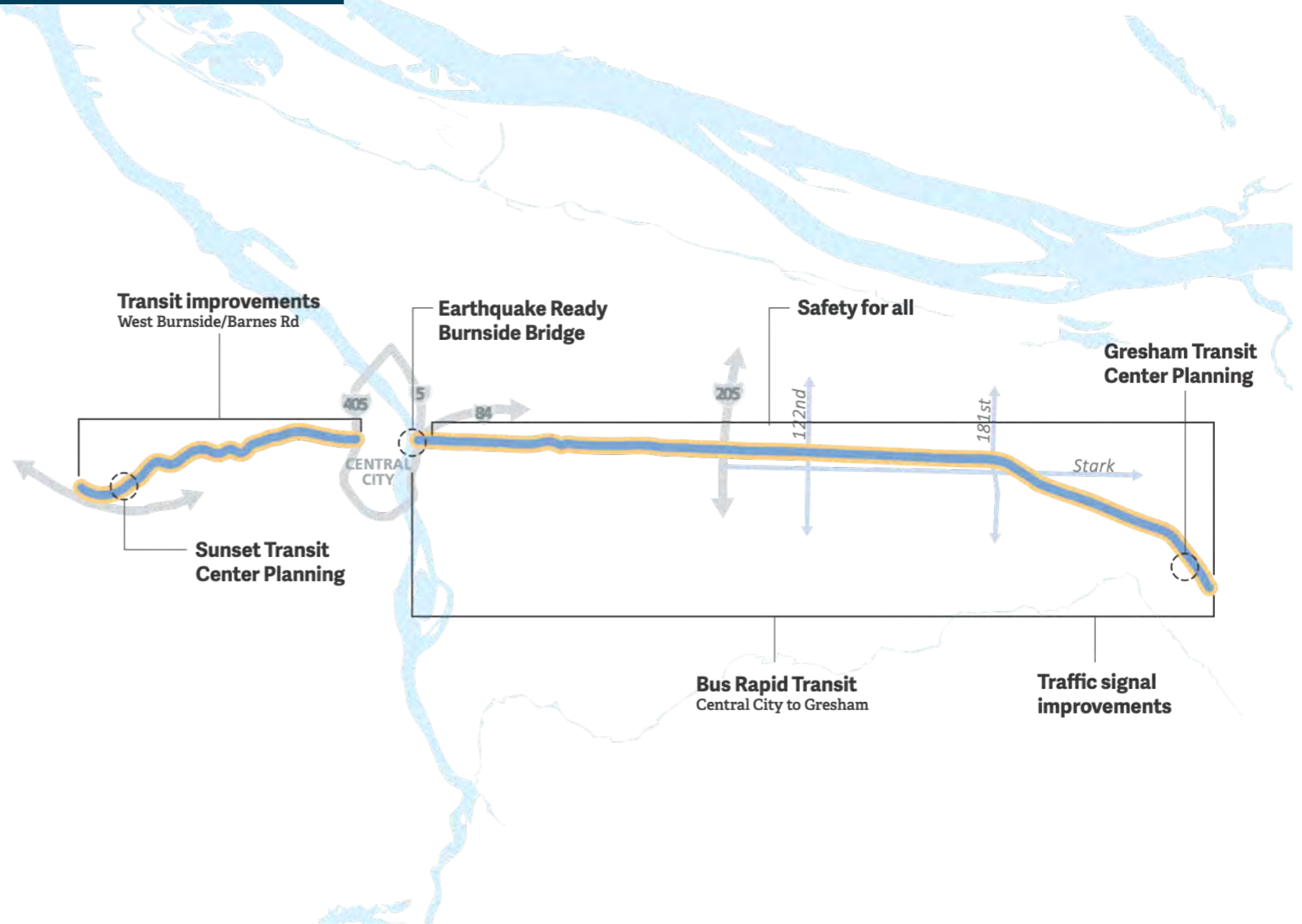
100-170
NEW STREET
LIGHTS



20-35
NEW TRANSIT
PRIORITY SIGNALS



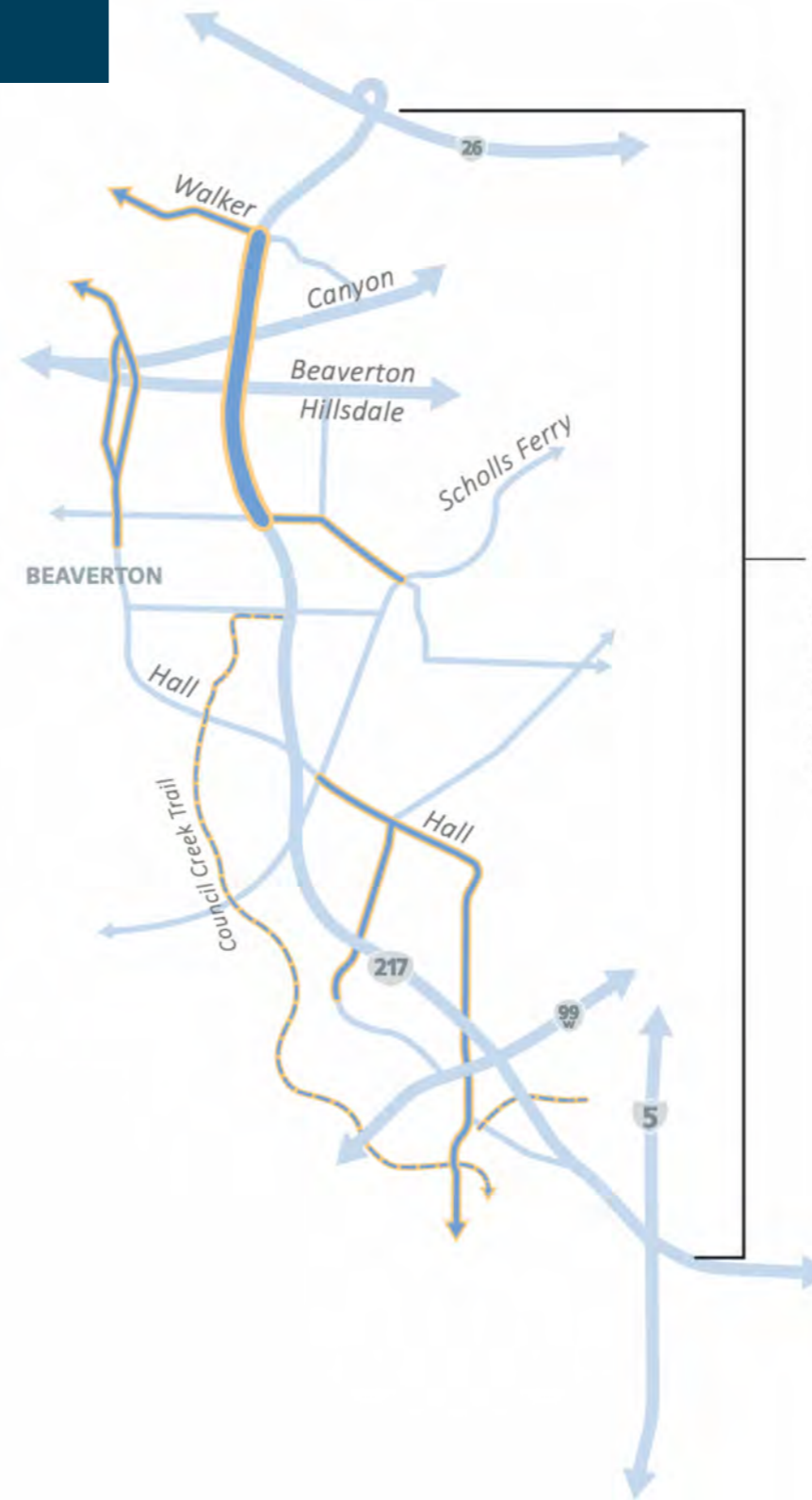
3-6
MILE OF NEW
BUS LANES



Highway 217



PLANNING AND
DESIGN FOR FUTURE
IMPROVEMENTS



**Corridor Planning
and Project
Development**
US 26 to I-5, including
parallel roadways
(7 miles)

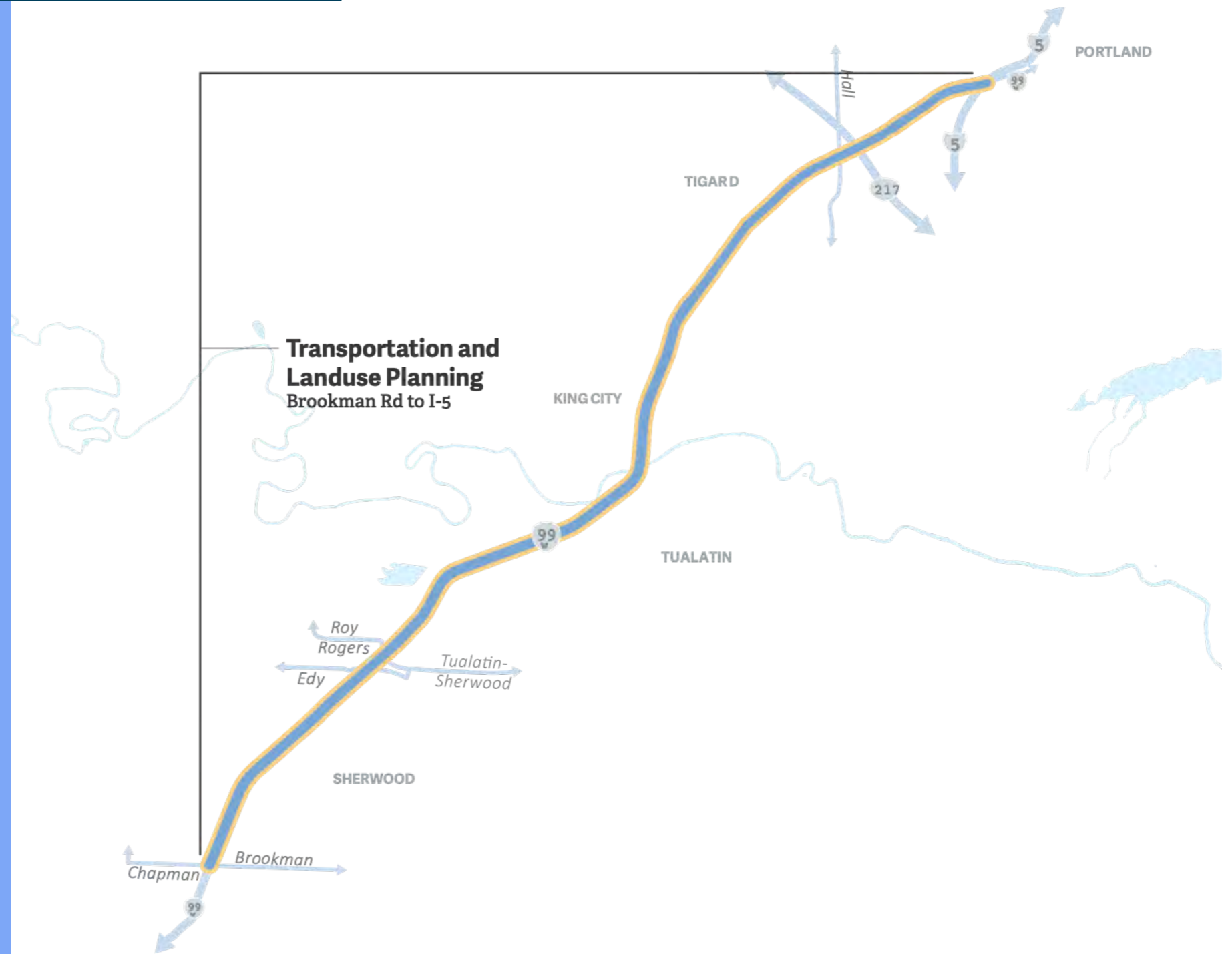
Pacific Highway 99W



PLANNING
FOR FUTURE
IMPROVEMENTS



STAKEHOLDER
ENGAGEMENT





CLACKAMAS
COUNTY
INVESTMENTS

McLoughlin

Highway
212/Sunrise

Highway 43

Clackamas-to-
Columbia/18
1st

82nd Ave

\$4B

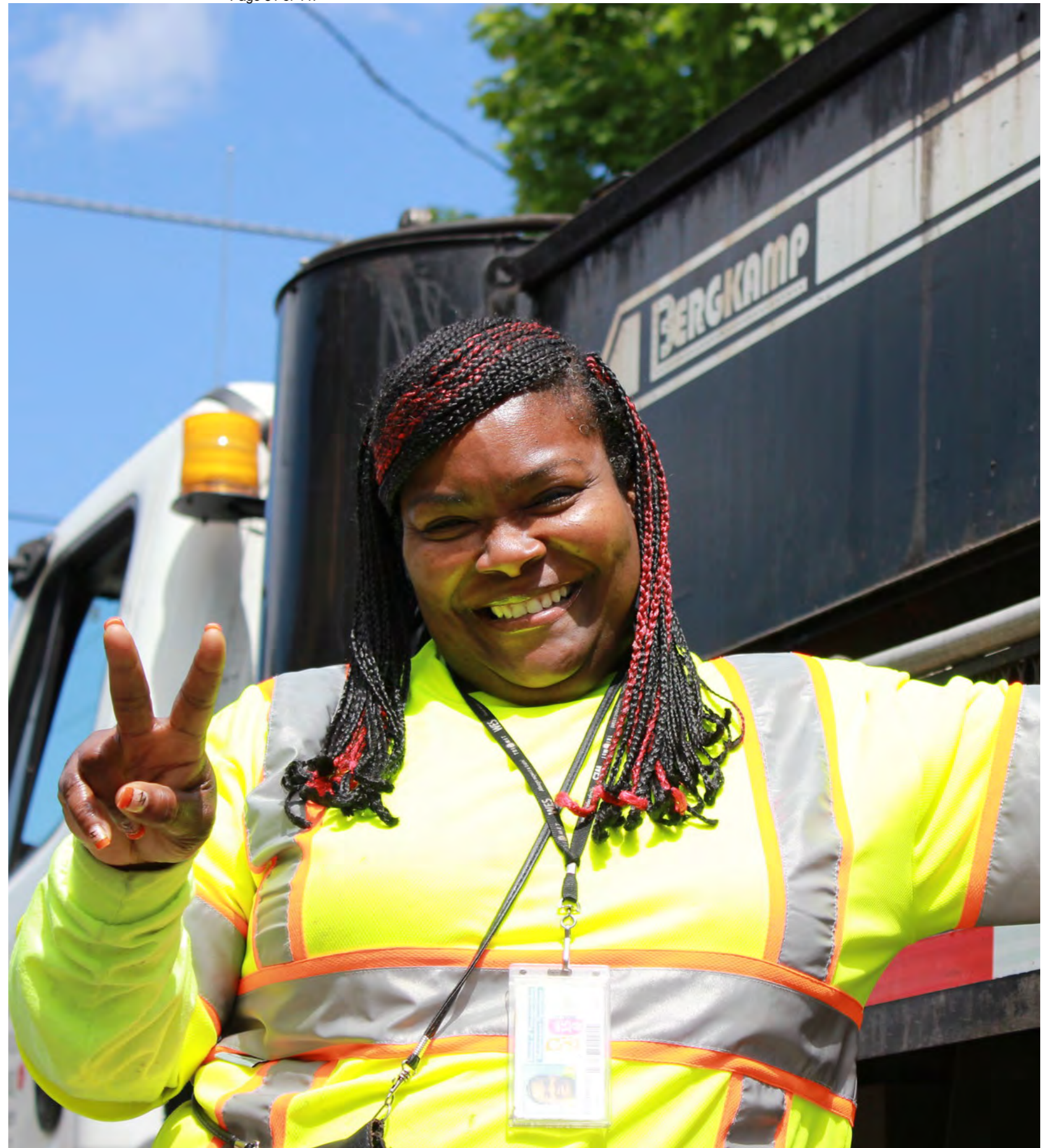
Estimated total construction spending on investment corridors

37,500+

Estimated construction jobs created (direct and indirect)

\$98,000

Average annual income per construction job





REGIONWIDE PROGRAMS



Safe Routes
To School



Safety Hot Spots



Regional Walking and
Biking Connections



Revitalizing
Main Streets



REGIONWIDE PROGRAMS



**Anti-displacement
Strategies**



**Affordable Housing
Strategies**



**Student Fare
Affordability**



REGIONWIDE PROGRAMS



Bus Electrification



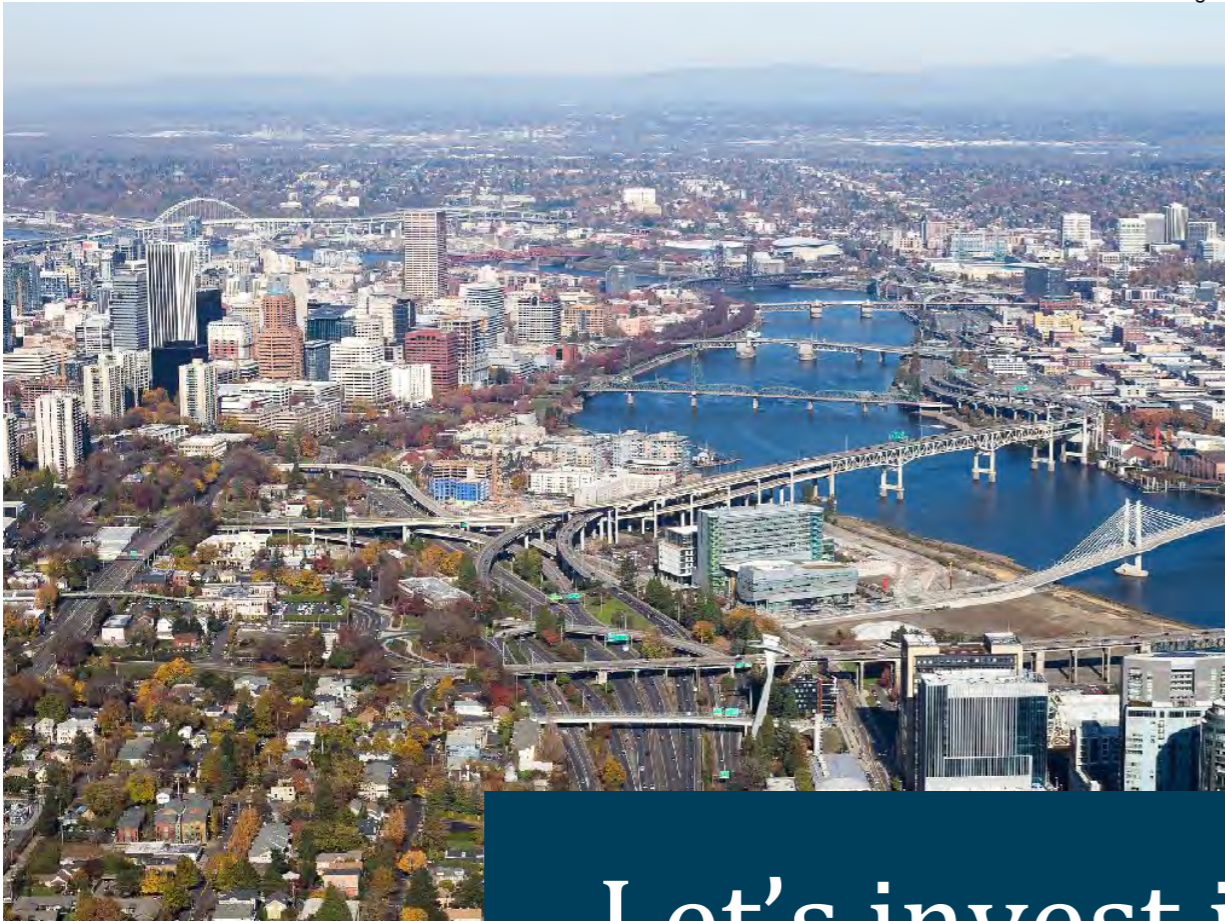
Better Bus



Planning for the Future

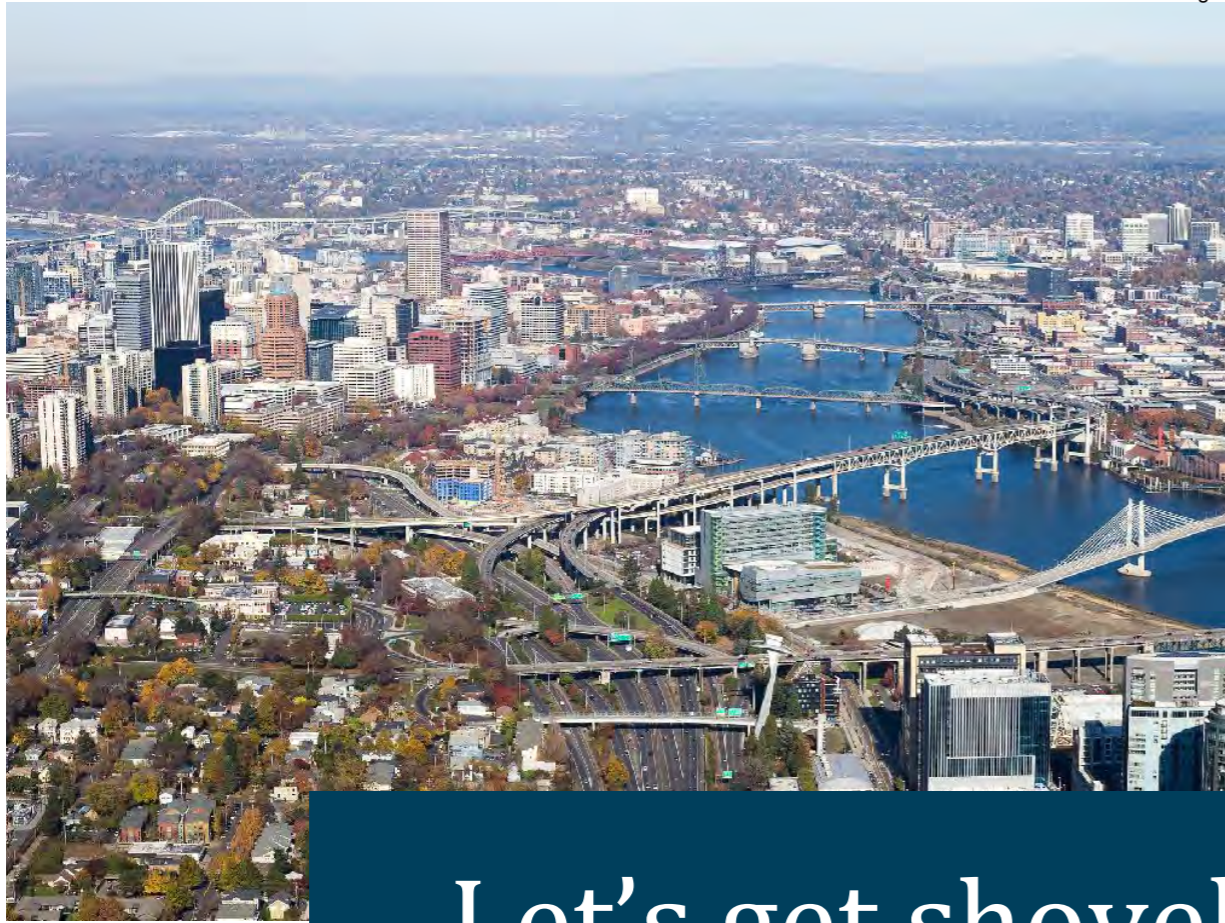
A collaborative vision.





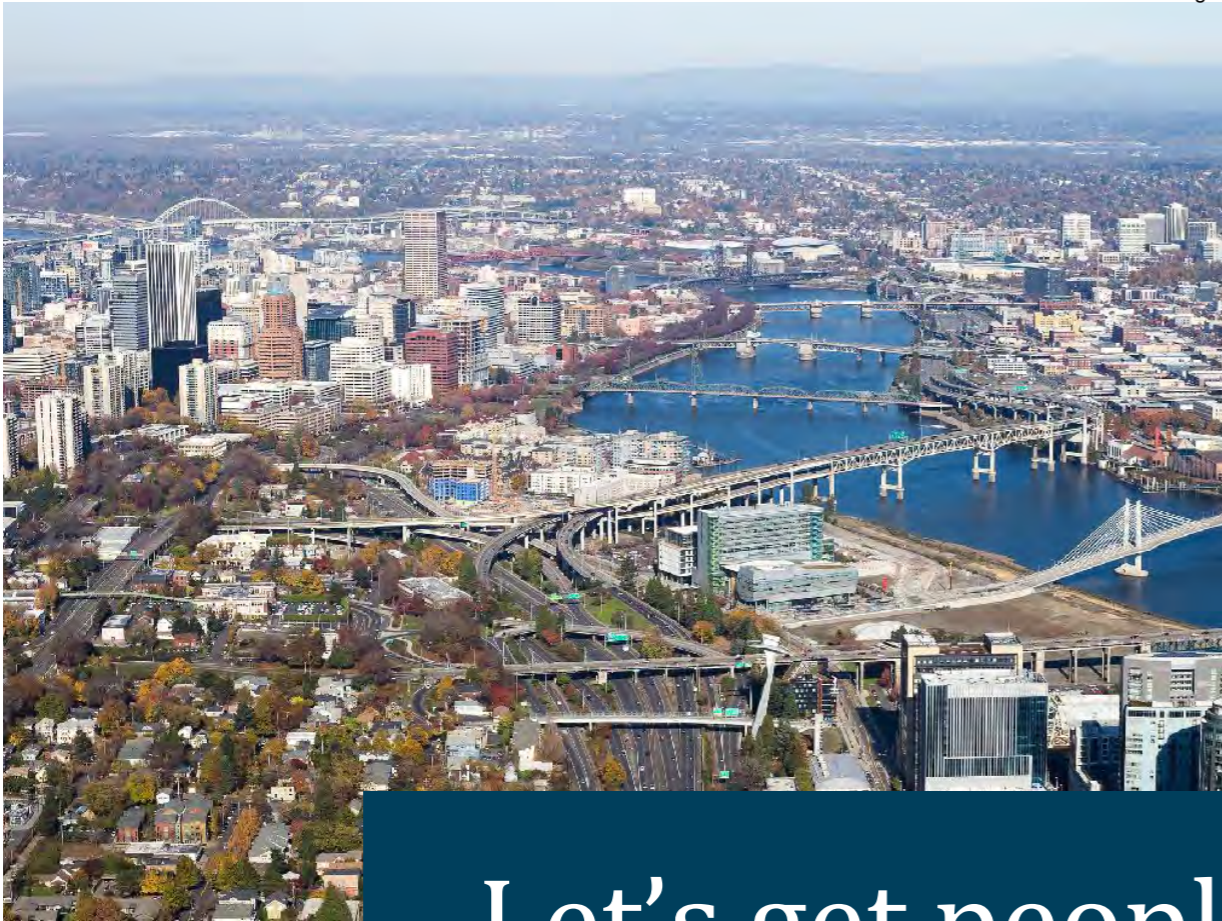
Let's invest in our future.





Let's get shovels in the ground.





Let's get people back to work.





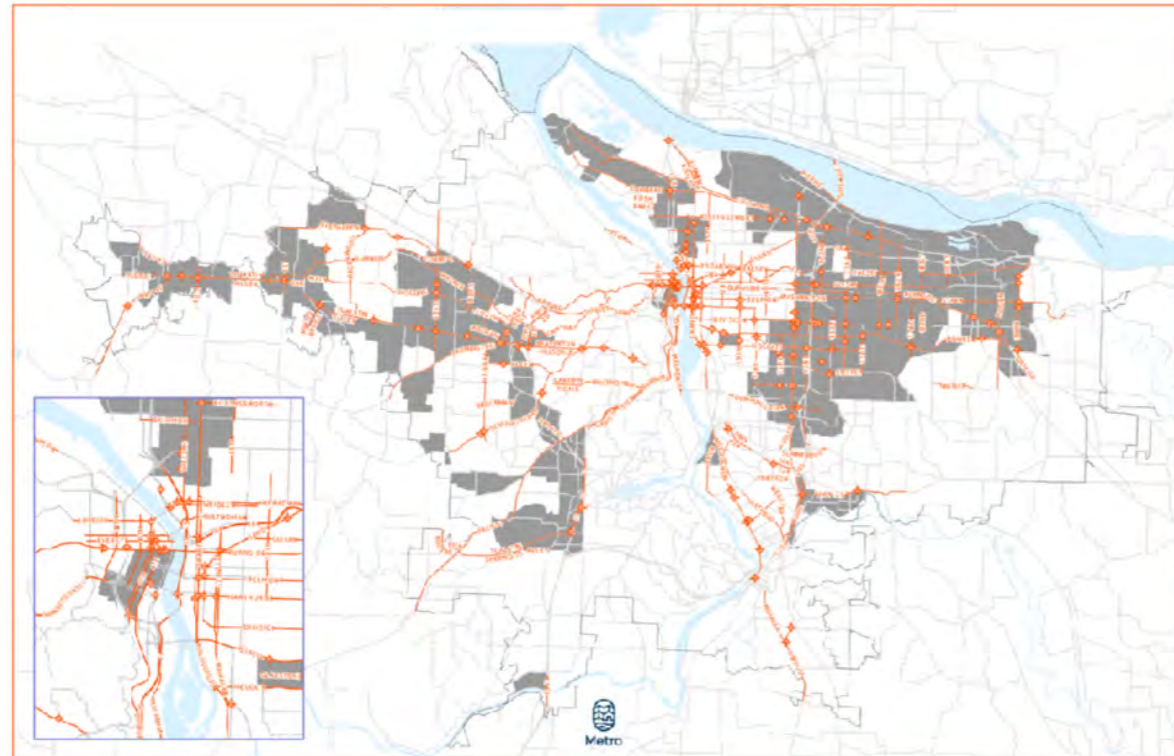
Let's get moving.



getmoving2020.org



Making our roads safer.



86 miles
of safety investments
in high-injury
corridors.

100
Fewer
fatalities

350
Fewer severe
injuries

*Estimated safety benefit over 20 years (typical project lifespan).
Based on an analysis of the safety performance of Tier 1 corridors
and Highway Safety Manual principles, using documented Crash
Reduction Factors also used by FHWA, ODOT, and City of
Portland.*

CLIMATE SMART STRATEGIES

HIGH CO₂ REDUCTION IMPACT



MODERATE CO₂ REDUCTION IMPACT



LOW CO₂ REDUCTION IMPACT







MULTNOMAH
COUNTY
INVESTMENTS

Central City

Burnside

82nd Ave

122nd Ave

162nd Ave

Clackamas-to-
Columbia/181st

Albina Vision

Powell Blvd

Welcome to the **Get Moving 2020 Master Presentation Deck!**

Here's how to use this deck:

STEP 1: Save a copy of this file with your presentation name "Location_Date".

STEP 2: Edit the title slide to include the location and date of your presentation.

STEP 3: Think about the specific needs of your audience. What do they care about most? Do they need the high-level spiel, or will they want more specifics?

STEP 4: Delete any slides you don't need! The "base deck" is slides 1-35. Slides 36 and beyond illustrate other aspects of the measure, including Task Force process, community engagement, racial equity, climate outcomes, and county-by-county project details.

STEP 5: Refer to the GM2020-MasterDeck-SlideNotes.docx for slide-by-slide narrative.

RESOLUTION NO. 2814

A RESOLUTION ADOPTING THE CANVASS OF VOTES OF THE MAY 19, 2020 PRIMARY ELECTION AND AMENDING THE WILSONVILLE CHARTER.

WHEREAS, at the Primary Election held May 19, 2020, the electorate of the City of Wilsonville cast ballots for Ballot Measure 3-556 City of Wilsonville, Charter Amendment for Council Term Limits; and

WHEREAS, Ballot Measure 3-556 asked the following question “Should members of City Council be term limited to serving no more than 12 years in any 20-year period?”; and

WHEREAS, the Primary Election of the registered voters of Clackamas and Washington Counties was conducted by mail; and

WHEREAS, the County Clerk of Clackamas County, who by statute, is in charge of conducting all elections, has filed an abstract of the tally of votes cast at the election, which tally for Clackamas County was duly received by the City Recorder on June 8, 2020; and from Washington County was duly received by the City Recorder on June 5, 2020, copies of which are attached hereto and incorporated by reference.

NOW, THEREFORE, THE CITY OF WILSONVILLE RESOLVES AS FOLLOWS:

1. That the City Council of the City of Wilsonville does hereby adopt the votes of the May 19, 2020, Primary Election as follows:

FOR MEASURE 3-556 CITY OF WILSONVILLE, CHARTER AMENDMENT FOR COUNCIL TERM LIMITS

Clackamas County:	Precinct 201	Precinct 202	Precinct 203	Precinct 204	Totals
Yes	1,401	1,640	805	1,007	4,853
No	729	605	879	414	2,627
Cast Votes	2,130	2,245	1,684	1,421	7,480
Undervotes	99	144	84	61	388
Overvotes	1	0	0	0	1

Washington County:	Precinct 432	Totals
Yes	90	90
No	42	42
Cast Votes	136	136
Undervotes	4	4
Overvotes	0	0

TOTAL VOTES CAST IN BOTH COUNTIES

Clackamas & Washington Counties:	Totals
Yes	4,943
No	2,669
Cast Votes	7,616
Undervotes	392
Overvotes	1

2. Based upon the adopted canvass of votes, the City Council affirms that:
 - a. Ballot Measure 3-556 City of Wilsonville, Charter Amendment for Council Term Limits has been approved by electorate of the City of Wilsonville and the Wilsonville City Charter will be amended to add the following new Section 29 to Chapter VI:

*Section 29. **Term Limits.** No person shall be eligible to serve on the City Council more than twelve (12) years in any twenty (20) year period, whether serving as Councilor, Mayor, a pro tem member, or a combination thereof. No person may be elected or appointed to an office on the City Council if completing that term of office would cause a violation of these term limits. The calculation of "years" shall include those preceding the enactment of this Section, but shall not prevent any member of the City Council from completing a term of office. To be eligible for election or appointment to an office on the City Council, prior years of service on the City Council shall be calculated by first determining the aggregate number of days a person has previously served as a member of the City Council within the period of twenty calendar years prior to the commencement of the proposed term, and then attributing a year of service for every 365.25 days of service within that period.[Section 28 is a Charter Amendment voted upon and approved by a majority of the qualified voters of the City of Wilsonville in the May 20, 2020 Primary Election.]*

- b. Ballot Measure 3-556 has been approved by the electorate of the City of Wilsonville.
 - c. Ballot Measure 3-556 approved the question of limiting the terms of members of the City Council be term limited to serving no more than 12 years in any 20-year period.

3. The City Recorder shall file the Certificates of Election in accordance with the above.
4. This resolution shall be effective upon its adoption.

ADOPTED by the City Council of the City of Wilsonville at a regular meeting this 15th day of June, 2020 , and filed with the Wilsonville City Recorder this date.

Tim Knapp, Mayor

ATTEST:

Kimberly Veliz, City Recorder

SUMMARY OF VOTES:

Mayor Knapp
Council President Akervall
Councilor Lehan
Councilor West
Councilor Linville

Attachments:

1. Certificate of Election
 - A. Abstract of Vote – Clackamas and Washington Counties

**City of Wilsonville
Certificate of the May 19, 2020
Primary Election Results**

State of Oregon)
)
Counties of Clackamas)
And Washington)
)
City of Wilsonville)

I, Kimberly Veliz, do hereby certify that I am the City Recorder and the Election Official for the City of Wilsonville, Clackamas and Washington counties, Oregon, and I state:

1. An election was held May 19, 2020 for the electorate of the City of Wilsonville to cast ballots for Measure 3-556 City of Wilsonville, Charter Amendment for Council Term Limits

2. The May 19, 2020 Primary Election was conducted by mail by the Clackamas and Washington County Elections Division.

3. The County Clerk of Clackamas and Washington Counties, who by statute, is in charge of conducting all elections, has tallied the votes cast for this election and delivered to the City a final copy of the Abstract of Votes, a copy of which is attached as Exhibit A, and incorporated herein.

I hereby certify the results of the May 19, 2020 Primary Election voted upon by the qualified voters of the City of Wilsonville as follows:

- a. That Measure 3-556 City of Wilsonville, Charter Amendment for Council Term Limits passed.

Dated this 15th day of June 2020.

Kimberly Veliz, City Recorder



CLACKAMAS COUNTY

Office of County Clerk

SHERRY HALL
CLERK

1710 Red Soils Court Suite 100
OREGON CITY, OR 97045
503.722.6086

June 8, 2020

BY EMAIL

City of Wilsonville
Attn: Kimberly Veliz
29799 SW Town Center Loop E
Wilsonville OR 97070

Greetings:

Please find attached certified abstract of results of the May 19, 2020 Primary Election conducted in Clackamas County. A hard copy can be mailed by request.

Let us know if any additional information is needed.

Sincerely,

A handwritten signature in green ink, appearing to read "Andrew Jones".

Andrew Jones
Elections Manager

Board of Property Tax Appeals
1710 Red Soils Court, Ste 100
Oregon City, OR 97045
503.655.8662
FAX 503.650.5687

Elections Division
1710 Red Soils Court, Ste 100
Oregon City, OR 97045
503.655.8510
FAX 503.655.8461

Recording Division
1710 Red Soils Court Ste 110
Oregon City, OR 97045
503.655.8551
FAX 503.650.5688

Records Management Division
1810 Red Soils Court, Ste 120
Oregon City, OR 97045
503.655.8323
FAX 503.655.8195

Canvass Results Report

Primary Ballots

Run Time 9:26 AM
Run Date 06/08/2020

Clackamas County, Oregon

May 19, 2020 Primary Election

5/19/2020

Page 219

Official Results

Registered Voters
138710 of 296462 = 46.79%

Precincts Reporting
117 of 117 = 100.00%

Measure 3-556 City of Wilsonville - Nonpartisan Party

Precinct	Yes	No	Cast Votes	Undervotes	Overvotes	Vote by Mail Ballots Cast	Total Ballots Cast	Registered Voters	Turnout Percentage
201	1,401	729	2,130	99	1	2,230	2,230	4,567	48.83%
202	1,640	605	2,245	144	0	2,389	2,389	5,487	43.54%
203	805	879	1,684	84	0	1,768	1,768	2,459	71.90%
204	1,007	414	1,421	61	0	1,482	1,482	3,056	48.49%
Totals	4,853	2,627	7,480	388	1	7,869	7,869	15,569	50.54%

CERTIFIED COPY OF THE ORIGINAL
SHERRY HALL, COUNTY CLERK

BY: Sherry Hall

Official Ballots Cast per Contest with Precincts
Washington County - May 19, 2020

Page: 149 of 164
2020-06-04
11:30:09

All Precincts, All Districts, All ScanStations, All Contests, All Boxes
Total Ballots Cast: 174532, Registered Voters: 369288, Overall Turnout: 47.26%

Measure 3-556 City of Wilsonville, Charter Amendment for Council Term Limits (Vote for 1)

Precinct	Ballots Cast	Reg. Voters	Total Votes	Yes	No	Over Votes	Under Votes
Precinct 432	136	368	132	90 68.18%	42 31.82%	0	4
Total	136	368	132	90 68.18%	42 31.82%	0	4



I, **Margaret Garza**, Interim Director of Assessment and Taxation and Ex-Officio County Clerk for Washington County, do hereby certify this to be a true and correct copy of the original.

Date: June 5, 2020
By: M. Garza
Interim Director



CITY COUNCIL MEETING STAFF REPORT

Meeting Date: June 15, 2020	Subject: Resolution No. 2819 Wilsonville Community Sharing Support Grant Agreement for 2021. Staff Member: Cathy Rodocker, Finance Director Department: Finance	
Action Required	Advisory Board/Commission Recommendation	
<input checked="" type="checkbox"/> Motion <input type="checkbox"/> Public Hearing Date: <input type="checkbox"/> Ordinance 1 st Reading Date: <input type="checkbox"/> Ordinance 2 nd Reading Date: <input checked="" type="checkbox"/> Resolution <input type="checkbox"/> Information or Direction <input type="checkbox"/> Information Only <input type="checkbox"/> Council Direction <input checked="" type="checkbox"/> Consent Agenda	<input type="checkbox"/> Approval <input type="checkbox"/> Denial <input type="checkbox"/> None Forwarded <input checked="" type="checkbox"/> Not Applicable Comments: This resolution authorizes an agreement between the City and Wilsonville Community Sharing, for WCS to provide certain assistance to Wilsonville residents for fiscal year 2020-21 in the total amount of \$52,963.	
Staff Recommendation: Staff recommends Council adopt the Consent Agenda.		
Recommended Language for Motion: I move to approve the Consent Agenda.		
Project / Issue Relates To:		
<input type="checkbox"/> Council Goals/Priorities	<input type="checkbox"/> Adopted Master Plan(s)	<input checked="" type="checkbox"/> Not Applicable

ISSUE BEFORE COUNCIL:

Approve a grant of financial assistance to Wilsonville Community Sharing for fiscal year 2020-21.

EXECUTIVE SUMMARY:

The annual Support Grant Agreement between the City of Wilsonville and Wilsonville Community Sharing (WCS) expires June 30, 2021.

The City of Wilsonville has supported the administrative and operational services of Wilsonville Community Sharing (WCS) through financial support for more than 20 years.

For FY 2020-21, the Approved Budget includes \$52,963; \$36,963 for a general purpose portion dedicated to, but not limited to, providing staffing, food, prescription help, rent & housing support and other services to those community members in need. Additionally, \$16,000 has been provided for utility bill paying assistance. The general purpose portion of the grant has been increased above the FY 2019-20 amount of \$35,921 by \$1,042, representing a 2.9% year over year CPI-West Size A indexed increase.

EXPECTED RESULTS:

The expected result of this agreement is to continue support of WCS.

TIMELINE:

This resolution and agreement would be effective from July 1, 2020, through June 30, 2021.

CURRENT YEAR BUDGET IMPACTS:

There are no current year budget impacts. For FY 2020-21, \$52,963 in General Fund has been budgeted in the City Administration Department.

FINANCIAL REVIEW / COMMENT:

Reviewed by: CAR Date: 6/1/2020

LEGAL REVIEW / COMMENT:

Reviewed by: ARGH Date: 6/10/2020

COMMUNITY INVOLVEMENT PROCESS:

N/A

POTENTIAL IMPACTS OR BENEFIT TO THE COMMUNITY:

Helping those in need through Wilsonville Community Sharing.

ALTERNATIVES:

Not renew the Support Grant Agreement, which would impede the mission of WCS to help community members in need.

CITY MANAGER COMMENT:

N/A

ATTACHMENTS:

1. Resolution No. 2819
 - A. Wilsonville Community Sharing Support Grant Agreement

RESOLUTION NO. 2819

A RESOLUTION OF THE CITY OF WILSONVILLE AUTHORIZING SUPPORT GRANT AGREEMENT WITH WILSONVILLE COMMUNITY SHARING.

WHEREAS, Wilsonville Community Sharing, an Oregon non-profit corporation, has been providing community outreach services, including but not limited to staffing, food, utility bill-paying assistance, prescription help, rent and housing support, and referral to other services beyond that which Wilsonville Community Sharing can meet for those in need; and

WHEREAS, the City of Wilsonville has supported the administrative and operational services of Wilsonville Community Sharing through grant support since fiscal year 1999-2000; and

WHEREAS, since fiscal year 2010-11 the City has provided both a general purpose grant and a separate utility bill-paying assistance grant, collectively referred to as “Grant”; and

WHEREAS, the City has included the Grant within the City Manager’s budget which is subject to review by the Budget Committee and adoption by City Council; and

WHEREAS, Wilsonville Community Sharing has provided detailed quarterly and annual financial statements that include information on services and activities and Grant expenditures; and

WHEREAS, the Grant totaling \$52,963 is included in the FY 2019-20 budget and is composed of \$36,963 for the general purpose portion and \$16,000 for the utility bill-paying assistance portion; and

WHEREAS, the parties agree that it is prudent to enter into a Support Grant Agreement setting forth the respective parties’ rights and obligations for the fiscal year 2020-21 (ending June

30, 2021), ensure a financial reporting and review system, and state the specific purpose for which the Grant monies can be used;

NOW, THEREFORE, THE CITY OF WILSONVILLE RESOLVES AS FOLLOWS:

1. A one-year Grant is awarded to Wilsonville Community Sharing.
2. The City Manager is authorized to enter into for the fiscal year 2020-21 (ending June 30, 2021) a Support Grant Agreement with Wilsonville Community Sharing, an Oregon non-profit organization, in the amount of \$52,963 for the fiscal year 2020-21, under the terms and conditions as set forth in the Support Grant Agreement, a copy of which is marked Exhibit A, attached hereto, and incorporated by reference as if fully set forth herein.
3. This resolution is effective upon adoption.

ADOPTED by the Wilsonville City Council at a regular meeting thereof this 15th day of June, 2020, and filed with the Wilsonville City Recorder this date.

Tim Knapp, Mayor

ATTEST:

Kimberly Veliz, City Recorder

SUMMARY OF VOTES:

Mayor Knapp

Council President Akervall

Councilor West

Councilor Lehan

Councilor Linville

Exhibit:

- A. Wilsonville Community Sharing Support Grant Agreement

EXHIBIT A

**WILSONVILLE COMMUNITY SHARING
SUPPORT GRANT AGREEMENT**

WHEREAS, Wilsonville Community Sharing, an Oregon non-profit corporation, has been providing community outreach services, including but not limited to staffing, food, bill-paying assistance, prescription help, rent and housing support, and referral to other services beyond that which Wilsonville Community Sharing can meet for those in need; and

WHEREAS, the City of Wilsonville has supported the administrative and operational services of Wilsonville Community Sharing through financial support since fiscal year 1999-2000 and has included the grant support in the City Manager's program budget; and

WHEREAS, the fiscal year 2020-21 budget includes a total of \$52,963 for financial support which is separated into a general purpose portion of \$36,963 and a utility bill-paying assistance portion of \$16,000, collectively this is referred to as "Grant"; and

WHEREAS, the general purpose portion of the Grant has been indexed to the West – Size A CPI-W Consumer Price Index from December 2018 to December 2019; and

WHEREAS, the utility bill-paying assistance portion was added in May 2010 in response to a Council Goal to address increased need resulting from the recession during that time period and contained a provision to continue through June 2013 or until the Portland metro area unemployment rate fell below 7%, whichever happened later; and

WHEREAS, the City Council has recognized utility bill-paying assistance is an on-going need and developed guidelines in 2015 for the use of funds for utility bill-paying assistance; and

WHEREAS, Wilsonville Community Sharing has provided detailed quarterly and annual financial statements that include information on services and activities and Grant expenditures; and

WHEREAS, the parties agree that it is prudent to enter into a Grant Agreement setting forth the respective parties' rights and obligations and to establish the Grant for fiscal year 2020-21 (ending June 30, 2021), ensure a financial reporting and review system, and state the specific purpose for which the Grant monies can be used;

NOW, THEREFORE, based on the mutual considerations and provisions set forth below, the parties enter into this Support Grant Agreement ("Grant Agreement") as follows:

1. Purpose of Grant. To provide financial support to Wilsonville Community Sharing for administration and operations to provide community services and outreach to and for community members in need of such services, including but not limited to staffing, food, utility bill-paying assistance, prescription help, rent and housing support, and referral to other services

beyond that which Wilsonville Community Sharing can provide. The financial support provided by the Grant is not for capital construction or renovation.

2. Grant Amount. The amount of the Grant for fiscal year 2020-21 shall be \$52,963, composed of \$36,963 for general support of all programs including administration and \$16,000 dedicated solely to utility bill-paying assistance.

3. Term of Grant. The term of the Agreement commences July 1, 2020 and terminates June 30, 2021, subject to the terms and provisions of this Agreement and Wilsonville Community Sharing providing the community services and outreach set forth in the above Section 1–Purpose.

4. Consumer Price Index Escalator. If the general support portion of the Grant shall be continued into the ensuing fiscal year (FY 2020-21) it shall be indexed to the Bureau of Labor Statistics Consumer Price Index labeled “West – Size A CPI-W”, December-to-December annual change, unless other modifications are approved by the City Council.

5. Utility Bill-Paying Assistance Guidelines. Utility bill-paying assistance shall be granted and administered according to the Utility Bill Paying Assistance Program Guidelines, attached as Exhibit B.

6. Grant Administration.

6.1. The Grant shall be administered by the City’s Finance Director.

6.2. The Grant shall be paid quarterly by the seventh day of each quarter.

7. Reporting.

7.1. Wilsonville Community Sharing shall provide a report to the City on the use of the utility bill-paying assistance portion within three weeks following the end of a calendar quarter. The form of the report shall be similar to the format used in the prior fiscal year.

7.2. Wilsonville Community Sharing shall provide to the City an annual financial report each January setting forth the operational and administrative services and activities provided and the Grant expenditures in support thereof. The reports shall provide the information on services and activities and Grant expenditures for the prior calendar year and a budget from the 1st of January of that reporting year to December 31st of that year.

7.3. Wilsonville Community Sharing shall provide to the City a copy of its full and complete annual Form 990 IRS filing within 10 business days of filing it with the IRS.

8. Finance Review.

8.1. Wilsonville Community Sharing shall maintain books, records, documents, and other materials (collectively referred to as “documents and records”) that sufficiently and properly reflect back-up for all expenditures made pursuant to this Agreement. The City shall have full access to and the right to examine and copy, during normal Wilsonville Community Sharing business hours, all of the documents and records of Wilsonville Community Sharing related to matters covered by this Agreement, whether the documents and records are in electronic form or printed form and whether maintained separately or as part of other financial information. This inspection right shall remain in full force and effect for two (2) years from July 1, 2021.

8.2. Upon fifteen (15) days’ prior written notice, the City shall have the right to conduct an audit or financial review of Wilsonville Community Sharing’s documents and records, as reasonably related to this Agreement. If an audit or review of the documents and records determines that Grant funds have been inappropriately expended by Wilsonville Community Sharing under this Agreement or any federal, state, or City regulation, Wilsonville Community Sharing agrees that it must reimburse the City for the full amount identified by the audit or review as an inappropriate expenditure. Such outstanding amounts shall bear interest at the rate of the Federal Funds Rate (currently at 2.50%), plus 5%.

8.3. If the inappropriate expenditure(s) exceeds five hundred dollars (\$500) Wilsonville Community Sharing will reimburse the City for the cost of the audit or review.

8.4. Wilsonville Community Sharing may contest the audit findings and, if so, the parties will meet to arrive at a mutual resolution. If no resolution can be agreed upon within sixty (60) days, the parties will mutually agree on a review auditor to resolve the dispute or, if the parties cannot agree on a review auditor, either party may ask a Clackamas County judge to appoint a review auditor, whose finding shall be binding on the parties and non-appealable.

9. Grant Confidentiality. In reporting to the City under Section 7 and in reporting the findings of any audit or financial review, the names, social security numbers, medical information, or other information that is confidential under law as may pertain to the clients of Wilsonville Community Sharing shall not be reported and shall remain confidential.

10. Termination.

10.1. The City and Wilsonville Community Sharing may mutually terminate this Grant Agreement at any time.

10.2. The City may terminate this Grant Agreement at the end of the fiscal year in which the Grant has been funded if the City is unable to appropriate sufficient funding to fund the Grant for the ensuing year.

10.3. The City may terminate upon fifteen (15) days’ notice upon an audit or financial review determination of inappropriate expenditure.

10.4. The City may terminate the Grant Agreement immediately upon receiving notice that Wilsonville Community Sharing is no longer providing the services set forth in Section 1–Purpose.

10.5. Wilsonville Community Sharing may terminate this Grant Agreement at the end of any quarter in which it has received funds and it may terminate this Grant at any time, provided it reimburses the City for any unexpended funds received.

11. Authority. The individuals executing this Grant Agreement on behalf of the respective parties thereto each represent and warrant to the other that he/she has the full power and authority to do so on behalf of said party and to bind said party to the terms of this Grant Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Grant Agreement effective this _____ day of _____, 2020.

WILSONVILLE COMMUNITY SHARING

CITY OF WILSONVILLE

By: _____

By: _____

As Its: President

Bryan Cosgrove
As Its: City Manager

I:\wslv community sharing\grant agr comm serv support



CITY COUNCIL MEETING STAFF REPORT

Meeting Date: June 15, 2020	Subject: Resolution No. 2825 A Resolution of the City of Wilsonville Adopting the FY 20/21 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy. Staff Member: Zoe Monahan, Assistant to the City Manager, Mark Ottenad, Public/Government Affairs Director; Mike McCarty, Parks & Recreation Director Departments: Administration; Park and Recreation	
Action Required	Advisory Board/Commission Recommendation	
<input checked="" type="checkbox"/> Motion <input type="checkbox"/> Public Hearing Date: <input type="checkbox"/> Ordinance 1 st Reading Date: <input type="checkbox"/> Ordinance 2 nd Reading Date: <input checked="" type="checkbox"/> Resolution Information or Direction <input type="checkbox"/> Information Only <input type="checkbox"/> Council Direction <input type="checkbox"/> Consent Agenda	<input checked="" type="checkbox"/> Approval <input type="checkbox"/> Denial <input type="checkbox"/> None Forwarded <input type="checkbox"/> Not Applicable Comments: N/A	
Staff Recommendation: Staff recommends that Council approve the Consent Agenda.		
Recommended Language for Motion: I move to approve the Consent Agenda.		
Project / Issue Relates To:		
<input checked="" type="checkbox"/> Council Goals/Priorities	<input checked="" type="checkbox"/> Adopted Master Plan(s)	<input type="checkbox"/> Not Applicable

ISSUE BEFORE COUNCIL:

Adoption of Resolution No. 2825 approving proposed FY 2020/21 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy.

EXECUTIVE SUMMARY:

The Tourism Promotion Committee unanimously recommended on May 19, 2020, adoption by Council of FY 2020/21 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy and the implementing FY 2020/21 Tourism Promotion & Destination Marketing Services Plan.

The FY 2020/21 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy is known by the shorthand “1/5-Year Action/Implementation Plan” or also just the “Tourism promotion business plan.” This plan summarizes the past year’s tourism promotion program, provides a longer-range five-year plan, and details specific components and activities for the upcoming 2020/21 fiscal year.

The committee was moving forward with the Parks & Recreation feasibility assessment and accompanying pro-forma for a hybrid, indoor, multi-use facility aimed at drawing sports tournaments, conferences and other events to Wilsonville, particularly during the slower, lower-demand ‘shoulder season’ months of October through April. The envisioned facility would be capable of handling court sport tournaments (basketball, volleyball, etc.), conferences, trade shows, performing arts and live entertainment, and could include an overnight lodging option if shown to be relevant to success of a multi-use facility. This project was suggested in the original 2014 Tourism Development Strategy and is one of four long-term, special study projects named in each of the past four “1/5-Year Action/Implementation Plans.”

The request for proposal for a “Market Feasibility Study for Year-Round Sport/Event Facility with Possible Lodging Property” was issued on November 15, 2019. Nine qualified proposers submitted responses by the January 7, 2020, deadline. Four finalists were interviewed during the second week of March 2020 and a consultant was selected. However, just as a consultant was selected, the coronavirus started to appear in the United States. The City did not move forward with the contract due to budget concerns. The project was put on hold in March 2020 and funding has been removed at this time. The committee has recommended that the project be reconsidered for funding in FY 21-22.

Based on direction from the City Manager, in response to COVID-19, staff worked with the City’s consultant, JayRay Ads & PR, Inc., to reduce the scope of work and budget by 50% for the FY 2020/21 Tourism Promotion & Destination Marketing Contract. This will allow JayRay to continue to work on the website and provide limited social media engagement during the Governor’s Executive Orders to stay home and during the gradual re-opening phase. As the area begins to re-open Wilsonville will be positioned to start encouraging visitors to come to the area and increase marketing when it is appropriate.

The “1/5-Year Action/Implementation Plan” or “Tourism promotion business plan” is then implemented by a corresponding tourism promotion marketing plan, now formally titled the Tourism Promotion & Destination Marketing Services Plan. This plan includes a Scope of Work that provides extensive details and information on specific marketing promotion programs are utilized by the Explore Wilsonville tourism promotion program.

Background Information

The year 2020 marks the fifth, rolling version of the Tourism promotion business plan, which is updated annually as required by Resolution No. 2541 that created the City’s tourism promotion program and formed the Tourism Promotion Committee. Essentially, this update to the Tourism promotion business plan continues to advance the longer-term five-year strategy of the action plan. That is, the short-term one-year implementation plan seeks to advance the top priorities of the larger five-year action plan.

The FY 2020/21 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy lists Tourism Promotion Committee Members and Committee Meetings, summarizes the past year's accomplishments and lays out a longer-range five-year action plan and a short-term annual one-year implementation plan for FY 2020/21.

EXPECTED RESULTS:

The City's Explore Wilsonville tourism-promotion program continues to operate through FY 2020/21.

TIMELINE:

The City's Explore Wilsonville tourism promotion program continues operation through June 30, 2021.

CURRENT YEAR BUDGET IMPACTS:

The proposed FY 2020/21 Tourism Promotion & Destination Marketing Services Plan is within budget. The City's FY 2020/21 total Park & Recreation Tourism budget includes \$100,000 for tourism promotion and \$25,000 for the City's tourism matching grant program. The tourism-promotion budget was recently reduced by 50% in response to the COVID-19 emergency.

FINANCIAL REVIEW / COMMENT:

Reviewed by: CAR Date: 6/3/2020

LEGAL REVIEW / COMMENT:

Reviewed by: ARGH Date: 6/10/2020

COMMUNITY INVOLVEMENT PROCESS:

Development of the underlying Tourism Development Strategy had considerable public engagement during the 2013/14 timeframe that included participation by a large citizen task force and interviews/surveys with residents and tourism stakeholders. Subsequently, the Tourism Promotion Committee has overseen development of four annual business plans, adopted by Council, and supervision of the City's community tourism matching grant program.

CITY MANAGER COMMENT:

City Council adoption of Resolution No. 2825 for the FY 2020/21 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy appears to be in alignment with and advance both the Tourism Development Strategy adopted by Council in May 2014 and new City Council Goals adopted in May 2019.

ATTACHMENTS:

- A. Resolution No. 2825
 - 1. FY 2021/20 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy, May 19, 2020 and attachments

RESOLUTION NO. 2825**A RESOLUTION OF THE CITY OF WILSONVILLE ADOPTING THE FY 2020/21 FIVE-YEAR ACTION PLAN AND ANNUAL ONE-YEAR IMPLEMENTATION PLAN FOR THE WILSONVILLE TOURISM DEVELOPMENT STRATEGY.**

WHEREAS, the City Council adopted on May 5, 2014, Resolution No. 2468 approving the *Wilsonville Tourism Development Strategy* (“Strategy”), which set forth a blueprint for implementing a tourism strategy for the greater Wilsonville community, including forming a Destination Marketing Organization (DMO) or committee to develop and promote tourism; and

WHEREAS, the City Council adopted on June 15, 2015, Resolution No. 2541 to establish the Tourism Promotion Committee that, among other duties, is to oversee the implementation of the Strategy and develop an annual business plan; and

WHEREAS, the City Council adopted on April 4, 2016, the first annual *FY 2016/17 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy* (“Plan”), a business plan for the tourism promotion program; and

WHEREAS, the City Council adopted on June 19, 2017, the second annual rolling *FY 2017/18 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy* (“Plan”), a business plan for the tourism promotion program; and

WHEREAS, as part of the implementation of the Plan, the City undertook a competitive formal procurement process in 2017 to contract with a tourism development and operations consultant with an option for two (2) one-year contract extensions, and upon completion of the formal procurement process, the City awarded the contract to Vertigo Marketing, LLC; and

WHEREAS, the City Council adopted on Feb. 22, 2018, Resolution No. 2669, which approved the *FY 2017/18 & 18/19 Tourism Promotion Marketing Plan* composed of the “FY 2017/18 & 18/19 Marketing Playbook” Plan, dated February 2018, and supporting “Scope of Work 2018/2019 Advertising & Marketing Services,” dated January 19, 2018, to implement the *Wilsonville Tourism Development Strategy*; and;

WHEREAS, the City Council adopted on March 19, 2018, Resolution No. 2681 that approved a Tourism Advertising and Marketing Services Professional Services Agreement that exercised a

first one-year contract extension with a tourism operations and marketing development consultant that supports implementation Resolution No. 2669; and

WHEREAS, the City Council adopted on July 16, 2018, Resolution No. 2699 the third annual rolling *FY 2018/19 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy* (“Plan”), a business plan for the tourism promotion program; and

WHEREAS, the City Council adopted on July 15, 2019, Resolution No. 2758 the fourth annual rolling *FY 2019/20 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy* (“Plan”), a business plan for the tourism promotion program; and

WHEREAS, the City and Tourism Promotion Committee timely seek to continue the momentum of the “Explore Wilsonville” tourism-promotion program and invited and received proposals from the principals of Vertigo Marketing, LLC after the company dissolved, who composed the FY 2019/20 Tourism Promotion & Destination Marketing Services Plan approved the Committee, to implement an abbreviated, six-month FY 2019/20 Tourism Promotion & Destination Marketing Services Plan for the period of July 1 through December 31, 2019; and

WHEREAS, the City Council adopted on July 15, 2019, Resolution No. 2758 a Tourism Promotion & Destination Marketing Services professional services contact with Velocity Marketing, LLC to implement an abbreviated, six-month FY 2019/20 Tourism Promotion & Destination Marketing Services Plan for the period of July 1 through December 31, 2019; and

WHEREAS, the City on August 20, 2019, published an RFP for ‘Explore Wilsonville’ Tourism Promotion and Development and Destination Marketing Services and received eight (8) qualified proposals by the deadline of September 30, 2019. The Selection Review Committee reviewed all eight proposals on October 18, 2019, and selected four (4) finalists to interview. During the course of interviews that were conducted on November 13, 2019, one firm stood out as the consensus choice of the committee with the highest criteria evaluation: JayRay Ads & PR of Tacoma, Washington, and

WHEREAS, the City Council adopted on December 16, 2019, Resolution 2776 a professional services agreement with JayRay Ads and PR, Inc. to implement the remaining FY 2019/20 and FY 2020/21 Tourism Promotion & Destination Marketing Services Plan; and

WHEREAS, the Tourism Promotion Committee has fulfilled during FY 2019/20 all of the requirements set forth in the founding charter of the Tourism Promotion Committee as described in Resolution No. 2468; and

WHEREAS, the Tourism Promotion Committee worked to produce and voted unanimously on May 19, 2020, to recommend to the City Council adoption of the updated, fifth annual rolling *FY 2020/21 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy*, a business plan for the tourism promotion program;

NOW, THEREFORE, THE CITY OF WILSONVILLE RESOLVES AS FOLLOWS:

1. The City Council adopts *FY 2020/21 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy*, attached hereto as Exhibit 1.
2. This resolution becomes effective upon adoption.

ADOPTED by the Wilsonville City Council at a regular meeting thereof this 15th day of June, 2020, and filed with the Wilsonville City Recorder this date.

Tim Knapp, Mayor

ATTEST:

Kimberly Veliz, City Recorder

SUMMARY OF VOTES:

Mayor Knapp

Council President Akervall

Councilor Linville

Councilor Lehan

Councilor West

Exhibits:

1. FY 2020/21 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy, May19, 2020



FY 20/2021 Five-Year Action Plan and Annual One-Year Implementation Plan for the Wilsonville Tourism Development Strategy



May 19, 2020

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Attachment:

- 1. Explore Wilsonville Tourism Promotion and Development and Destination Marketing Services Audit, produced by JayRay, February 10, 2020**
- 2. Explore Wilsonville Marketing Plan FY 2020-21**

A. Introduction

The Wilsonville Tourism Promotion Committee on May 19, 2020, recommended for adoption to the City Council the fifth rolling Five-Year Action Plan and Annual One-Year Implementation Plan (also known as the “1/5-Year Action/Implementation Plan”) for FY 2020/21. Each year, the committee updates the plan to account for work accomplished during the prior year and to plan for the following year-plus time period.

Members of the committee have worked diligently to advance the objectives of the City Council as outlined in the past year’s FY 2019/20 Five-Year Action Plan and Annual One-Year Implementation Plan as provided for under the authority of Resolution No. 2541 (2015), which created the City’s Tourism Promotion Program; and the *Wilsonville Tourism Development Strategy* adopted by Council in May 2014.

B. Tourism Promotion Committee Members

Housed in the Parks and Recreation Department with support from the City Manager’s Office, the Wilsonville Tourism Promotion Committee is composed of 11 members total, with seven voting positions and five ex-officio advisory positions, as established by Resolution No. 2541, sorted descending alphabetically by last name.

The seven voting members of the committee include:

- **Jeff Brown:** General Manager of Hotel Eastlund, Portland; reappointed to Position No. 3 in August 2017 to full three-year term ending 6/30/20; indicated not seeking another term. Jeff Brown has served the City for seven years total, starting in 2013 as a member of the Tourism Development Strategy Task Force.
- **Darren Harmon, Chair:** General Manager of Family Fun Center; reappointed to Position No. 5 in August 2018 to full three-year term ending 6/30/21.
- **Al Levit:** Retired resident, former bike club coordinator and former City of Wilsonville Planning Commissioner; reappointed to Position No. 4 in August 2017 to full three-year term ending 6/30/20; seeking re-appointment to another three-year term.
- **Beth Price, Vice Chair:** Director of Sales and Marketing for Holiday Inn Hotel & Convention Center Portland South/Wilsonville; appointed mid-term in March 2019 to Position No. 7 with term ending 6/30/2021.
- **Brandon Roben:** CEO of Oaks Amusement Park, Portland; reappointed mid-term in July 2019 to Position No. 2 with term ending 6/30/22.
- **Rohit Sharma:** Owner, RR Hotels Portland, LLC; appointed mid-term in March 2020 to Position No.1 with term ending 6/30/22.
- **Vacant:** Position No. 6 recruitment continues. (Vacated by David Stead in April 2019 with a term ending 6/30/21); resigned April 2019)

The committee includes five non-voting, ex-officio advisory members composed of:

- **Clackamas County Tourism and Cultural Affairs**, dba Oregon’s Mt Hood Territory: Samara Phelps, Executive Director.

- **Washington County Visitors Association (WCVA):** Carolyn McCormick, President/CEO, or designee Sylke Neal-Finnegan, Vice President of Marketing & Communications.
- **Wilsonville Area Chamber of Commerce:** Kevin Ferrasci O'Malley, CEO, or designee Holli Thomas, Member Success Manager.
- **City of Wilsonville Parks and Recreation Department:** Mike McCarty, Director, or designee Brian Stevenson, Recreation Manager; or Erica Behler, Recreation Coordinator.
- **City of Wilsonville City Council:** Councilor Charlotte Lehan, who also serves as the City Council liaison to the committee.

C. Committee Meetings

The committee met on five occasions in FY 2019/20, surpassing the minimum required four meetings per fiscal year pursuant to Resolution No. 2541. Meeting of the committee were held on Oct. 17, and Nov. 13, 2019, to review proposals in response to the Tourism Services RFP and to interview candidate firms. Committee meetings were also held on Feb. 18, April 16, and May 19, 2020.

D. Advancing Tourism Development Priorities

The committee continued to work on the Top-16 priorities, as determined by the committee during the first year of work during FY15/16, of 50 total potential 'actions for success' outlined in the *Tourism Development Strategy* adopted by Council in May 2014.

Tourism Development Strategy: Top Priorities and "Themed Issues" for Additional Work

Strategy No.	Strategy Title / Description
1.1	Establish an Independent 501 (c) (6) Not-for-Profit DMO to be named Visit Wilsonville, now Explore Wilsonville. <i>[Create the organizational framework]</i>
1.3	Increase the Allocation of the Hotel/Motel Transient Lodging Tax (TLT).
1.5	Review Wilsonville Tourism Grants Program.
1.7	Initiate ongoing partnership and relationship-building programs.
2.1	Develop a destination branding strategy for Wilsonville.
5.1	Establish a stand-alone Wilsonville tourism website.
5.2	Introduce an ongoing internet marketing campaign.
5.3	Develop social media programs relevant to key markets.
5.4	Develop database and email marketing programs.
5.5	Optimize the online use of video.
5.6	Optimize linking strategies.
5.11	Develop and maintain a library of high-quality images and videos.
5.12	Optimize the use of website and social media analytics.
5.13	Develop an active content management and co-op marketing program.
5.14	Increase public awareness of the benefits of tourism.
5.16	Conduct ongoing visitor-satisfaction research.

E. Past Year's Accomplishments, FY 2019/20

The Tourism Promotion Committee has had a successful year, advancing key objectives as set-out in the prior fiscal year's plan, the FY 2019/20 Five-Year Action Plan and Annual One-Year Implementation Plan adopted by the City Council through Resolution No. 2758 on July 15, 2019.

Following is an accounting of accomplishments achieved towards meeting FY19/20 objectives.

- **Recruit to fill all voting positions for the Tourism Promotion Committee.**

In March 2020, Mayor Tim Knapp appointed with Council consent Rohit Sharma, owner of the new Hilton Garden Inn currently under construction and 76-brand petroleum stations in Wilsonville, to Position No. 1, which had been vacant during the fiscal year.

- **Elect chair/vice-chair leadership positions.**

Darren Harmon was re-elected as Chair and Beth Price as Vice Chair during the first meeting of the new fiscal year in October 2019.

- **Committee continues to oversee tourism grant programs.**

The committee was set to oversee the tourism grant review and award process for both the City of Wilsonville Community Tourism Matching Grant program and the Clackamas County Tourism Community Partnership Program. Unfortunately, due to the COVID-19 public emergency, City and County management decided to suspend the tourism grant award programs to evaluate the rapidly changing situation; the committee did not meet to allocate the 2020 grants.

- **Tourism Promotion and Destination Marketing Consultant contractor advances components of the Tourism Promotion Marketing Plan.**

Due to the City's prior Tourism Promotion and Destination Marketing Consultant, Vertigo Marketing, sudden dissolution in May 2019 just as the contract was to be renewed for the fiscal year, the committee invited both former principals to submit a proposal for a six-month-long period. For the period July 1 – December 31, 2019, the committee selected Velocity Marketing of Bend, OR, to advance an updated Explore Wilsonville tourism plan, including new social media, updated content on the tourism website ExporeWilsonville.com, and developing a new tri-fold brochure.

During this six-month interim period staff worked with the committee to develop an updated Scope of Work for a Request for Proposal (RFP) that was advertised in August 2019 as a one-and-half year-long contract with two potential annual renewals at the maximum rate of \$200,000/fiscal year. Eight (8) proposals were received and ranked on their responsiveness to the RFP by the committee in October 2019. In November, the committee interviewed four candidates and selected JayRay of Tacoma, WA, to be the successful contractor for the Tourism Promotion and Destination Marketing Consultant position.

JayRay started work on the transition from the Velocity after the contract was finalized in late December 2019. Jay Ray's team immediately started reviewing the marketing plan, website social media, print, and other advertising underway. By February 2020 the social media accounts had new content updated three times per week. JayRay presented results of the tourism promotion and destination marketing review to the committee on February 18, 2020. Recommendations from JayRay include focusing on online and social media promotion,

reducing print media advertising, and scaling back on print-brochure distribution. The intent is to focus the efforts of the committee in areas that can be measured and offer promotions to drive traffic to the Explore Wilsonville website. Additionally, JayRay is exploring the developing of tourism packages that combine lodging in Wilsonville with other themed recreational activities and visits to nearby attractions.

JayRay was providing multiple social media posts weekly and had prepared a spring social media campaign for advancing in April 2020. However, all promotional and social media work was scaled-back and the Spring 2020 marketing campaign was postponed due to concerns regarding COVID-19 Emergency, where the public is instructed to stay home and most hospitality and tourism attractions are shuttered.

The overall marketing effort is to be reevaluated on a constant basis as the COVID-19 pandemic evolves, with three levels of promotional engagement by fiscal quarter: low-activity, ramp-up and back-to-normal. However, longer-term projects are planned to continue as may be feasible, including website re-design and content modifications, building the library of copyright-free authentic images and videos, and monitoring marketing conditions and providing updates to the committee. JayRay has implemented matrix for work product that is provided in their reports to the committee.

- **The committee monitors implementation of the Tourism Promotion Marketing Plan, including features and operation of the tourism website.**

Staff worked with both Tourism Promotion and Destination Marketing Consultants to increase the operation of ExpoloreWilsonville.com. Specifically, the event calendar was regularly updated and maintained as needed, graphic images were modified and additional photos added.

- **Internet/website and social media products are researched and reviewed by staff/contractor with committee to target product recommendation and selection.**

The pocket trips continue to be promoted on the ExploreWilsonville.com website. The new Tourism Promotion and Destination Marketing consultant JayRay has suggested that the number of pocket trips be reduced and more focused. The JayRay team completed an in-depth review in February 2020 that outlined a number of issues for review and potential opportunities. JayRay has focused on increasing the social media posts and growing the number of social media followers. The consultant team had developed a “spring pocket trip sweepstakes” that was postponed due to the COVID-19 pandemic.

The tourism website, ExploreWilsonville.com, has continued to be revised and updated. The new Tourism Promotion and Destination Marketing Consultant contractor has been able to enhance the calendar feature and make sure the needed plugins were available to operate the site and generate needed data from the website. The consultant continues to make updates to the website to make it more user friendly and appealing to visitors.

Committee develops evaluation criteria for Consultant work performance and Benchmark tourism metrics to establish baseline for future quarterly reports.

The Tourism Promotion and Destination Marketing Consultant contractor subscribes to Smith Travel Research (STR), which provides monthly overnight lodging industry metrics on occupancy and revenue based on aggregated data of participating hotels and motels. In addition

to obtaining STR data for Wilsonville lodging properties, Troutdale, a ‘comparable’ market, is also evaluated to compare Wilsonville’s metrics.

The Tourism Promotion and Destination Marketing Consultant contractor has proposed a set of metrics, outlined in the review, to be tracked over time.

- **Continue tourism promotional programs are implemented with key partners.**

The Tourism Promotion and Destination Marketing Consultant contractor is working with regional/state tourism partners for marketing promotion efforts, including Travel Oregon, Travel Portland, Willamette Valley Visitors Association, Clackamas County Tourism and Cultural Affairs (dba Oregon’s Mt. Hood Territory) and Washington County Visitors Association. These joint efforts include purchase of print and online advertising and sharing of travel research.

The prior Tourism Promotion and Destination Marketing Consultant contractor placed print and online ads in AAA Via and Sunset Magazine that also generated lead-requests for information about visiting Wilsonville. JayRay is reevaluating marketing efforts, with less emphasis on print advertising and more focus on social media and search engine optimization.

The Tourism Promotion and Destination Marketing Consultant contractor worked with Parks and Recreation Administration staff to develop fulfillment procedures for lead requests that involved mailing Pocket Trips brochures and responding verbally and in writing to visitor-information requests.

- **Committee develops and recommends to City Council for adoption the update to the FY 20/21 Five-Year Action Plan and Annual One-Year Implementation Plan.**

The committee developed and recommended on May 19, 2020, to City Council adoption of the FY20/21 update to the tourism business plan formally named the FY20/21 Five-Year Action Plan and Annual One-Year Implementation Plan (also known as the “1/5-Year Action/Implementation Plan”).

- **Committee advances a feasibility study for all-weather or indoor, multi-purpose athletic facility (*Tourism Development Strategy item G 3.2*) this year or next.**

As a component of the prior FY19/20 Five-Year Action Plan and Annual One-Year Implementation Plan, the City Council approved a special request of \$100,000 by the committee for the City to undertake a feasibility study of a year-round multi-purpose events facility with a potential lodging addition. Staff researched other examples nationwide of similar facilities and local-government requests for proposals for market-study feasibility

Previous versions of the 1/5-Year Action/Implementation Plan listed two studies—*Tourism Development Strategy item 3.1* ‘Feasibility study for all-weather or indoor, multi-purpose athletic facility for sports tournaments and recreational and entertainment activities’ and item 3.3 ‘Hotel/conference center feasibility study as a follow-onto the Town Center Master Plan redevelopment project’—that in effect have been combined into one study for which a Request for Proposals (RFP) not-to-exceed \$100,000 was issued in December 2019.

A total of nine proposals by leading national firms responding to the RFP were received by the City. Four finalists were identified by staff with input from committee members, interviewed, and one selected; however, the COVID-19 pandemic resulted in suspension of the RFP

process. At this time no specific date is set for resumption; the RFP process and budget carries forward tentatively into FY21/22.

- **Committee develops new brochure for Oregon mass-distribution and I-5 travelers**

Responding to Committee request for more in-state marketing at targeted traveler information locations, staff worked with the Tourism Promotion and Destination Marketing Consultant Velocity Tourism to create a new tri-fold brochure. The full-color print brochure began distribution starting in September 2019 primarily in-state at PDX, Wilsonville-area hotels, select Interstate highway rest areas, and state-border and other strategically located visitor centers via the vendor Certified Folder.

In conjunction with distribution of the new brochure, Tourism Promotion and Destination Marketing Consultant Velocity Tourism produced and purchased prominent display space for an Explore Wilsonville poster at the I-5 Northbound French Prairie Rest Area operated by the Oregon Travel Information Council. The poster encourages travelers to consider overnight lodging and other activities at the next city up the highway at Wilsonville.

The new brochure was intended to highlight key activities in the area and encourage travelers to stay overnight in Wilsonville. The larger, four-panel Explore Wilsonville Pocket Trip guides are still being distributed to anyone who requests information but they are not provided at visitor locations.

E. Five-Year Action Plan for Tourism Development: FY2020/21 – FY2024/25

The longer-range five-year plan recommended by the committee focuses on developing the organizational infrastructure, advancing the marketing/promotion program for Explore Wilsonville tourism-development efforts, and researching larger study-efforts to advance tourism such as the proposed year-round event facility with potential lodging addition.

This fifth, rolling annual one-year implementation action plan follows directly from the committee’s review of the most-pressing, “Top Priorities.” While the committee recognizes that adjustments are to be made to the longer-range plan via annual ‘course corrections’—especially given the COVID-19 pandemic—the five-year plan is outlined below in fiscal years, July 1 of one year to June 30 of the following year.

Year 1
FY 2020/21

1. Conduct Tourism Promotion Committee Business

- **Leadership, Meetings:** Continue recruitment efforts to fill all voting positions for the Tourism Promotion Committee. Elect committee chair/vice-chair leadership positions.
 - **Tourism Grant Programs:** Committee continues to oversee City and County tourism grant programs.
 - **Business and Marketing Plans:** Tourism Promotion and Destination Marketing Consultant contractor advances components of the Tourism Promotion and Destination Marketing Plan that the committee monitors implementation of. Committee develops and recommends to City Council for adoption the update this business plan as the new FY20/21 Five-Year Action Plan and Annual One-Year Implementation Plan.
 - **Staffing Resource:** Committee to consider in conjunction with City Council and management potential addition of dedicated staffing for tourism and cultural affairs, as per recommendation of *Tourism Development Strategy* and pending *Arts, Culture and Heritage Strategy*. Related to staffing or organizational development, committee to discuss potential evolution to independent, nonprofit Destination Marketing Organization (DMO) as called for in the *Tourism Development Strategy*.
2. **Implement the FY20/21 Tourism Promotion Program:** Committee finalizes evaluation criteria for Consultant work performance and Benchmark tourism metrics to establish baseline for future quarterly reports. The visitor profile study (item G 3.1) summer and winter survey report results are analyzed with consideration given to modifying components of the Tourism Promotion Marketing Promotion Plan based on results of the survey.
3. **Advance Study Effort for City to Enhance Tourism Development:** If the COVID-19 pandemic comes to pass timely, consider rekindling the potential RFP for proposed year-round event facility with potential lodging addition. However, the committee may wish to consider other study efforts, including a potential update to the *Tourism Development Strategy*.

**Year 2
FY 2021/22**

- Potential new staff position works with Tourism Promotion and Destination Marketing Consultant contractor to advance Tourism Promotion Program.
- New tourism promotional programs are implemented with key partners.
- Two recommended studies are now integrated into one: Feasibility study for a year-round, multi-purpose facility (item G 3.2) and a hotel/conference center feasibility study as follow-up to Town Center Master Plan redevelopment project (item G 3.4).

**Year 3
FY 2022/23**

- Tourism Promotion and Destination Marketing Consultant contractor continues to advance Tourism Promotion Program as outlined in the Plan.
- Internet/website and social media products are researched and reviewed by staff/contractor with committee to target product recommendation and selection.
- Commence the destination marketing strategy plan (item G.3.3)

**Year 4
2023/24**

- Tourism Promotion and Destination Marketing Consultant contractor continues to advance Tourism Promotion Program as outlined in the Plan.
- Website is further refined and major marketing promotion continues.
- New tourism promotional programs are implemented with key partners.
- Committee recommends to Council to advance formation of nonprofit DMO.

**Year 5
2024/25**

- Tourism Promotion and Destination Marketing Consultant contractor continues to advance Tourism Promotion Program as outlined in the Plan.
- Committee obtains legal assistance; reviews federal and state requirements for forming 501(c)(6) nonprofit DMO called “Explore Wilsonville”; creates bylaws.

F. Annual One-Year Implementation Plan: FY20/21, July 2020 – June 2021

The fifth, rolling one-year implementation plan seeks to advance the top priorities of the larger five-year action plan. Next fiscal year's work plan is segmented into three main sections:

1. **Conduct Tourism Promotion Committee Business:** The committee executes all Council-mandated activities, including:
 - **Leadership:** Elect a chair and vice chair at the first meeting of the new fiscal year.
 - **Meetings:** Hold at least four meetings with quorum attendance during the fiscal year.
 - **Tourism Grant Programs:** Oversee the application process and grant awards of the tourism grant programs, including the City Community Tourism Grant Program and Clackamas County Tourism Community Partnership Program. This assumes that the COVID-19 pandemic has come to pass and regular public programming occurs.
 - **Business and Marketing Plans:** Work with staff and consultant to draft for City Council adoption an updated version of the Five-Year Action Plan and Annual One-Year Implementation Plan and the Tourism Promotion and Destination Marketing Plan for FY20/21. The full, complete FY20/21 marketing plan is to be developed by JayRay, the Tourism Promotion and Destination Marketing Consultant, at a later date due to the uncertainty and timing of the COVID-19 pandemic, likely requiring a review of the new tourism landscape. The overall marketing effort is to be reevaluated on a constant basis as the Emergency evolves, with three levels of promotional engagement by fiscal quarter: low-activity, ramp-up and back-to-normal. Current expectations are for one or two additional quarters of low-activity, followed by implementation of ramp-up phase as businesses re-open to host visitors and then the back-to-normal level of activity.
 - **Staffing Resource:** An *Arts, Culture and Heritage Strategy* is commencing as part of the 2019-22 City Council Goals adopted on May 20, 2019, that reflects a City Council interest in creating a staff position tentatively called Tourism and Cultural Affairs Coordinator in the Parks and Recreation Department. This new position would assume extra duties carried by current staff and provide additional horsepower for Wilsonville tourism and related cultural affairs. Specifically, duties for the new position could include staffing the Tourism Promotion Committee and a potential Arts and Culture Commission; managing the tourism grants process; working more intensely with the Tourism Promotion and Destination Marketing Consultant contractor to extend work-product impact; and interacting with local businesses and regional/state/international cultural-exchange and Sister City organizations and tourism partners to further relationships and create new promotional campaigns that generate economic activity in the Wilsonville area. The committee works with staff and City Council Liaison to refine a position description and job duties for a potential Tourism and Cultural Affairs Coordinator position for consideration by management to be added in the FY21/22 or FY22/23 budget cycle.
2. **Implement the FY20/21 Tourism Promotion Program:** The committee works with staff of the City Manager's Office and Parks & Recreation Dept. and Tourism Promotion and Destination Marketing Consultant contractor to advance both the larger FY20/21 Five-Year Action Plan and Annual One-Year Implementation Plan and the more specific FY20/21 Tourism Promotion and Destination Marketing Plan.

Specific components of the FY20/21 Tourism Promotion Program include:

- **Target Marketing Refinement:** Refining as needed the marketing promotional elements and online/Internet website products and processes. Send regular e-newsletters, create a new marketing content strategy and encourage signups on social media. Package offerings and promotions will be explored to increase social followers and hotel bookings.
- **Focused Day Trips:** Focusing sets of themed “Pocket Trips,” with clear information about their proximity to Wilsonville and map routes. “Pocket Trips” are to achieve stronger brand positioning and a focus on being in “the middle of it all.”
- **Marketing and Promotion:** Producing print and online marketing deliverables and developing promotional products, with a focus on online marketing. Develop a larger, more diverse inventory of copyright-free, authentic photos featuring multiple seasons, types of travelers and varied local destinations.
- **Performance Metrics:** Refining the specific metrics/evaluation criteria to gauge effectiveness of tourism marketing efforts.
- **Public Awareness:** Cultivating increased local residents’ knowledge and interest in learning more about local attractions and the value of tourism to the economy and community-development efforts. Identify Wilsonville’s brand position and the “why Wilsonville” that resonates with locals and builds brand ambassadors.

The original proposed Tourism Promotion budget for FY20/21 submitted in January 2020 totaled \$325,000, which included the funding the full Tourism Promotion and Destination Marketing Contract at \$200,000 and \$75,000 for the RFP process for year-round event facility with hotel; however, due to the COVID-19 pandemic, the revised spending plan is now \$125,000:

Tourism Promotion and Destination Marketing Contract	\$ 100,000
Community Tourism Grants Program	25,000
TOTAL Tourism Promotion Budget FY20/21	<u>\$ 125,000</u>

The committee recognizes, however, that the COVID-19 pandemic that has resulted in stay-at-home orders that depress travel and transient lodging tax collections and the shuttering of most tourism-related and hospitality businesses. Due to both restrictions on travel and anticipated declines in transient lodging tax revenues that fund the tourism promotion program, the Tourism Promotion and Destination Marketing Consultant contract is now planned for a 50% reduction of \$100,000 for FY20/21.

This Tourism Promotion and Destination Marketing Consultant plan has recommended a three-phase marketing plan composed of:

- 1) Low Activity estimated at \$12,500/quarter for the first two quarters (July-Dec. 2020)
- 2) Ramp-up activity estimated at \$25,000 for the third quarter (Jan.-March 2021)
- 3) Normal Level Activity resuming at \$50,000 for the last quarter (April-June 2021)

At this time the Community Tourism Grant Program funds, which were not disbursed via the grant program in FY19/20 and redirected, are scheduled to be continued in FY20/21. Similar to other tourism budget items, these funds are subject to COVID-19 pandemic redirection.

Additionally, approximately \$250,000 of prior unspent transient lodging tax revenue during the period of 2014-2017 has now been used up: \$65,000 was spent on the special Visitor Profile Study project during 2017-2018, and \$200,000 disbursed to hospitality businesses as part of the Wilsonville Small Business COVID-19 Relief Grants Program.

- 3. Advance Study Effort for City to Enhance Tourism Development:** The committee works with staff of the City Manager's Office and Parks & Recreation Dept. to work with Tourism Promotion and Destination Marketing Consultant contractor on one of four specific recommendations to the City Council for study efforts to advance tourism:

- ***Feasibility Study for Year-Round Multi-use Facility with Potential Lodging Addition:***
This project was delayed and ultimately tabled in FY19/20 due to the uncertainty surrounding the COVID-19 pandemic. The committee recommends to the City Council to budget for the next fiscal year (FY21/22) an allocation of \$100,000 for funding of Feasibility Study for Year-Round Multi-use Facility with Potential Lodging Addition. The committee recognizes, however, that the COVID-19 pandemic may impact the actual implementation of this recommendation and that the funds may be redirected.

G. Components of FY20/21 Annual One-Year Implementation Plan of the Tourism Promotion Program in Relation to the 2014 Tourism Development Strategy

Following are more details on the top priorities summarized above for FY20/21 Tourism Promotion Program in relation to the *2014 Tourism Development Strategy's* Top Priorities and “Themed Issues” for Additional Work listed on page 3.

1. Tourism Promotion Committee Business

1.1 Staffing/Contractor Resource: In order to advance components of the Explore Wilsonville tourism development strategy and the Plan, the committee continues advancing work with staff of the City Manager’s Office and Parks & Recreation Dept. to examine a potential new Tourism and Cultural Affairs Coordinator position and to collaborate with the Tourism Promotion and Destination Marketing Consultant contractor to advance the tourism promotion program. The committee may seek to discuss how a City-staffed program could evolve into an independent Destination Marketing Organization.

Authority for recommendation: *Wilsonville Tourism Development Strategy, May 2014, Action Item 1.1:* Establish an Independent 501 (c) (6) Not-for-Profit DMO to be named Visit Wilsonville, now known as Explore Wilsonville. [Create the organizational framework]

1.2 Budget Allocation: The committee recognizes the City intends to dedicate 50% of transient lodging tax revenues for tourism promotion and has budgeted a considerably greater amount of \$325,000 for FY 20/21 for the Tourism Promotion Marketing Plan and the Community Tourism Grant Program.

Authority for recommendation: *Wilsonville Tourism Development Strategy, May 2014, Action Item 1.3:* Increase the Allocation of the Hotel/Motel Transient Lodging Tax (TLT).

1.3 Tourism Grants Programs: The committee has successfully assumed responsibility from the Parks & Recreation Advisory Board over the past three years to oversee the City’s Community Tourism Matching Grants Award Program and Clackamas County’s Community Partnership Tourism Grants Program, with assistance from Parks & Recreation staff.

The committee has worked on fine-tuning the tourism-related grants program to focus on attracting visitors from over 50 miles away who require overnight lodging accommodations, as well as encouraging visitors to linger longer and patronize local businesses when visiting Wilsonville. The committee seeks to cultivate increased tourism awareness among both members of the community and grant recipients. Increasing overnight stays and transient lodging tax revenues is one of the primary goals for the Tourism Promotion Program and Committee, according to Resolution No. 2541.

Authority for recommendation: *Wilsonville Tourism Development Strategy, May 2014, Action Item 1.5:* Review Wilsonville Tourism Grants Program.

2. Implement the FY 20/21 Tourism Promotion Program

2.1 Tourism Branding Strategy: The Tourism Promotion and Destination Marketing Consultant contractor has developed an Explore Wilsonville tourism branding strategy. New

research information may lead to modifications to the larger, over-arching tourism branding strategy that control key messages, marketing content and design and the look and feel of other promotional advertising products for print or online media.

Authority for recommendation: Wilsonville Tourism Development Strategy, May 2014, Action Item 1.1: Develop a destination branding strategy for Wilsonville.

2.2 Tourism Website: The Tourism Promotion and Destination Marketing Consultant JayRay transferred the website, including multiple integrated component applications called “plug-ins” from prior consultant’s accounts, and extensively reviewed the website’s architecture, operational backend and content. The website review was conducted as part of the larger review process to gauge current operations and results, and to provide recommendations for advancement.

Authority for recommendation: Wilsonville Tourism Development Strategy, May 2014, Action Item 5.1: Establish a stand-alone Wilsonville tourism website.

2.3 Content Collection / Organization / Sharing: An important feature for marketing efforts is the ability to use copyright-free content—including text, images and videos—that may be utilized and shared freely or as desired without additional overhead royalty and license expenses. Considerable effort is required to acquire and catalog area attractions, features, etc., that then may be used in website, social media and other platforms. The Tourism Promotion and Destination Marketing Consultant employed professional models and photographers in 2018 to create a suite of copyright/royalty-free images for marketing use. In 2020, Tourism Promotion and Destination Marketing Consultant plans to update the photographs and videos of area attractions to enhance the collection of authentic, original promotional images.

Tourism Promotion and Destination Marketing Consultant contractor is looking at options for the integration of online video and use of linking strategies to drive traffic and search-engine optimization. Integral to developing an image and video content collection is obtaining services of contracted models and photographer/videographer(s).

Authority for recommendation: Wilsonville Tourism Development Strategy, May 2014, Action Item 5.13: Develop an active content management and co-op marketing program; Item 5.11: Develop and maintain a library of high-quality images and videos; Item 5.5: Optimize the online use of video; Item 5.6: Optimize linking strategies.

2.4 Email Marketing: A primary tool of Internet-based marketing is the use of database email “notifiers” to alert interested parties to events, special package deals and other attractors to the Wilsonville area. Tourism Promotion and Destination Marketing Consultant contractor is utilizing email marketing tools, especially ones that are integrated into the website and social media products that encourage ‘opt-in’ sign-ups to receive emails.

Authority for recommendation: Wilsonville Tourism Development Strategy, May 2014, Action Item 5.4: Develop database and email marketing programs.

2.5 Social Media: Social media is a component of the larger online marketing promotional effort. Tourism Promotion and Destination Marketing Consultant contractor is utilizing social media platforms and programs that are targeted to specific niche markets.

Authority for recommendation: Wilsonville Tourism Development Strategy, May 2014, Action Item 5.3: Develop social media programs relevant to key markets.

2.6 Website Analytics: One of the most powerful features of the Internet is to be able to use website traffic data to determine user interests and preferences, problems with the website content or functionality, where users are located, etc. Tourism Promotion and Destination Marketing Consultant contractor has integrated website analytic tools for the website product.

Authority for recommendation: *Wilsonville Tourism Development Strategy, May 2014, Action Item 5.12:* Optimize the use of website and social media analytics.

2.7 Internet Marketing Campaigns: Tourism Promotion and Destination Marketing Consultant contractor is using various kinds of services that are available for Internet marketing promotions that are targeted to specific, niche markets and that utilize database marketing.

Authority for recommendation: *Wilsonville Tourism Development Strategy, May 2014, Action Item 5.12:* Introduce an ongoing internet marketing campaign.

2.8 Wilsonville Visitors Guide and Related Publications: Tourism Promotion and Destination Marketing Consultant contractor is exploring production of one or more print and online versions of a Wilsonville Visitors Guide, as well as other potential publications helpful to visitors and marketers.

Authority for recommendation: *Wilsonville Tourism Development Strategy, May 2014, Action Item 5.7:* Produce a Wilsonville Visitors Guide annually.

2.9 Public Awareness: City staff are to work with the committee and Tourism Promotion and Destination Marketing Consultant contractor to produce information that increases local residents' knowledge and interest in learning more about local attractions and the value of tourism to the economy and community-development efforts.

Authority for recommendation: *Wilsonville Tourism Development Strategy, May 2014, Action Item 5.14:* Increase public awareness of the benefits of tourism.

3. Advance Study Efforts for City to Enhance Tourism Development

The committee recommends to the City Council to plan for the next fiscal year FY21/22 an allocation of \$100,000 for funding of a study or research/planning effort to advance tourism development in the greater Wilsonville market. The committee recognizes, however, that the COVID-19 Emergency may impact the actual implementation of this recommendation.

Feasibility study for year-round multi-purpose facility with potential lodging: Previous versions of the 1/5-Year Action/Implementation Plan listed two studies—3.1 Feasibility study for all-weather or indoor, multi-purpose athletic facility for sports tournaments and recreational and entertainment activities and 3.3 Hotel/conference center feasibility study as a follow-on to the Town Center Master Plan redevelopment project—that in effect have been combined into one study for which an RFP was issued in 2019. The RFP issued in August 2019 for a feasibility study for year-round multi-purpose facility with potential lodging component received nine proposals. Four finalists were identified by staff with input from committee members, interviewed, and one selected; however, the COVID-19 Emergency resulted in suspension of the RFP process. At this time no specific date is set for resumption; the RFP process carries forward tentatively into FY21/22.

The *Tourism Development Strategy* identified that the City may be well positioned to take advantage of non-summer, shoulder-season activities such as youth and league sporting activities

when local lodging occupancy is lower. A feasibility study of a private-sector or public/private partnership development and operation of a year-round event center and adjoining hotel study should include a detailed market analysis, financial feasibility and potential financing strategies.

3.2 Destination marketing strategy plan: The committee recommends that a focused tourism and visitor destination-marketing strategy is developed that complements the City's larger branding strategy in order to maximize branding integration and marketing expenditures. The committee recommends advancing this study during FY21/22 if funds become available.

Authority for recommendation: *Wilsonville Tourism Development Strategy, May 2014, Action Item 4.9:* Support the development of all-weather, multi-purpose playing fields for sports tournaments.

EXPLORE WILSONVILLE TOURISM PROMOTION AND DEVELOPMENT AND DESTINATION MARKETING SERVICES AUDIT

February 4, 2020

Findings & Recommendations

JayRay, the selected agency to represent tourism for the City of Wilsonville, dba Explore Wilsonville, has conducted an audit of past programs, reviewed visitor profile studies and held conversations with industry partners including Wilsonville Chamber of Commerce, Willamette Valley Visitors Association, Clackamas County Tourism & Cultural Affairs (dba Oregon's Mount Hood Territory) and Washington County Visitors Association (dba Visit Tualatin Valley).

Explore Wilsonville's website launched in February 2019, focusing on "Pocket Trips," themed trip inspiration throughout the greater area that positions Wilsonville as an affordable place to stay the night, with convenience to Interstate-5. Pocket Trips is consistently used throughout all marketing and communications, appearing as Wilsonville's brand identity. The nature of Pocket Trips is inspirational but lacks helpful information for the visitor to easily plan a trip. With most Pocket Trips pointing visitors outside of Wilsonville, it leaves Wilsonville's community identity a mystery.

Crafting Wilsonville's brand story will help bring clarity to visitors, elevating awareness and local pride. JayRay will refine Explore Wilsonville's key messages, brand identity and Pocket Trips across all channels to drive overnight stays during the non-summer shoulder season.

The following is a summary of high-level findings and recommendations for JayRay's scope of work, including:

- Marketing
- Email Marketing
- Public Relations
- Photo Library
- Website
- Google Ads
- Social Media



MARKETING

- **Reviewed:** *Brand, Visitor Guide brochure, Certified Folders Distribution plan, Pocket Guide, print and digital ads, ExploreWilsonville.com, marketing plan and report, maps*
- **Findings:**
 - 10 “unique” brand selling propositions; brand color palette is limited and doesn’t match the tone of voice “fun-loving, enlightening, exuberant”
 - Visitor Guide brochure is widely distributed through Oregon’s rest stops and Portland-area hotels through Certified Folders. The Wilsonville Chamber of Commerce also distributes the Visitor Guide (quantity unclear) at the same Wilsonville locations
 - Nearly a quarter of Explore Wilsonville’s annual budget has been spent on the Visitor Guide brochure (production, printing, distribution). ROI is not tracked
 - Visitor Guide brochure is working hard, trying to be all things to all people, from meetings and sports planners to visitors and prospective visitors
 - Pocket Guide brochure is cute but lacks informational details. Similar to the website, it provides cool trip ideas without context of how many days you need, or proximity to Wilsonville
 - Majority of ad budget has been spent on print; with the largest spend in AAA Via. ROI on ads have not been tracked
 - Print ads have focused on one specific Pocket Trip, placed in general interest/travel publications. Messages overpromise (“stroll down our quirky main streets; Wilsonville is close to everywhere”)
 - Marketing Plan goals are not quantifiable. KPIs (Key Performance Indicators) have not been set. Past report on goals has included an overview of tactics performed (vs. measurable outcomes against goals set)
- **Recommendations:**
 1. Identify Wilsonville’s unique brand position and story—*why Wilsonville*—that resonates with locals, ultimately building brand ambassadors
 2. Develop graphic map that highlights Wilsonville’s location to visitors’ top interests (mountains, parks, wineries, etc.) as found in Visitor Profile Study. Incorporate map into existing collateral/website vs. stand-alone map
 3. Shift primary advertising efforts from print to digital, i.e. targeted, trackable channels. Refine visitor guide strategy: distribute visitor guide in Wilsonville and French Prairie Rest Stop to reach visitors in-market, encouraging them to explore more and/or come back. Use more cost-effective, targeted and trackable channels to reach visitors out-of-market
 4. Narrow Pocket Trips to 5 (vs. 10), to achieve stronger brand positioning, differentiation and overall clarity. Re-write Pocket Trips online to make scannable in an itinerary style format, providing necessary details to plan a trip
 - Add a Google Map of Pocket Trips
 5. Develop an integrated marketing plan with measurable goals, and track progress to goals annually. Include a monthly dashboard and report out quarterly
 6. Leverage word-of-mouth marketing to meet visitors where they are, as Visitor Profile Study indicates. Marketing tactics include influencer campaigns and brand ambassador initiatives (examples: ask locals to invite their friends/family to Wilsonville; “Be a Tourist In Your Own Backyard” campaign during National Travel & Tourism Week)



EMAIL MARKETING

- **Reviewed:** *MailChimp*
- **Findings:**
 - Email newsletter has been inactive for 6 months
 - Emails focused on Pocket Trips and the Pocket Trip contest
 - Template is short and includes a nice social call-to-action
 - Upcoming events simply listed with no further details
 - Email subscriber list is 905 contacts
- **Recommendations:**
 1. Create an email marketing content strategy
 2. Create new email newsletter template that highlights upcoming events in a more clear and user-friendly way (Visitor Study shows special events are one main reason visitors stay in Wilsonville). Use to promote tourism packages and repurpose blog
 3. Create growth strategies for list, e.g., encourage signups on social media
 4. Send regular email newsletters (quarterly at minimum)

PUBLIC RELATIONS

- **Reviewed:** *Website, Online Search*
- **Findings:**
 - Online press/media page includes one press release announcing website launch and Pocket Trips campaign
 - Very little media coverage on Wilsonville, only items found came from Wilsonville Spokesman (which does not target overnight visitors)
 - Does not appear PR was part of previous marketing communications strategy
- **Recommendations:**
 1. Develop PR plan to include 4 media themes/stories to promote shoulder-season travel with corresponding PR tactics including media pitches and press releases
 2. Subscribe and respond to HARO (Help A Reporter Out) media opportunities
 3. Develop media lists for 4 approved themes, conduct targeted PR outreach and provide ongoing media follow-up
 4. Attend Travel & Words: Northwest Travel & Lifestyle Writers Conference (May 2020 in Bend) to connect directly with travel writers and promote Wilsonville stories
 5. Micro influencer/travel blogger campaign (bring 3 IG influencers with travel blogs during shoulder season)
 6. Media hosting allowance for FAMS and approved media visits
 7. Build out the online media room to highlight media coverage and releases

PHOTO LIBRARY

- **Reviewed:** *Photo library provided by Velocity; photos provided by City of Wilsonville/Mark*
- **Findings:**
 - Photos lack diversity: type of traveler, age, ethnicity and season travelling
 - Most photos are taken in the summer months showcasing Wilsonville as a summer-friendly destination
 - Photos of most major Wilsonville attractions
- **Recommendations:**
 1. Arrange new photo shoot that focuses on showcasing shoulder-season (Fall/Spring)
 - Models wear clothes to indicate season (long-sleeves, scarves, long pants...)
 2. Increase inventory of dining and wine photos
 3. Keep records of photo/video use agreement and model releases



WEBSITE

- **Reviewed:** *ExploreWilsonville.com, Google Analytics, Google Ads*
- **Findings:**
 - Key takeaway is Wilsonville's location within greater Portland, a "basecamp" for a regional trip
 - Design leans heavily on "Pocket Trips" branding (visual + copy) and only clear call-to-action is to request a brochure
 - Content (photos and copy) focused on peak (summer) travel
 - Pocket Guide itineraries do not clearly demonstrate the attractions proximity to Wilsonville or each other
 - Not optimized for mobile
 - Homepage "slider" not entirely visible on smaller devices, green "Plan Your Fun" box is cut off
 - Mobile menu is cut off
 - Copy is not scannable, requires excessive scroll to view
 - Google Analytics is connected to the site which allows performance to be objectively evaluated (metrics reflect 2/14/19–12/31/19)
 - 33,000 visitors resulted in 61,000 pageviews
 - Average user viewed 1.6 pages per session, spending less than 52 seconds on the site
 - 84% of users are from the U.S.
 - 39% from Oregon (all traffic within an hour of Wilsonville)
 - 24% from California; 14% from Washington
 - 9% of users are from Canada
 - Biggest "referral" site is Facebook (83% of all trackable referrals), next highest are City of Wilsonville, Instagram and Wilsonville Parks & Rec
 - Most visited page is Pocket Trips (19%)
 - Other popular pages are Home (11%), Pocket Trips (6%), Events (4%)
- **Recommendations:**
 1. Redesign homepage to engage visitors by:
 - Promoting year-round activity (i.e. featured blog, event, featured package/promotion)
 - Improve mobile experience (display issues, reduce scrolling)
 - Provide additional calls-to-action (newsletter signup)
 2. Create a strategy to feature partner tourism packages/promotions
 3. Support "basecamp" strategy by providing contextual information on Wilsonville's location to key attractions (map graphic and links to Google Maps itineraries)
 4. Develop SEO strategy to improve "organic" (non-paid) traffic to the website
 - Provide consistent and relevant content visitors are seeking (a blog with inspirational, seasonal content)
 - Provide quarterly content audits to ensure accuracy (i.e. remove broken links)
 - Connect the site to Google Search Console to track the Google Searches that are connecting people with ExploreWilsonville.com



GOOGLE ADS (TO DRIVE WEBSITE TRAFFIC)

- Reviewed: *Google Ads*
- Findings:
 - Campaign targeted off-season travel (ran Sept–Nov)
 - Ad copy was not focused, appealing to all personas (vacation, wine, things to do)
 - Ad copy mentioned “Pocket Trips” which have no meaning to potential visitors
 - Campaign was an expensive tactic to drive traffic to the website
 - Total cost (\$1,465.89) resulted in 1,080 clicks to the website (cost per click of \$1.36)
 - Cost per click and click through rate performed worse than industry averages
- Recommendations:
 1. Discontinue Google ad campaign in favor of more efficient cost per click medium, such as Facebook Ads (Ave. CPC for Travel & Hospitality on FB is \$0.63)

SOCIAL MEDIA

- Reviewed: *Explore Wilsonville social media channels (Twitter, Pinterest, Instagram and Facebook), Facebook Ads Manager*
- Findings:
 - Social content is not tailored for the channel and doesn’t always follow digital content best practices
 - Organic social content rarely links back to the website, not leveraging social channels as a primary driver of website traffic
 - Mismanaged Facebook campaigns with concerning cost-per-results rate, including one campaign where CPR was over \$1,200
 - Content doesn’t answer the question *Why Wilsonville* but is rather generic not touching the mix of inspiration and information that visitors need
- Recommendations:
 1. Create a comprehensive social media strategy
 - Offer strategies to repurpose content among social channels
 - Review “best practices” for digital content
 2. Craft master editorial calendar to balance original and curated content for non-summer months
 3. Stop Twitter. Use Pinterest as it’s inspirational travel planning platform, the second-best for driving website traffic
 4. Post 3-5 times per week for Facebook, Instagram and Pinterest
 5. Provide consistent community management and engagement (scheduling posts, interacting with followers, growing followers)
 6. Use user-generated content (UGC) to show Wilsonville through an authentic and genuine lens
 7. Invest in growing audience with visitors *and* locals through paid page promotions
 - Visitors get information from their friends and family (Explore Wilsonville Visitor Study) so use social channels to boost local love too
 8. Create and maintain measurement dashboard (see **MARKETING**) to ensure we’re on track to meet KPI’s. Dashboard will also help measure social campaigns, boosted posts, etc. to ensure we are getting expected results



TOURISM DEVELOPMENT

- **Reviewed:** *Package offerings, collaboration/grant opportunities with industry partners, partner insights*
- **Findings:**
 - ExploreWilsonville.com does not currently promote tourism packages
 - Past partnerships/co-ops have not been documented or tracked for ROI
 - Most partner DMOs no longer offer “traditional” co-op print ads, as to not dilute their brand/avoid “logo soup.” There may be opportunities for advertorial stories with WVVA in the future
 - Best way to collaborate is to create close relationships with county DMOs (Clackamas and Washington), who work directly with region DMOs (WVVA and Greater Portland). County DMOs are interested in themed packages and promotions that they can use in their own marketing, and include in campaigns
 - WVVA advertises out-of-state and is focused on the Seattle market. WVVA promotes only the Clackamas County portion of Wilsonville and is including Wilsonville hotels in an upcoming Brand USA co-op with Expedia
 - One partner commented: *“You’re not going to make friends by using other people’s attractions to get the room nights...be careful how far out you promote... and don’t promote attractions/events that are highly visited like Multnomah Falls or Wooden Shoe Tulip Fest. If you do, take a sustainability angle and focus promotions on visiting when it’s less crowded.”*
 - Wilsonville residents are unsure of tourism assets and marketing efforts, and are not likely to recommend Wilsonville as a place to visit (Visitor Study)
- **Recommendations:**
 1. Develop overnight packages that align with Pocket Trips for non-summer shoulder season. Share with DMO partners and promote on Explore Wilsonville website and social media. Work with hotels to provide package booking on their websites
 2. Turn Pocket Trips into 1- 2- and 3-day itineraries with easy to use Google maps
 3. Distribute a bi-monthly email to DMO partners with upcoming Wilsonville happenings/packages. Encourage partners to share promotions that feature Wilsonville for documentation and resharing on Explore Wilsonville channels
 4. Be active in tourism development opportunities (e.g. Oregon 21, Willamette River Trail) and determine fit for Wilsonville
 5. Create a thorough list of tourism grants and co-ops (continue to update)
 6. Determine a “promotion area” that’s respectful of DMO partners and neighboring destinations and be consistent (i.e. not to include Oregon Coast). Be mindful of sustainable tourism



Explore Wilsonville Q4: April 1-June 30, 2020

Marketing Activities Update

Due to COVID-19, the budget for marketing has been reduced by 57% for Q4.

Our content strategy has shifted to focus on supporting local hospitality businesses on social media by sharing which businesses are open, as well as stories of community kindness. Our message for visitors has shifted to “dream now, play later.”

This final quarter includes hard costs for the website, time to maintain marketing channels including ExploreWilsonville.com and Explore Wilsonville’s social media channels.

We’re also using this “down time” to make significant design and development updates to the website that will roll out by the end of the quarter, making the site experience better on mobile and desktop. A locator map with custom icons will show that Wilsonville is in the heart of it all.

Also, we’ve begun an audit of the image library and will develop a shot list for a future photoshoot (TBD).



Explore Wilsonville Marketing Plan FY 2020-2021

Due to COVID-19, the budget for marketing has been reduced from \$200,000 to \$100,000 this year. The new budget follows a phased-in approach that will allow us to ramp back up to “normal” funding in April 2021. Due to the fast-changing environment, JayRay will submit a Scope of Work 45 days in advance of the start of each phase/quarter.

Phase 1: July 1-Sept. 30, 2020 [\$12,500]

\$4,167/month

Phase 1 covers hard costs to operate Experience Wilsonville such as website hosting, domains, subscriptions and time to update and maintain marketing channels including ExploreWilsonville.com and Explore Wilsonville’s social media channels (IG, FB, Pinterest).

Monthly reporting will continue—focusing on tracking numbers to determine the impacts of COVID-19, eventually establishing new benchmarks for the following year. We will also continue to receive and monitor the STR report, which was pre-paid in Feb. 2020.

Social media will be the main channel to share “Getaway to Oregon—the Wilsonville Way.” This storytelling approach will get to the heart of what makes Wilsonville unique and target locals and residents of nearby counties to rediscover their own backyard. As travel sentiment grows in Phase 2 / Phase 3, we will adapt our targeting to expand to a drive market. The budget includes \$100/month for boosting social media posts.

Ads will continue in Travel Oregon’s Visitor Guide as well as their website and in NW Travel Magazine (digital/print) as these media buys were made in February 2020.

Phase 2: Oct. 1-Dec. 31, 2020 [\$12,500]

\$4,167/month

Scope of work for Phase 2 will be submitted by August 15, 2020.

Phase 3: Jan. 1-March 31, 2021 [\$25,000]

\$8,333/month

Scope of work for Phase 3 will be submitted by November 16, 2020.

Phase 4: April 1-June 30, 2021 [\$50,000]

\$16,666/month

Scope of work for Phase 4 will be submitted by January 15, 2021.

Explore Wilsonville REDUCED Scope of Work & Budget Detail

TOURISM PROMOTION AND DEVELOPMENT AND DESTINATION MARKETING SERVICES

FY 2019-20: April 1, 2020-June 30, 2020 (Q4)

April 15, 2020

Original Budget: \$100,000 (Jan 1-June 30 2020)

Budget Spent: \$60,198.98 (Jan 1-March 31 2020)

Remaining Budget: \$39,801.02

57% reduction of remaining budget: \$22,557 (due to COVID-19)

New Budget: \$17,244 (April 1-June 30 2020)

MARKETING SERVICES: \$2,000

Deliverables (includes advertising/media spend)	Budget	Reduction
Media buying: identify advertising opportunities, negotiate favorable ad rates, identify insertion dates based on editorial calendar, define ad specs, oversee ad design and production, upload ads to publication. Work with partner organizations on co-op ad buys and other joint promotion efforts. Pre-Paid	\$0	
Art and creative direction, including concepting	\$0	
Ad design (for print and digital)	\$0	
Copywriting (for print and digital ads, marketing collateral)	\$0	
Production	\$0	
Advertising allowance and Media buys (digital/print) to be placed after campaign concepts are approved and media plan has been approved to reach targeted audiences and track performance based on past results. Includes social media boosted posts. <i>May include co-op ad buys with Clackamas County Tourism and Cultural Affairs, dba Oregon's Mt Hood Territory as well as placement in regional visitor guides such as Travel Oregon and Travel Portland</i>	\$0	
Email marketing campaign (e-blasts during shoulder-season, non-summer months (9)) includes content strategy, template development, list management, design and copywriting	\$0	
Reporting* of marketing KPIs *cost included in Management Services		
Develop FY2020-21 Tourism Promotion and Development and Destination Marketing Plan Revised: Develop short-term strategies / prepare for recovery in late Q4	\$2,000	
SUBTOTAL	\$2,000	
REDUCTION (SAVINGS)		\$3,700

FY 2019-20: April 1, 2020-June 30, 2020 (Q4)

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WEBSITE SERVICES: \$5,575

Deliverables	Budget	Reduction
Annual maintenance including software/paid plug-in renewals, website hosting, domain renewal, SSL certificate renewals, security/hack alert scanning, and a technical support plan (necessary theme and plug-in updates, daily cloud backups, 24/7 uptime monitoring and website restored when down within an hour) <i>Includes domain name & SSL Certificate renewals include: ExploreWilsonville.com</i> Hard costs	\$500	
Develop campaign landing page to track advertising, implement Facebook Pixels and UTMs	\$0	
Optimize website for increased mobile responsiveness, shortening the homepage scroll Reallocated \$4,000 for website development, from Collateral/Shipping/Distribution Services	\$4,000	
Develop website content strategy to highlight Wilsonville as an overnight basecamp on homepage; Highlight upcoming events and new content on homepage, focusing on seasonality and shoulder season promotions, ultimately bringing visitors back to the site; enhance Meet landing page and Press & Media landing page to include "why Wilsonville"	\$0	
Provide ongoing content maintenance (attractions, lodging, calendar of events listings, photos and graphics) Revised: Update site with new content/travel advisories	\$1,075	
Content website development (seasonal hero banners, homepage copy, images, maps...)		
Reporting* of website traffic and related KPIs *cost included in Management Services		
Create and implement SEO strategy, including quarterly reports	\$0	
SUBTOTAL	\$5,575	
REDUCTION (SAVINGS)		\$0

FY 2019-20: April 1, 2020-June 30, 2020 (Q4)

Page 3

SOCIAL MEDIA SERVICES: \$2,600

Deliverables	Budget	Reduction
Develop social media strategy (includes an audit of existing channels). Craft a master editorial calendar to include a balance of original and curated content for off-season tourism promotion across Instagram, Facebook and Pinterest (at a glance we recommend focusing efforts on three channels, closing your Twitter account)	\$0	
Write and produce social content (copy and images) 3-5 times per week for three social media channels following approved social media strategy and editorial calendar Revised: post 1-2 times per week on Facebook and Instagram	\$1,600	
Community management and engagement (schedule and post content on three channels, find photos from followers to post, and grow followers) Revised: engage on two channels (FB/IG)	\$1,000	
Reporting* of social media KPIs *cost included in Management Services		
SUBTOTAL	\$2,600	
REDUCTION (SAVINGS)		\$979

PUBLIC RELATIONS SERVICES: \$3,634

Deliverables	Budget	Reduction
Develop PR plan to include 4 media themes/stories to promote shoulder-season travel with corresponding PR tactics including media pitches and press releases	\$0	
Subscribe and respond to HARO (Help A Reporter Out) media opportunities (ongoing, review daily)	\$0	
Develop media lists for 4 approved themes, conduct targeted PR outreach and provide ongoing media follow-up Partially done; finalize Tiny Trips pitch for late summer pitching	\$1,500	
Software subscription to robust Cision Media Database (\$1,000) to provide monthly monitoring, media contact lists, distribution and reporting Subscription hard cost	\$2,134	
Attend Travel & Words: Northwest Travel & Lifestyle Writers Conference (May 2020 in Bend) to connect directly with travel writers and promote Wilsonville stories (also provides opportunity to network and strengthen partner/DMO relationships) Pre-Paid	\$0	
Micro influencer/travel blogger campaign (bring 3 IG influencers with travel blogs, each tasked to promote a different Wilsonville Pocket Trip, during shoulder season). Includes influencer selection, contracts, itinerary building and hosting.	\$0	
Reporting* of public relations KPIs *cost included in Management Services	\$0	
Media hosting allowance for FAMS and approved media visits	\$0	
SUBTOTAL	\$3,634	
REDUCTION (SAVINGS)		\$7,677

FY 2019-20: April 1, 2020-June 30, 2020 (Q4)

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PHOTOGRAPHY SERVICES: \$1,082

Deliverables	Budget	Reduction
Plan for new photography or videography of attractions and events to enhance campaigns and marketing collateral, auditing existing image library Revised: Plan new shoot, audit images	\$1,082	
Arrange for models and releases as needed (recruit locals/volunteers to save on budget), develop storyboards, provide artistic direction and coordinate site locations. Obtain full usage and rights renewals, whenever possible.	\$0	
SUBTOTAL	\$1,082	
REDUCTION (SAVINGS)		\$0

MANAGEMENT SERVICES: \$936

Deliverables	Budget	Reduction
Management of the overall tourism-promotion and destination marketing program (includes accounting for itemized expenses) Revised: minimal project management	\$686	
Developing and operating procedures/systems (fulfillment handled by City Parks and Recreation staff) to include printing, shipping and postage costs	\$0	
Renew memberships to Travel Portland and Oregon Destination Association	\$0	
Software and database subscriptions (STR for Wilsonville and Troutdale: \$4,000 and ISSUU: \$450) monthly subscription (18 months) Pre-Paid	\$0	
Provide quarterly reports of key performance indicators (KPIs) and STR report, in addition to a combined report of contracted services including website, marketing/advertising, social media, PR and visitor fulfillment. Reports will also include a high-level dashboard to track progress against annual goals and previous year's results. Revised: Q-4 report	\$250	
Attend Tourism Promotion Committee meetings in Wilsonville, 6 times per year (9 meetings included in this contract)		
Travel allowance for in-person meetings DONE		
SUBTOTAL	\$936	
REDUCTION (SAVINGS)		\$0

FY 2019-20: April 1, 2020-June 30, 2020 (Q4)

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COLLATERAL, PRINTING AND SHIPPING/DISTRIBUTION SERVICES: \$0

Deliverables	Budget	Reduction
Develop Wilsonville Visitor Guide with simple locator map, based off Google Maps. Includes tri-fold brochure design format to fit Certified Folder racks and copywriting. May launch new design in April.	\$0	
<i>Printing allowance (digital print, full-bleed, trimmed, folded, includes proof) of up to 80,000 copies (approximately 20,000 additional print-run to finish out FY19-20 and 60,000 copies for FY20-21-- TBD based on inventory analysis); includes digital PDF, downloadable from website (*may use contingency to increase printing budget based on existing inventory)</i>	\$0	
Certified Folder brochure distribution allowance	\$0	
<i>Continue distribution pre secured through March 2020 at all (8) State Welcome Centers (includes Portland International Airport) + (6) Rest Stops: Multnomah Falls, French Prairie South Bound, French Prairie North Bound, Santiam, Oak Grove, Mt. Hood + (227) Portland Super Cities + poster-sized display at I-5 French Prairie North Bound per Oregon Travel Information Council (OTIC). Will evaluate distribution and recommend locations for distribution beginning April 2019-June 2021.</i> Reallocated \$4,000 to website development		
Wilsonville Chamber of Commerce brochure distribution	\$0	
<i>Continue distribution with Chamber through June 2020 at local kiosk locations: Holiday Inn, Motel 6, LaQuinta, Quality Inn, SnoozInn, GuestHouse, City Hall, Library, Police, Clackamas Community College, Family Fun Center, Oregon Tech, Pioneer Pacific College, Fir Point Farms, Pheasant Ridge RV, Butteville Store, Aurora Airport. Will evaluate distribution and provide recommendation for FY20-21 to avoid duplication efforts of Certified Folders</i>	\$0	
Postage allowance for visitor center fulfillment by Parks and Recreation staff	\$0	
Freight and shipping to Certified Folder and other distribution outlets as contracted	\$0	
SUBTOTAL	\$0	
REDUCTION (SAVINGS)		\$9,746

FY 2019-20: April 1, 2020-June 30, 2020 (Q4)

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TOURISM DEVELOPMENT SERVICES: \$0

Deliverables	Budget	Reduction
Create and strengthen partnerships and relationships with leading DMOs and partner organizations for the creation of tourism products and packages (start with collaboration email, every other month). Review regional tourism opportunities and apply for grants as available.	\$0	
Collaborate* with managers of local-area attractions, events and visitor/tourism services to produce/package new options that encourage overnight lodging during shoulder season <i>*network/collaborate after Tourism Promotion Committee meetings to save on costs when appropriate, setting up in-person meetings with regional tourism partners</i>	\$0	
Promote and market new or improved tourism products/packages as a result of co-op tourism development efforts <i>*promotion budget included in marketing services</i>	\$0	
Attend ODA Annual Conference in Sunriver to strengthen industry relationships (January 21-23, 2020) and again in January 2021 2020 done	\$0	
SUBTOTAL	\$0	
REDUCTION (SAVINGS)		\$455

EXPLORE WILSONVILLE SCOPE OF WORK TOTAL REDUCED BUDGET

FY 2019-20: April 1, 2020-June 30, 2020 (Q4)

BUDGET (NEW)	\$15,827
Contingency Fund	\$1,417
TOTAL BUDGET	<u>\$17,244</u>
TOTAL REDUCTION (SAVINGS)	<u><u>\$22,557</u></u>

FY 2019-20: April 1, 2020-June 30, 2020 (Q4)

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BILLABLE RATES

Additional work performed outside this scope of work will be billed at a blended rate of \$175 per hour.

JayRay Hourly Rate Schedule by Service

Production Design: \$150

Creative Direction/Graphic Design (Designer): \$175

Web Design/Development: \$150

Project Management: \$175

Copywriting (social media, marketing, PR): \$175

Strategy: \$200

Videography: \$165 or \$1,500 day rate

Photography: \$150

ROUNDS OF REVISION

All work includes one round of major revision, or two rounds of minor revisions to stay within budgeted hours.

ADDITIONAL EXPENSES

If appropriate, other expenses are billed at the current U.S. General Services Administration Per Diem Rates for Oregon or other appropriate location for Lodging and Meals & Incidentals.



CITY COUNCIL MEETING STAFF REPORT

Meeting Date: June 15, 2020	Subject: Resolution No. 2822 Public Transportation Agency Safety Plan (PTASP) Approval Staff Member: Dwight Brashear, Transit Director and Eric Loomis, Transit Operations Manager Department: Transit	
Action Required	Advisory Board/Commission Recommendation	
<input checked="" type="checkbox"/> Motion <input type="checkbox"/> Public Hearing Date: <input type="checkbox"/> Ordinance 1 st Reading Date: <input type="checkbox"/> Ordinance 2 nd Reading Date: <input checked="" type="checkbox"/> Resolution <input type="checkbox"/> Information or Direction <input type="checkbox"/> Information Only <input type="checkbox"/> Council Direction <input type="checkbox"/> Consent Agenda	<input type="checkbox"/> Approval <input type="checkbox"/> Denial <input type="checkbox"/> None Forwarded <input checked="" type="checkbox"/> Not Applicable Comments: N/A	
Staff Recommendation: Staff recommends that Council approve the Consent Agenda.		
Recommended Language for Motion: I move to adopt the Consent Agenda.		
Project / Issue Relates To:		
<input type="checkbox"/> Council Goals/Priorities	<input type="checkbox"/> Adopted Master Plan(s)	<input checked="" type="checkbox"/> Not Applicable

ISSUE BEFORE COUNCIL:

South Metro Area Regional Transit (SMART) is required by Federal Transit Administration (FTA) to have a Public Transportation Agency Safety Plan (PTASP) certified by December 31, 2020 to meet guidelines and continue to receive federal funding.

EXECUTIVE SUMMARY:

The Federal Transit Administration (FTA) is requiring all transit agencies to submit a certified Public Transportation Agency Safety Plan (PTASP) by December 31, 2020. South Metro Area Regional Transit (SMART) has partnered with Oregon Department of Transportation (ODOT) to complete a PTASP to fulfill FTA requirements.

EXPECTED RESULTS:

The approval of the PTASP will provide SMART with a guiding document to enhance safety processes and procedures. Once approved, SMART will seek certification of the document with ODOT to comply with FTA guidelines.

TIMELINE:

June 2020	City Council Approval
June/July 2020	Certification of Compliance (ODOT)
December 31, 2020	FTA Final Acceptance Date

CURRENT YEAR BUDGET IMPACTS:

The PTASP does not have any budget impacts to SMART. The creation of the guiding document was paid for by ODOT.

FINANCIAL REVIEW / COMMENT:

Reviewed by: CAR Date: 5/20/2020

LEGAL REVIEW / COMMENT:

Reviewed by: BAJ Date: 5/26/2020

COMMUNITY INVOLVEMENT PROCESS:

N/A

POTENTIAL IMPACTS OR BENEFIT TO THE COMMUNITY:

Employees and customers are SMART's most precious assets, and their safety and security are among SMART's greatest responsibilities. While the elimination of unsafe conditions and the prevention of accidents in SMART's transportation system and facilities are the responsibility of each employee, they are first and foremost the responsibility of SMART's leadership team.

SMART personnel, associated contractors, and vendors are responsible for promoting and ensuring the safety and security of all customers, employees, property, and the public through specific Safety Management Systems as outlined in this Public Transportation Agency Safety Plan.

ALTERNATIVES:

N/A

CITY MANAGER COMMENT:

N/A

ATTACHMENTS:

1. Resolution No. 2822
 - A. SMART Public Transportation Agency Safety Plan

RESOLUTION NO. 2822

A RESOLUTION OF THE WILSONVILLE CITY COUNCIL ADOPTING THE SOUTH METRO AREA REGIONAL TRANSIT (SMART) PUBLIC TRANSPORTATION AGENCY SAFETY PLAN (PTASP).

WHEREAS, the Public Transportation Agency Safety Plan (PTASP) regulation implements a risk-based Safety Management System approach and requires recipients or subrecipients of financial assistance under the Federal Transit Administration's (FTA) Urbanized Area Formula Program (49 U.S.C. § Section 5307) to establish and certify that they have an Agency Safety Plan in place that meets statutory requirements no later than December 31, 2020, as required by 49 U.S.C. § 5329(d)(1); and

Commented [GA1]: Unnecessary to include since we don't do rail.

WHEREAS, South Metro Area Regional Transit (SMART) is a recipient or subrecipient of financial assistance under FTA's Urbanized Area Formula Program (49 U.S.C. § Section 5307); and

WHEREAS, small public transportation providers operating 100 or fewer vehicles in peak revenue service across all non-rail fixed route modes may have their states draft the PTASP on their behalf; and

WHEREAS, SMART requested Oregon Department of Transportation (ODOT) to assist in the development of a PTASP to ensure SMART meets all statutory requirements; and

WHEREAS, states must certify safety plans on behalf of small public transportation providers that operate 100 or fewer vehicles in peak revenue service within their states; and

WHEREAS, ODOT must certify SMART's PTASP no later than December 31, 2020; and

WHEREAS, SMART's PTASP must be approved and signed by the Accountable Executive, the Transit Director; and

WHEREAS, SMART's PTASP must be approved by Wilsonville City Council annually.

NOW, THEREFORE, THE CITY OF WILSONVILLE RESOLVES AS FOLLOWS:

1. The Wilsonville City Council hereby adopts the Public Transportation Agency Safety Plan, presented as Exhibit A attached hereto and incorporated herein.
2. This resolution becomes effective upon adoption.

ADOPTED by the Wilsonville City Council at a regular meeting there of this 15th day of June, 2020, and filed with the Wilsonville City Recorder this date.

Tim Knapp, Mayor

ATTEST:

Kimberly Veliz, City Recorder

SUMMARY OF VOTES:

Mayor Knapp

Council President Akervall

Councilor Lehan

Councilor West

Councilor Linville

EXHIBIT:

A. SMART Public Transportation Agency Safety Plan

RESOLUTION NO. 2822

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MAY 2020

EXECUTIVE SUMMARY STATEMENT

South Metro Area Regional Transit (SMART) was organized with the mission of providing safe, reliable, and cost-effective transportation services to our customers. Safety and security are paramount to SMART, its employees, its vendors, its contractors, and to the customers it serves. Therefore, all SMART personnel, associated contractors, and vendors are responsible for promoting and ensuring the safety and security of all customers, employees, property, and the public through specific Safety Management Systems as outlined in this Public Transportation Agency Safety Plan.

All employees, vendors, and contractors of SMART are expected to accomplish their tasks safely, with the goal of always preventing, controlling, and minimizing undesired events, such as customer or employee injury, equipment or property damage, or degradation to system safety and security in any of the SMART transportation systems. Employees and our customers are SMART's most precious assets, and their safety and security are among SMART's greatest responsibilities. While the elimination of unsafe conditions and the prevention of accidents in SMART's transportation system and facilities are the responsibility of each employee, they are first and foremost the responsibility of SMART's leadership team. SMART's leadership team is responsible for developing programs to promote the safety and security of all employees and customers. SMART is fully committed to providing a safe and secure work environment, vehicles, systems, and facilities. The SMART leadership team will promote safety and security throughout the organization. The Transit Director, along with the management team, will be continually and directly involved in formulating, reviewing and revising safety and security policies, goals, and objectives. SMART's leadership team will provide the authority, support, and resources to establish and maintain high safety and security standards throughout the organization. To this end, the Transit Director approves the development, distribution, implementation, and administration of a comprehensive and integrated Public Transportation Agency Safety Plan.

Each SMART employee, vendor, and contractor is governed by the requirements and terms of these plans, and must conscientiously learn and follow prescribed safety and security rules and procedures. Each employee must operate safely, use equipment, tools and materials properly, and be trained in the work rules and procedures for his/her area of responsibility, including contingency plans for abnormal and emergency conditions. Each employee shall take an active part in the hazard identification and reporting process, as well as identifying and reporting suspicious packages, behavior, and other security threats. Management shall actively participate in a hazard/threat assessment and resolution process and shall receive the full cooperation and support of the Transit Director to prioritize safety and security.

The Public Transportation Agency Safety Plan is the governing document encompassing all of SMART's modes of transportation including: fixed-route, demand response, and non-revenue operations. The document identifies tasks and requirements to be applied at all levels of SMART's organization using specific Safety Management System practices.

Dwight Brashear, Director/Accountable Executive

Date

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PUBLIC TRANSPORTATION AGENCY SAFETY PLAN

1. SYSTEM DESCRIPTION/ORGANIZATIONAL STRUCTURE

1.1 Agency Information

South Metro Area Regional Transit (SMART) is owned and operated by the City of Wilsonville and is governed by Wilsonville City Council. The department is supported by a Wilsonville payroll tax and by State and Federal grant funding, including Federal Transit Administration (FTA) Section 5307, 5310, and 5339 funding.

1.2 Accountable Executive and Chief Safety Officer

Accountable Executive: Dwight Brashear, Director

Chief Safety Officer: Eric Loomis, Operations Manager

1.3 SMART and Fleet Services Facilities

Administrative Office and Fleet Services
28879 Boberg Road
Wilsonville, OR 97070

These facilities serve as dispatching points for bus service, management offices, and vehicle maintenance.

City of Wilsonville's Fleet Services maintains all SMART vehicles, equipment, and facilities and performs routine maintenance in accordance with manufacturers' manuals, codes, standards, and established procedures. The overall philosophy is to maintain a level of readiness that will ensure safe, efficient, and reliable public transit for the City of Wilsonville.

1.3.1 Scope of Service

The current revenue service characteristics are as follows:

Monday through Friday	5:00 a.m. to 11:30 p.m.
Saturday	8:30 a.m. to 6:00 p.m.

1.3.2 Fleet

SMART operates 33 active buses as of December 2019. The number of buses in SMART's fleet is determined by the projected annual bus schedule requirements with additional spares, to account for buses in maintenance and inspection, or awaiting repair. The average age of the active bus fleet was seven (7) years as of December 2019. SMART buses are 100% accessible for the elderly and persons with disabilities.

1.3.3 SMART Safety Capabilities

- On-board video recorders and cameras
- Fire extinguishers
- Window emergency exit latches

- Fire suppression/CNG warning system
- Brake/door interlock system
- Emergency entrance and exit door releases
- Parking lots and transit center facilities with security lighting

2. PLAN DEVELOPMENT, APPROVAL, AND UPDATES

2.1 Purpose for Public Transportation Agency Safety Plan (PTASP)

The purpose of the PTASP is to set forth the requirements for identifying, evaluating, and minimizing safety risks throughout all elements of SMART including the relationships and responsibilities with city departments and other organizations and agencies which affect transit system safety. The PTASP is the blueprint for SMART’s efforts in strengthening its overall safety management and its goal of continuous improvement in safety performance using Safety Management Systems (SMS) methods.

Name of Entity That Drafted This Plan	Oregon Department of Transportation (RLS & Associates) in cooperation with SMART	
Signature by the Accountable Executive	Signature of Accountable Executive	Date of Signature
	_____ Dwight Brashear, Transit Director	
Approval by the Board of Directors or an Equivalent Authority	Name of Individual/Entity That Approved This Plan	Date of Approval
	Wilsonville City Council	
	Relevant Documentation (title and location)	
	_____ Tim Knapp, Mayor	
Certification of Compliance	Name of Individual/Entity That Certified This Plan	Date of Certification
	Relevant Documentation (title and location)	

2.2 Annual Review

The PTASP is reviewed annually to:

- Evaluate all safety tasks for appropriateness as SMART improves and expands;
- Refine and improve the current task descriptions and activities;
- Identify new tasks which may be required as SMART expands; and
- Identify the organization(s) responsible for accomplishing the newly-added safety-related tasks.

2.3 Control and Update Procedures

The PTASP analysis, review, revision, and publication process is the responsibility of the Chief Safety Officer (CSO). The Transit Director is responsible for the control and update of the PTASP. Input for these annual reviews is solicited from all SMART managers, the Assistant City Manager, City Manager, and other regulatory agencies. SMART will evaluate the Plan in October of each year.

2.4 Implementation

The Transit Director has specific responsibilities for the management, oversight, and delegation of: system safety, hazard management, occupational safety and health, accident and incident investigation, oversight of construction safety, safety and security certification, environmental management, safety training, and for monitoring the effectiveness (internal safety review) of the implementation of the PTASP.

The Transit Director has delegated CSO with the day-to-day operational leadership of the department and responsibility for establishing and implementing policies, procedures, and programs to ensure that SMART is effectively implementing its responsibilities under the PTASP. The Transit Director has delegated the CSO to collaboratively implement employee safety, industrial safety, and occupational safety training aspects of the PTASP. The Transit Director has delegated to the CSO the responsibility of overseeing all related aspects of the PTASP including the bus operations, bus maintenance, and safety programs for pedestrians and bicyclists.

3. SAFETY PERFORMANCE TARGETS

Annual Safety Performance Targets

*Based on the safety performance measures established under the National Public Transportation Safety Plan.
Based on FY 2018 NTD Report Period*

Mode of Service	Fatalities (total)	Fatalities (per 100k VRM)	Injuries (total)	Injuries (per 100k VRM)	Safety Events (total)	Safety Events (per 100k VRM)	System Reliability (failures/VRM)
Fixed Route/Deviated Fixed Route	0	0	0	0	0	0	21,324
Demand Response/ ADA Paratransit	0	0	0	0	0	0	14,206

Safety Performance Target Coordination		
Coordination with the State and Metropolitan Planning Organization (MPO) in the selection of State and MPO safety performance targets.		
SMART coordinates with Oregon Department of Transportation (ODOT) and Metro, Portland's MPO, to establish and maintain safety performance targets.		
Targets Transmitted to the State	State Entity Name	Date Targets Transmitted
	ODOT	
Targets Transmitted to the Metropolitan Planning Organization(s)	Metropolitan Planning Organization Name	Date Targets Transmitted
	Metro	

4. SAFETY MANAGEMENT POLICY STATEMENT

South Metro Area Regional Transit (SMART) is committed to providing safe, secure, clean, reliable, and efficient transportation services to its patrons. This policy statement serves to express management’s commitment to and involvement in providing and maintaining a safe and secure transit system using Safety Management Systems (SMS) as its foundation. In the interest of safety and security, SMART has developed and adopted this Public Transit Agency Safety Plan (PTASP and also referred to as ‘the Plan’). The Plan is intended to document all policies, functions, responsibilities, etc., of the agency necessary to achieve a high degree of system safety and applies to all areas of the transportation system, including procurement, administration, operations, maintenance, etc.

SMART management is responsible for maintaining a coordinated safety system in order to identify and prevent unsafe acts and conditions that present a potential danger or threat to public safety. Management has responsibility for maintaining and implementing the Plan and complying with the policies, procedures, and standards included in this document. All departments, personnel, and contract service operators are charged with the responsibility of adhering to this Plan. Any violation of safety and security practices is subject to appropriate administrative action. Management is ultimately responsible for enforcing the Plan, ensuring resources are available to sustain the Plan and maintaining a safe and secure system.

The goals of the Plan are to ensure the safety and security of SMART customers, employees, first responders to incidents, the public, equipment, and infrastructure throughout the life of the system.

Plan objectives are to define safety-related activities, management controls, and to plan and establish a process for monitoring and ensuring safety in accordance with SMART's Mission Statement and values.

The purpose of these goals and objectives is to minimize the exposure of the public, personnel, and SMART property to hazards and unsafe conditions; and to ensure that no single point of failure of a system or equipment results in an unsafe condition. These goals and objectives are reflected in the planning, design, construction, operation, and maintenance of the system. The goals and objectives are accomplished through the performance of the following functions:

- Safety, fire protection, and emergency management considerations are incorporated into all design and specification development and design reviews for the system;
- Hazards associated with SMART's system are identified, assessed, and then eliminated or minimized to attain an acceptable level of risk;
- A safety culture is instilled throughout SMART that emphasizes preventive measures over corrective measures to eliminate unsafe conditions;
- All managers, supervisors, and employees comply with Federal and State OSHA Standards, local codes, and environmental regulations.

Dwight Brashear, Accountable Executive

Date

4.1 Policy Communication

4.1.1 Safety Policy Communication

This PTASP is updated on an annual basis, but modifications may happen at any time during the year. If a change is made to the Plan, SMART notifies all staff through daily communication methods, posted memos, and daily posted notifications. Depending on the significance of the change, immediate training may take place or incorporated into the annual training curriculum.

4.1.2 State and MPO Communication

SMART annually shares safety performance targets with the local Metropolitan Planning Organization, Portland Metro Council, and Oregon Department of Transportation to assist with their planning activities. SMART makes every effort to coordinate with these two agencies to the extent possible.

Safety and Security of the Oregon Public Transportation Plan (OPTP) aligns with the key components of the Federal Transit Administration's Safety Management System (SMS) principles in the Public Transportation Safety Action Plans. Goal 6 of the OPTP and SMS principles extend safety and security beyond vehicles and stations and include transit personnel, riders and the surrounding community. Safety is a basic expectation of all public transportation users and providers. Both the OPTP Goal 6 policies and strategies and the SMS principles encourage greater safety of the public transportation system through a range of strategies that proactively address design factors, personnel training, use of safety

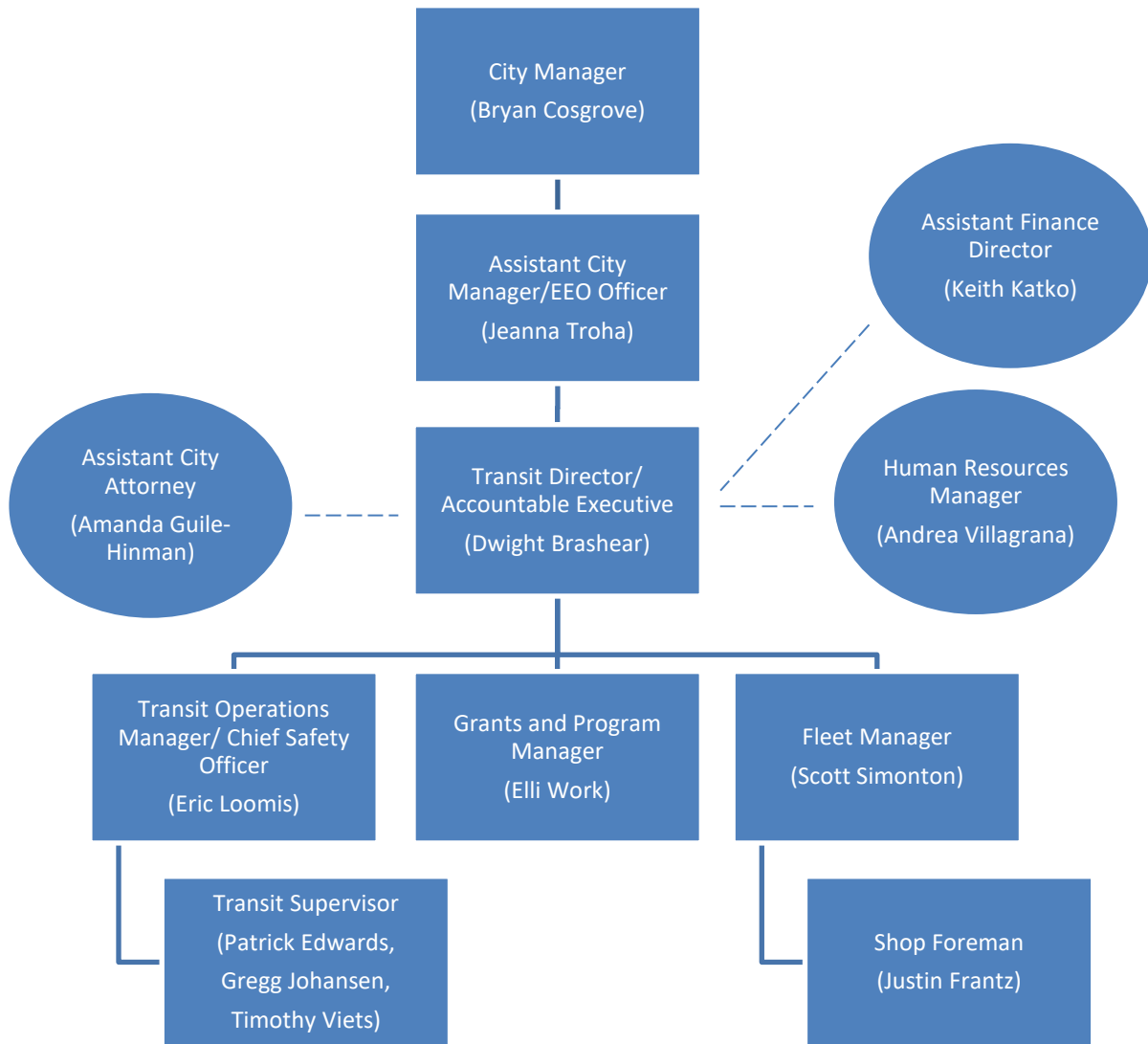
technologies, accident investigation and emergency management planning. The OPTP Goal 6 policies and strategies and SMS principles are scalable and effective across a broad range of organizations and applications. The goal of the OPTP and SMS is to ensure the agency has an inclusive and effective process to direct resources to optimally manage safety.

4.1.3 Employee Safety Reporting Program

As written throughout this Plan, SMART requires all employees to notify their supervisor of any hazard or safety condition they observe and deem to be a threat to staff, customers, or the general public. Each observation is considered credible unless through assessment and investigation it is found not to be a risk. Employees are encouraged to report unsafe conditions to their immediate supervisor but also may report directly to the CSO.

SMART ensures all employees protection from retaliation by superiors as a result of a safety observation or hazard identification.

4.1.4 Organizational Chart



4.2 Staffing

4.2.1 Transit Director/Accountable Executive

Dwight Brashear

The Transit Director plans, coordinates, directs, and supervises public transportation system operations and fleet maintenance. Responsibilities include long-range planning and goal-setting within the department; implementation of department strategies and Transit Master Plan; and recommending and implementing SMART policies. The Transit Director manages the budgetary aspects of the Transit department.

4.2.2 Transit Operations Manager/Chief Safety Officer (CSO)

Eric Loomis

The Transit Operations Manager leads daily operations of bus services. The Transit Operations Manager is designated as the CSO and ensures SMS oversight. All transit drivers, dispatchers, and supervisors report to this position. The Operations Manager is responsible for developing and implementing an ongoing training program. Other responsibilities include the development and implementation of new routes and services, maintaining departmental records, and administering approved projects.

4.2.3 Grants and Programs Manager

Elli Work

The Grants and Programs Manager is responsible for the daily activities associated with SMART's active transportation programs. The Grants and Programs Manager is responsible for ensuring the Transportation Demand Management (TDM) program is administered efficiently and effectively. Other responsibilities include developing and administering measurable programs to diverse target audiences, implementing public information campaigns, and submitting grants and statistical reporting. Grant administration includes oversight of Federal and State formula and discretionary funding.

4.2.4 Fleet Services Manager

Scott Simonton

The Fleet Services Manager leads and supervises the operation of the Fleet Services Division. The Fleet Services Division is responsible for the maintenance and repair of the city's inventory of vehicles and equipment, fuel management, and the acquisition and disposal of vehicles/equipment. The Fleet Services Manager schedules and coordinates the city's preventive maintenance program, maintains records and reports on equipment, and develops strategies related to the operation of the division's goals, personnel allocation, budget, and operations.

5. HAZARD IDENTIFICATION/RESOLUTION PROCESS

The Hazard Identification/Resolution Process is perhaps the heart of the PTASP.

5.1 Hazard Identification

The management of identified hazards is a vital component of the SMART PTASP. Accidents and incidents are prevented by proactively identifying hazards, assessing the associated risk, developing appropriate mitigating measures, and tracking implementation of the corrective action to closure. SMART identifies hazards via several different internal and external sources and categorizes each identified hazard accordingly to the severity and likelihood of the hazard.

The PTASP applies to all SMART employees and obligates everyone to be constantly vigilant for identifying hazards. It covers all aspects of SMART's facilities, systems,

equipment, vehicles, right-of-way, and work environments. SMART defines a hazard as a condition or set of conditions, internal or external to the system or system operation, which, when activated could cause injury or death or damage to or loss of equipment or property. An unacceptable hazard is a condition that may endanger human life or property or result in major system loss. This condition must be mitigated.

5.2 Hazard Management Process

The Hazard Management Process:

- Defines SMART's approach to hazard management and the implementation of an integrated system-wide hazard resolution process;
- Specifies the sources of and the mechanisms to support the ongoing identification of hazards;
- Defines the process by which identified hazards will be evaluated and prioritized for elimination or control; and
- Identifies the mechanism used to track and resolve the identified hazard(s).

5.3 Hazard Identification

Identification of hazards is the responsibility of all departments and individual employees; continuous management of hazards is the key to an effective PTASP. Hazards that are identified are analyzed by the CSO in collaboration with the Transit Director, Fleet Services Manager, and other city departments that the hazard might be relevant to for severity, frequency, and cost feasibility of remedial action required to eliminate, reduce, or control the hazard.

Hazards can be identified through a number of sources:

- System inspections, reviews, regulatory inspections, and observations
- Accidents and incidents investigations
- System reliability and failure reports
- City safety inspections
- Ride checks and proficiency checks
- Customer complaints
- Employee safety concerns or issues reported to management

5.4 Hazard Analysis

SMART uses two methods for orderly identification of hazards: inductive and deductive analysis.

The inductive hazard identification process consists of an analysis of system components to identify their respective failure modes and the effects they will have on the total system. This process assumes the failure of single elements or events and, through analysis, determines the potential consequential effects on the system or subsystem.

The deductive hazard identification process (post-accident/incident) involves defining an undesired effect (e.g., collision, fire) and then deducing the possible conditions or system component faults that are necessary to cause the undesired effect.

5.5 Hazard Categorization

Hazard severity is a subjective determination of the worst case that could be anticipated to result from human error, design inadequacies, component failure, or malfunction. The categories of hazards based on the MIL-STD-882-C are as follows:

Category 1, Catastrophic – operating conditions are such that human error, design deficiencies, element, subsystem or component failure, or procedural deficiencies may cause death or major system loss and require immediate termination of the unsafe activity or operation.

Category 2, Critical – operating conditions are such that human error, subsystem or component failure or procedural deficiencies may cause severe injury, severe occupational illness, or major system damage and require immediate corrective action.

Category 3, Marginal – operating conditions are such that they may result in minor injury, occupational illness, or system damage and are such that human error, subsystem, or component failures can be counteracted or controlled.

Category 4, Negligible – operating conditions are such that human error, subsystem or component failure, or procedural deficiencies will result in less than minor injury, occupational illness, or system damage. The categorization of hazards is consistent with risk-based criteria for severity; it reflects the principle that not all hazards pose an equal amount of risk to personal safety.

5.6 Hazard Probability

Hazard Probability is defined as the probability that a specific hazard will occur during the planned life expectancy of the system element, subsystem, or component. It can be described subjectively in potential occurrences per unit of time, events, population, items, or activity, ranked as follows:

A (Frequent)	Likely to occur frequently (individual); continuously experienced (fleet/inventory)
B (Probable)	Will occur several times in life of an item; will occur frequently in fleet/inventory
C (Occasional)	Likely to occur sometime in the life of an item; will occur several times in fleet/inventory
D (Remote)	Unlikely but possible to occur in life of an item; unlikely but can be expected to occur in fleet/inventory

E (Improbable)

So unlikely, it can be assumed occurrence may not be experienced; unlikely to occur, but possible in fleet

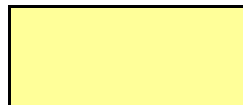
Frequency of Occurrence	Hazard Categories			
	Catastrophic 1	Critical 2	Marginal 3	Negligible 4
A - Frequent	1A	2A	3A	4A
B - Probable	1B	2B	3B	4B
C - Occasional	1C	2C	3C	4C
D - Remote	1D	2D	3D	4D
E - Improbable	1E	2E	3E	4E

1A, 1B, 1C, 2A, 2B
3A



Unacceptable

1D, 2C, 2D, 3B, 3C



Undesirable with management decision required

1E, 2E, 3D, 3E, 4A,
4B



Acceptable with review by management

4C, 4D, 4E



Acceptable without review

Unacceptable: The hazard must be mitigated in the most expedient manner possible before normal service may resume. Interim corrective action may be required to mitigate the hazard to an acceptable level while the permanent resolution is in development.

Undesirable with management decision required: A hazard at this level of risk must be mitigated by the Transit Director.

Acceptable with review by management: The CSO must determine if the hazard is adequately controlled or mitigated as is and report his/her assessment to the Transit Director.

Acceptable without review: The hazard will be reviewed by the CSO but does not require further mitigation or control.

The Risk Assessment Process is used to prioritize hazardous conditions and focus available resources on the most serious hazards requiring resolution.

5.7 Hazard Resolution

Resolution of hazards will utilize the results of the risk assessment process. The objectives of the hazard resolution process are to:

1. Identify areas where hazard resolution requires a change in the system design, installation of safety devices, or development of special procedures;
2. Verify that hazards involving interfaces between two or more systems have been resolved; and
3. Verify that the resolution of a hazard in one system does not create a new hazard in another system.

SMART will use the following methodologies to assure that PTASP objectives are implemented throughout design, construction, and procurement; and operations and hazards are eliminated or controlled:

1. Design out or design to minimize hazard severity. To the extent permitted by cost and practicality, identified hazards will be eliminated or controlled by the design of equipment, systems, and facilities.
2. Hazards that cannot reasonably be eliminated or controlled through design will be controlled to the extent practicable to an acceptable level through the use of fixed, automatic, or other protective safety design features or devices. Provision will be made for periodic functional checks of safety devices and training for employees to ensure that PTASP objectives are met.
3. When design and safety devices cannot reasonably nor effectively eliminate or control an identified hazard, safety warning devices will be used (to the extent practicable) to alert persons to the hazard.
4. Where it is impossible to reasonably eliminate or adequately control a hazard through design or the use of safety and warning devices, procedures and training will be used to control the hazard. Precautionary notation will be standardized and safety-critical issues will require training and certification of personnel.

5.8 Hazard Resolution Management and Tracking

Resolution of identified hazards will be monitored and managed by the CSO, in collaboration with the responsible department, and approved by the Transit Director. The Operational Hazard Reporting Form and Hazard Tracking Matrix will be used for tracking identified hazards and the hazard resolution process. See Appendix A and B. This process allows the CSO to follow-up on mitigation strategies to determine if an alternative strategy would be more effective.

6. SAFETY ASSURANCE: ACCIDENT/INCIDENT REPORTING & INVESTIGATION

SMART has a training program to promote safety and, to the extent possible, avoid accidents and incidents. In the event of an accident or incident, SMART has policies and procedures in place to handle any situation effectively and efficiently.

6.1 Procedures

Immediately following an accident/incident the situation is to be reported to the appropriate immediate supervisor. All accidents and incidents are investigated. The degree of formality during the process of accident/incident investigation is directly dependent upon its severity in accordance with the Operations Policies and Procedures Manual. Supervisors investigate all bus accidents and will conduct and record them according to the procedures.

Basic information about the reportable accident/incident must be transmitted verbally and/or via email to the Transit Operations Manager. If necessary, everyone involved in the incident/accident will complete the proper post-accident/incident forms to be submitted to the Accident Review Board and other entities. If required, the Accident Review Board will receive all pertinent information from the accident and determine type of accident (preventable/non-preventable), conduct a root cause analysis and recommend retraining exercises.

7. FACILITIES INSPECTIONS (Includes Systems Equipment & Rolling Stock)

Safety Inspections of SMART facilities occur quarterly by the City's Safety Committee using a safety checklist to detect and correct unsafe conditions and deteriorating equipment conditions to ensure the safety for employees, public safety, and to ensure compliance with regulations.

Buses are inspected on a daily basis by operators to identify defective safety equipment. Bus operators perform pre-trip and post-trip inspections and submit forms to report defective safety equipment at the conclusion of their shifts and buses are not returned to service until such items are repaired.

Transit facilities are inspected regularly by City Public Works Department in compliance with FTA guidelines.

Bus stops are inspected regularly by Fleet Services to ensure equipment condition, accessibility for pedestrians, and cleanliness.

8. MAINTENANCE REVIEWS/INSPECTIONS (All Systems & Facilities)

Section 1 describes the major equipment and facilities of the system along with the department responsible for performing facility and equipment maintenance. Each responsible department maintains its maintenance and inspection manuals for each facility and all equipment. Preventive Maintenance Inspections (PMs) for vehicles are performed in accordance with manufacturer requirements by Fleet Services. Checklists are used to perform the PMs to ensure thorough and consistent inspections.

8.1 Resolution of Review/Inspection Findings

Serious hazardous conditions that are identified during the above inspections are immediately corrected and the conditions are documented in accordance with the SMARTs' procedures and practices. In the event a hazard cannot be immediately corrected, it shall be reported to the CSO and is managed and resolved in accordance with Section 5.2, Hazard Management Process. The CSO then tracks the resolution to closure including evaluating effectiveness of mitigation strategy.

9. RULES/PROCEDURES REVIEW

Standard operating procedures and safety rules, which are incorporated into the SMART Operations Employee Manual and Operations Policies and Procedures Manual, provide for safe operations of SMART vehicles off and on SMART property. SMART's policies and procedures establish processes for development, revision, maintenance, management, and enforcement of SMART's operations. The Transit Supervisors review this process to ensure consistency and the integrity of the policies and procedures modification process. These revisions are made on an as-needed basis and reviewed annually. The Operations Manager is charged with ensuring policies and procedures are developed, written, communicated, and consistently followed. SMART's Operations Policies and Procedures Manual is reviewed annually and revised as necessary. Procedures can be implemented with review of the Transit Operations Manager and/or the Transit Director.

9.1 Process for Ensuring Rules Compliance

Operators are tested on their knowledge of the Operations Employee Manual and Operations Policies and Procedures Manual during initial training and annual trainings.

- Policy/Procedure Prioritization – evaluate which activities pose greatest risk of injury, service disruption, or customer dissatisfaction.
- Roles and Responsibilities – identify who shall be responsible for each specific situation.

Safety training is completed by new employees and annually for all employees. All employee training includes classroom and field certification.

Supervisors are required to ensure that employees perform their assigned duties in compliance with all policies and procedures. Tailored training is assigned to employees who

are not in compliance with policies and procedures. Disciplinary procedures consistent with union contracts may be used to enforce compliance with established rules and procedures.

Documentation is required from management to maintain accurate compliance records. Records shall be kept both on observations and on action taken to correct observed deficiencies.

10. SAFETY PROMOTION: TRAINING AND CERTIFICATION REVIEW

Instruction in safe methods of operation and safety procedures is included in manuals, handbooks, and other documentation developed for the training and certification of operations and maintenance personnel. Training systems have been developed by each department, which include in-house classroom training, on-the-job training, and testing. Each department is responsible for establishing safety training requirements specific to personnel job descriptions and tasks. The City maintains central records of safety training for all employees. Management reviews training records annually to ensure that the required trainings and certifications are being completed by employees and are up-to-date.

10.1 New Employee Orientation

All new employees and all employees who receive a promotion must attend mandatory safety training (depending on job assignment) including: City Handbook, Operations Employee Manual, Operations Policies and Procedures Manual, Bloodborne Pathogens training, and other department-specific hazard and safety trainings. All employees receive PTASP training, which includes hazard management and basic hazard communication.

10.2 Hazardous Materials/Hazard Communication Training

All maintenance and support personnel who are required to use chemicals and hazardous or toxic substances are trained in the safe use of such substances. Employees who move to new positions are provided training in the use of any new chemicals that they may be assigned to use by the Fleet Manager.

10.4 Safety Related Operations and Maintenance Training

All new bus operators are provided training, which includes traffic regulations, rules, procedures, and field training. Bus operators must obtain a commercial driver license (CDL). Supervisors perform ride-checks to assess knowledge of bus operations, regulations, procedures, and pre-trip inspections. Operations employees attend a quarterly safety meeting to review and train on focused safety topics.

Fleet employees are required to attend a monthly safety training to review industry best practices. This interactive training uses video and other training materials to test an employee's knowledge of that month's safety topic.

10.5 Safety Rules and Procedures Training

Employees are trained to perform in accordance with the safety rules and procedures applicable to their department. The rules and procedures for each department are established by the appropriate manager and coordinated with the CSO. Violations of rules, regulations, and/or procedures may result in disciplinary action (coaching, retraining, reprimands, suspensions, or dismissal) in accordance with the rule books, policies, and the union contract.

10.6 Emergency Preparedness Training

Employees are provided training in: System Security, SOPs regarding hazardous materials, bomb threats and unknown substance response incidents, and emergency preparedness for employees as part of New Employee Orientation, technical training, and ongoing training programs.

11. EMERGENCY MANAGEMENT

11.1 Responsibilities for Emergency Management

SMART focuses on the preparedness, response, recovery, and mitigation of incidents and safety events that impact SMART transit operations. Effective emergency management minimizes impacts to transit operations.

Emergency preparedness comes in many forms: providing transit fire/life safety and emergency management training to SMART employees, revising emergency plans, ensuring policies and procedures work in concert with emergency management practices, frequent public outreach, presentations to SMART employees, equipment testing and maintenance, and community involvement.

11.2 Emergency Plans and Procedures

City management is responsible for the development and management of emergency plans that are included in policies and procedures and given out during new employee training.

Bus emergencies, which endanger life, health, property, or revenue service, require response in accordance with SMART policy. Modifications to existing policies and procedures, or new policies and procedures can be developed, distributed for review, requesting concurrence and approval from all parties involved. The new or modified policy or procedure is incorporated into the SMART Operations Policies and Procedures Manual or Employee Handbook and given to all employees.

12. SYSTEM MODIFICATION REVIEW/APPROVAL PROCESS

Safety assurance of new systems, equipment, and vehicles begins with the basic design and in the development of specifications to ensure that safety requirements and standards are incorporated. Consideration is given to such items as system interfaces, human factors,

environmental conditions, isolation of energy sources, materials compatibility, use and long-term storage of critical materials, emergency response capability, including emergency egress and rescue paths, fire sources and measures for protection, equipment layout, lighting requirements, and maintenance requirements. The individual(s) responsible for reviewing the system modification depends on the type of new system or equipment being implemented and could consist of, but is not limited to: Transit Operations Manager, Fleet Services Manager, Transit Director, Community Development Department, and contractors. The Transit Director will be a part of the final approval process with those involved in the system modification.

13. SAFETY DATA ACQUISITION/ANALYSIS

The following are sources of data that SMART utilizes to collect data and identify hazards for entry into the Hazard Management Process:

- Reports and observations from operators and other field personnel
- Information, experiences, and ideas from operators, maintenance, and management
- Observations of facilities and operations hazards by administrative personnel
- Results from emergency response to accidents and incidents
- Formal hazard analyses using the inductive process
- Inspections of facilities and equipment to identify and document safety, environmental, and industrial hygiene hazards on a proactive basis
- The Fleet Services Manager oversees preventive maintenance and performs periodic inspections and reviews in accordance with established procedures described in Section 8
- Safety-related comments received by dispatchers and supervisors from the customers and the general public are forwarded to the CSO for evaluation and follow-up action
- The CSO generally develops the required reports to provide safety management information to the rest of the department

13.1 Access to Data - Reports Prepared by CSO or City Safety Committee

The City and/or SMART produces and distributes the following reports to communicate safety information to all levels of the organization:

Internally-Distributed Reports

- Bus Accidents
- Reports of employee injuries
- Safety Performance Reports
- Hazard Management Log

14. INTERDEPARTMENTAL/INTERAGENCY COORDINATION

All safety-sensitive issues that pertain to operators are reported to transit supervisors. Transit supervisors will assess the severity of each issue and determine what actions to

follow. When appropriate, transit supervisors will communicate with the Transit Operations Manager/CSO, Transit Director, Human Resources Manager, and other departments and agencies associated with the situation.

All safety-sensitive issues that pertain to maintenance are reported to the Fleet Services Manager, who will communicate with the appropriate departments and agencies as needed.

SMART will keep an ongoing close relationship with City of Wilsonville Police Department and Clackamas County Sheriff's Department understanding that safety is a priority at SMART and that coordination of the departments creates a safer community with quicker response time. SMART periodically involves the Police Department and Fire District at All Staff meetings to train employees in safety and security awareness.

15. HAZARDOUS MATERIALS PROGRAMS

SMART is responsible for developing procedures that ensure compliance with the standards by all SMART employees. The chemical, hazardous material, and Safety Data Sheet (SDS) review process is incorporated into the SMART's training manuals for relevant employees. Access to the approved SDS is available in Fleet Services.

16. DRUG AND ALCOHOL ABUSE PROGRAMS

The SMART Human Resources department is responsible for administering a Substance Abuse Testing Program in accordance with 49 CFR Part 40 and 49 CFR Part 655. The Human Resources department monitors the program and ensures that employees in safety-sensitive positions who are returning to work from the Employee Assistance Program (EAP) have been medically certified to do so. The major goal of the Substance Abuse Policy is to ensure a safe operating environment for the public and employees. A major purpose of the EAP is to refer employees to the appropriate medical and/or rehabilitation treatment and counseling. The objective is to help them resolve their substance abuse problems and return to their full productive job capacity.

17. CONTRACTOR SAFETY COORDINATION

All contractors who perform work on, or interface with the operating systems are required by contract to ensure that supervisors and assigned employees attend safety training.

Each contract also requires compliance with applicable Federal and State OSHA regulations. Contractors must submit to the City of Wilsonville and/or SMART required safety training certifications and documentation of course completion that are pertinent to the work to be performed under the contract. The City of Wilsonville reviews the certifications and documentation for validity and to ensure currency of the training.

18. ALTERNATIVE FUELS & SAFETY

SMART's fleet operates on diesel, gasoline, compressed natural gas (CNG), and electricity. The fleet is composed of the following fuel types: Diesel, 21.25%; compressed natural gas (CNG) 21.25%; Clean Diesel 12.5%; Diesel Hybrid, 6%; Battery Electric 6%; and gasoline 33%.

SMART will maintain and conduct safety training for relevant employees in regards to the use and maintenance of all vehicles and facilities for the different fuel types.

19. OPERATING ENVIRONMENT AND PASSENGER FACILITY MANAGEMENT

SMART strives to provide convenient, safe, and reliable transportation services to its customers. Operators only let passenger alight at dedicated stop locations in normal driving situations.

Fleet Services and Public Works are in charge of maintaining bus stops and passenger facilities owned by SMART.

19.1 Current Bus Stops

Each stop is assessed for needed amenities and accessibility. Stops that lack street lighting will be prioritized for receiving lighting. Stops that do not meet ADA requirements, such as proper curb cuts, will be prioritized to become compliant. At high passenger volume stops, shelters and benches are considered if they are currently lacking and are prioritized based on need.

19.2 Future Bus Stops

Elements that are considered prior to locating future bus stops include:

- On-street vs. dedicated stop locations
- Transferability between other bus routes and other modes of transportation
- Passenger security
- Type of amenities (seating, design, lighting, etc.)
- Information kiosks, poles, signs, etc.
- Standards for improvements and upgrades at stops
- ADA related items (curb cuts, access)
- Routine maintenance (graffiti removal, cleaning)
- Curbing (trash removal, storm water drainage)
- Area lighting
- Traffic engineering/ergonomics for bus stop placement
- On-site security provisions

20. SECURITY

SMART has incorporated security into the design of its facilities. Cameras are used for surveillance in some areas. Fleet Services and the SMART management offices are attached to the yard where buses are parked and maintained. The yard is enclosed with chain link fence and is only entered using a key FOB or through the SMART offices.

Employees are trained to understand their role in security, which is outlined in the Transit Operator Handbook. All employees are trained on how to identify hazards and what steps to take for a given situation. Training sessions are continually conducted to help refresh employees on system security and how to minimize threats and vulnerabilities.

21. INTERNAL SAFETY REVIEW PROCESS

The CSO, in collaboration with the management team, is responsible for monitoring the effectiveness of the implementation of the PTASP.

21.1 Scope of Activities

All SMART safety activities and programs are subject to planned, periodic, and regularly scheduled safety review throughout the life of each system. The safety and security review procedures and checklists evaluate the effectiveness of the implementation of requirements of the PTASP.

SMART will perform comprehensive and continuous internal safety review of its operations at least once every three years. Over a three-year period, all requirements of the PTASP must be reviewed at least once. The three-year schedule shall be reviewed and updated as necessary annually by the first of October. A copy of the schedule shall be given to each department for review.

Safety reviews will be scheduled by the CSO and conducted by the department manager.

Each internal safety review will be conducted in accordance with a set of safety review checklists prepared by the department manager before the safety review is begun. The checklists will also be developed in accordance with the PTASP and this procedure.

21.2 Safety Review Reporting

The department managers will provide the safety review checklists and any additional reports to the CSO and the Transit Director.

The internal safety review process is intended to be complete and comprehensive. The CSO is responsible for ensuring that all requirements of the PTASP are reviewed in each three-year cycle and each element is comprehensively evaluated.

In addition to SMART's approved PTASP, the department managers shall use Standard Operating Procedures (SOPs), other pertinent documents, and the principles of system safety and security as a basis for preparing a set of safety checklists before beginning the on-site review. Some typical examples of these procedures and other pertinent documents reviewed during the safety reviews include:

- System operating rule book (SMART Operations Employee Manual and Operations Policies and Procedures Manual);
- Training curricula and materials;
- System design criteria and project engineering procedures for extensions and modifications;
- Records and documentation of safety related events, tasks, processes, procedures, activities and policies;
- Previous internal and external safety and security review reports;
- Corrective action plans; and
- All other documentation needed to verify safety-related activities, programs and policies.

Appendix A

Operational Hazard Analysis (OHA)

OPERATING HAZARD ANALYSIS						
System:		Prepared by:			Date:	
Subsystem:		Reviewed by:			Date:	
OHA No:		Approved by:			Date:	
General Description		Hazard Cause/Effect		Hazard Assessment Matrix	Corrective Action	
Task Description	Hazard Description	Potential Cause	Effect on Personnel/Subsystem/System		Possible Controlling Measures and Remarks	Resolution



**CITY COUNCIL MEETING
STAFF REPORT**

<p>Meeting Date: June 15, 2020</p>	<p>Subject: Resolution No. 2824 Collective Bargaining Agreement between the City of Wilsonville and Service Employees International Union Local 503, OPEU (SEIU) July 1, 2020-June 30, 2021</p> <p>Staff Member: Jeanna Troha, Assistant City Manager and Andrea Villagrana, Human Resources Manager</p> <p>Department: Human Resources</p>	
<p>Action Required</p> <p><input checked="" type="checkbox"/> Motion <input type="checkbox"/> Public Hearing Date: <input type="checkbox"/> Ordinance 1st Reading Date: <input type="checkbox"/> Ordinance 2nd Reading Date: <input checked="" type="checkbox"/> Resolution <input type="checkbox"/> Information or Direction <input type="checkbox"/> Information Only <input type="checkbox"/> Council Direction <input type="checkbox"/> Consent Agenda</p>	<p>Advisory Board/Commission Recommendation</p> <p><input type="checkbox"/> Approval <input type="checkbox"/> Denial <input type="checkbox"/> None Forwarded <input checked="" type="checkbox"/> Not Applicable</p> <p>Comments: N/A</p>	
<p>Staff Recommendation: Staff recommends that Council adopt Resolution No. 2824.</p>		
<p>Recommended Language for Motion: I move to approve Resolution No. 2824.</p>		
<p>Project / Issue Relates To:</p>		
<p><input type="checkbox"/> Council Goals/Priorities</p>	<p><input type="checkbox"/> Adopted Master Plan(s)</p>	<p><input checked="" type="checkbox"/> Not Applicable</p>

ISSUE BEFORE COUNCIL:

Oregon Statute requires the governing body approve Collective Bargaining Agreements between the Employer and labor unions. The issue before the City Council is consideration of the proposed Collective Bargaining Agreement between the City of Wilsonville and SEIU Local 503, OPEU for July 1, 2020 through June 30, 2021.

EXECUTIVE SUMMARY:

The current SEIU Collective Bargaining Agreement expires June 30, 2020. The parties initiated bargaining in January but paused the process during the City’s initial response to the coronavirus pandemic. Bargaining resumed in May and the bargaining teams worked cooperatively to address changes in contract language and compensation. The language changes are mostly due to state or federal legislation. The only compensation change is a wage increase of 1.5% effective July 1, 2020.

Attached is the redline version of the Collective Bargaining Agreement.

EXPECTED RESULTS:

N/A

TIMELINE:

N/A

CURRENT YEAR BUDGET IMPACTS:

Funds were not budgeted in personnel services in the FY 2020-2021 Budget, but held in contingency because negotiations were underway during the budget process and economic impacts were unknown. With negotiation complete, the finance department will prepare a budget adjustment to be approved by the City Council.

FINANCIAL REVIEW / COMMENTS:

Reviewed by: CAR Date: 6/10/2020

A supplemental budget adjustment will be presented to Council in July to increase the personal services line items for each operating program.

LEGAL REVIEW / COMMENT:

Reviewed by: ARGH Date: 6/10/2020

COMMUNITY INVOLVEMENT PROCESS:

N/A

POTENTIAL IMPACTS or BENEFIT TO THE COMMUNITY:

N/A

ALTERNATIVES:

N/A

CITY MANAGER COMMENT:

N/A

ATTACHMENTS:

1. Resolution No. 2824
 - A. Collective Bargaining Agreement between the City of Wilsonville and SEIU Local 503, OPEU

RESOLUTION NO. 2824

A RESOLUTION ADOPTING THE LETTER OF AGREEMENT BETWEEN THE CITY OF WILSONVILLE AND SEIU LOCAL 503, OPEU.

WHEREAS, the City of Wilsonville and SEIU Local 503, OPEU have negotiated a one year Collective Bargaining Agreement effective July 1, 2020 through June 30, 2021.

NOW, THEREFORE, THE CITY OF WILSONVILLE RESOLVES AS FOLLOWS:

1. The City Manager is authorized on behalf of the City to execute the negotiated and ratified the Collective Bargaining Agreement with SEIU Local 503, OPEU attached here as Exhibit A as if fully set forth herein.

ADOPTED by the City Council of the City of Wilsonville at a regular meeting thereof this 15th day of June, 2020, and filed with the Wilsonville City Recorder this date.

Tim Knapp, Mayor

ATTEST:

Kimberly Veliz, City Recorder

SUMMARY OF VOTES:

Mayor Knapp

Councilor Akervall

Councilor Lehan

Councilor West

Councilor Linville

Exhibit:

- A. Collective Bargaining Agreement between the City of Wilsonville and SEIU Local 503, OPEU

FULLY RECOMMENDED TENTATIVE AGREEMENT 05-06-2020



Collective Bargaining Agreement

**Between
City of Wilsonville
and
SEIU Local 503, OPEU**

Effective July 1, ~~2020~~ through June 30, ~~2021~~

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FULLY RECOMMENDED TENTATIVE AGREEMENT 05-06-2020

PREAMBLE

This Agreement is entered into between the City of Wilsonville, hereinafter referred to as the "City", and the Service Employees International Union Local 503, Oregon Public Employees Union, hereinafter referred to as the "Union".

ARTICLE 1 – RECOGNITION

1.1 Union Recognition. The City recognizes the Union as the sole and exclusive collective bargaining representative of all employees covered by this collective bargaining agreement.

1.2 Covered Employees.

Transit Unit. Transit employees as defined in ORS 243.738, Transit Drivers, Mechanics, Transit Dispatchers, and Fleet Hostlers of the City of Wilsonville, excluding supervisory and confidential employees as defined by ORS 243.650(6) and (23), interns and/or students. This unit shall be subject to the collective bargaining dispute resolution process accorded to non-strikeable units according to Oregon law.

Fleet is considered a division of the Transit Department.

1.3 Employee Descriptions.

Regular Full-Time employees shall be defined as employees who are regularly scheduled to work forty (40) hours a week, and are part of the bargaining unit.

Regular Part-Time employees shall be defined as employees who are regularly scheduled to work twenty (20) or more hours per week. Employees working less than twenty 20 hours per week are not part of the bargaining unit.

Extra Board transit drivers on the extra board will be guaranteed twenty-five (25) hours pay per week. To receive the guarantee, employees must be available for assignment and accept said assignment unless they call in sick in the morning and have available sick leave time in their accrual bank. In this event, the employee will receive compensation for all hours worked plus the requested sick leave hours for a total of at least twenty-five (25) hours for the week. Hours worked beyond the twenty-five (25) hours are paid at the applicable straight time rate. These employees are considered regular part-time employees who do not have regularly scheduled work hours, and are part of the bargaining unit.

On Call Transit Driver: Transit drivers who work intermittently are not part of the bargaining unit.

Seasonal or Temporary employees shall be defined as employees who are hired to work for

FULLY RECOMMENDED TENTATIVE AGREEMENT 05-06-2020

1040 hours or less during a calendar year and are part of the bargaining unit. Seasonal or temporary employees are not eligible for any employee benefits or accrual of employee benefits, including but not limited to holidays, insurance, retirement, or paid leaves. Notwithstanding the above, a seasonal or temporary employee who is required to work on a recognized holiday will be compensated time and one-half for all hours worked on the holiday.

The calculation of the allowable 1040 hours shall begin when the employee is first hired. For example, if an employee is hired March 1, 2010 and works 1040 hours by September 1, 2010, he/she will not be eligible for rehire as a seasonal or temporary until January 1, 2011.

The parties understand that if a seasonal or temporary employee works in excess of 1040 hours, the employee shall then be considered a regular status employee but would still be subject to the regular probationary period.

1.4 New Classifications. Whenever the City develops a new classification, they shall develop a job description for the position and assign a wage rate. Once this procedure is completed, the City shall notify the Union in writing. In the event the Union does not agree with the assigned wage rate, the Union shall notify the City within fourteen (14) days and the parties shall negotiate over the wage rate under ORS 243.698. The City shall not be precluded from filling the position during negotiations.

ARTICLE 2 – NON-DISCRIMINATION

There shall be no discrimination by the City against any employee because of age, race, marital status, mental or physical disability, national origin, sex, religion, or any other protected class, in accordance with applicable law. Neither will the Employer discriminate based on gender identity or sexual orientation. The provisions of this Agreement shall be applied without discrimination to all employees.

ARTICLE 3 – MANAGEMENT RIGHTS

Except as expressly modified or restricted by a specific provision of this Agreement, all charter, statutory and other managerial rights, prerogatives, and functions are retained and vested exclusively in the City, including, by way of description and not limitation, the rights, in accordance with its sole and exclusive judgment and discretion: to direct and supervise all operations and functions; to manage and direct the work force, including, by way of description and not limitation, the right to determine the methods, processes, locations and manner of performing work; to hire, promote, and retain employees; to determine schedules of work; to purchase, dispose of and assign equipment and supplies; to determine the need for a reduction or an increase in the work force; to establish, revise and implement standards for hiring, classification, promotion, quality of work, safety, materials and equipment; to implement new and to revise or discard, wholly or in part, methods, procedures, materials, equipment, facilities and standards, and to sub-contract or contract projects or works it deems appropriate. Utilization of any management rights not specifically limited by this Agreement shall be at the City's discretion, provided any

FULLY RECOMMENDED TENTATIVE AGREEMENT 05-06-2020

bargaining obligation arising from ORS 243.650-672 and the Status of Agreement article (Article 23) contained herein is satisfied. The City's failure to exercise any right, prerogative, or function hereby reserved to it, or the City's exercise of any such right, prerogative, or function in a particular way, shall not be considered a waiver of the City's right to exercise such right, prerogative, or function or preclude it from exercising the same in some other way not in conflict with the express provisions of this Agreement.

ARTICLE 4 – UNION SECURITY

4.1 Check-off. The City agrees to deduct the uniformly required Union membership dues and other authorized fees, contributions or assessments ~~once each month~~ from an employee's pay, upon written, electronic, or recorded oral request of the employee to the Union, and remit those deductions to the Union. All applications or cancellations of membership shall be submitted by the employee to the Union. Any written applications for Union membership and/or authorizations for union dues and/or other deductions or dues cancellations which the City receives shall be promptly forwarded to the Union. The Union will maintain the written, electronic, and recorded oral authorization records and will provide copies to the employer upon request. Any written, electronic, or recorded oral dues deduction authorizations submitted that contain the following provision will cease only upon compliance by the employee with the stated conditions as follows:

This authorization is irrevocable for a period of one year from the date of execution and from year to year thereafter unless not less than thirty (30) and not more than forty-five (45) days prior to the end of the annual period or the termination of the contract between my employer and the Union, whichever occurs first, I notify the Union and my employer in writing, with my valid signature, of my desire to revoke this authorization.

~~**4.2 Fair Share.** Fair share shall be deducted from the wages of non-member employees in accordance with ORS 243.666(1) and 243.672(1)(c). Fair share deductions shall be made for the month in which the employee was hired. The aggregate deductions of all fair share payers shall be remitted together with an "itemized reconciliation" to the Union no later than the fifth (5th) working day of the month following the month for which the fair share deductions were made.~~

~~**4.3 Religious Objection.** Bargaining unit members who exercise their right of non-association only when based on a bona fide religious tenet or teaching of a church or religious body of which such employee is a member shall pay an amount of money equivalent to regular monthly Union dues to a non-religious charity or to another charitable organization mutually agreed upon by the employee and the Union. Such payment shall be remitted to that charity by the employee and this fact certified by the employee to the City within fifteen (15) calendar days of the time dues or fair share payment would have been taken out of the employee's paycheck. The City shall, within fifteen (15) calendar days of its receipt, send a copy of such certification to the Union. If an employee fails to provide certification to the City by the fifteenth (15th) day, the City shall resume dues or fair share deductions until such notice is provided.~~

FULLY RECOMMENDED TENTATIVE AGREEMENT 05-06-2020

4.24 Electronic Membership Data. The City will furnish the Union, on a monthly basis, using an electronic medium, the following information for each bargaining unit employee: name; employee identification number; home address; home phone number; work email; work phone number; cell phone number; fair share/member status; amount of dues withheld; classification; work location; base pay rate; hire date; and full-time/part-time status, if the City has this information in its records.

4.3 Notice of New Hires. Within ten (10) days of the date of hire within the bargaining unit, the City shall provide the information listed in 4.2, if the City has the information in its records.

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4.45 Indemnification. The Union agrees to indemnify and hold harmless the City, its Council members, agents, as provided under law. and employees from and against any and all claims, demands, actions, lawsuits or any other forms of liability, monetary (including any reasonable attorneys' fees and costs) or otherwise (for example, claims for reinstatement or reemployment) arising from the application and enforcement of Article 4.

ARTICLE 5 – UNION BUSINESS

5.1 Representatives. The Union will notify the City, in writing, of the names of its representatives within thirty (30) days of any changes.

5.2 Access. Representatives of the Union shall have reasonable access to the City's facilities to visit employees when necessary during working hours. Notice of such visits to non-public areas shall be given to the department head and the visits shall be conducted in a way that minimizes any work disruption.

A Union steward shall be granted reasonable time off without loss of pay and access to employee work locations during working hours to investigate and process grievances through the arbitration step and as otherwise required by ORS 243.798.

5.3 Union Leave. Subject to reasonable operational requirements of the City, official Union delegates and members of the Union Board of Directors shall be allowed to use accumulated leave time (other than sick leave) or leave of absence without pay at their request to attend the Union's biennial semi-annual General Council.

The City shall reasonably grant unpaid release time, defined as a leave of absence from the employee's regular public employment to conduct labor organization business, as required by ORS 243.802. Requests for and approval of release time shall be governed by Article 17.

5.4 Bulletin Board. Bulletin board space in each building of the City shall be provided to the Union for the posting of meeting notices and other information directly related to the union affairs of the employees covered by this contract.

5.5 Collective Bargaining Activities. The City will allow up to three (3) employees off, without loss of pay, for the purpose of collective bargaining. Two (2) employees from operations and one (1) employee from Fleet.

FULLY RECOMMENDED TENTATIVE AGREEMENT 05-06-2020

5.6 Use of the City Email.

The parties recognize that the City email system, and all portions thereof, is at all times the sole property of the City. This resource is provided or assigned to employees to facilitate the orderly and efficient conduct of the public's business. In general, all such communications are subject to disclosure. The City will not assert any exceptions or exemptions from disclosure as to public records that happen to contain messages relating to Union activity by City employees. The parties recognize that the City may review all City emails in the City system at any time.

Employees elected/appointed to official positions and/or representatives may use the City's email system to conduct Union business, defined as: for the limited purposes of:

- 1) Collective bargaining, including the administration of collective bargaining agreements;
- 1) _____
- 2) The investigation of grievances or other disputes relating to employment relations; and
- 2) _____
- 3) Matters involving the governance or business of the labor organization, which includes:
 - A. Notifying Union members of meetings and scheduling meetings (date, time, place, and agenda);
 - B. Scheduling meetings among Union officers and/or representatives (date, time, place, and agenda); and
 - C. Filing official correspondence with the City (e.g., grievance documents).

Such email communications may only be prepared and sent during non-work time, which is limited to before and after work, and during meal and rest periods.

Misuse of the City email system will be subject to the disciplinary process.

5.7 New Employee Presentation. A Union representative shall have the right to meet with new employees within thirty (30) days of their date of hire for a minimum of thirty (30) minutes and maximum of one hundred and twenty (120) minutes without loss of pay for either the Union Representative or the new employee. A Union representative shall have the right to conduct the meetings at a City facility. The representative shall work with the City to choose the meeting time and place, so that the meetings do not interfere with the City's operations.

ARTICLE 6 – HOURS OF WORK

6.1 Workweek. Except as provided in Section 6.3, the workweek shall begin on Sunday at 12:01 A.M. and end at midnight the following Saturday.

FULLY RECOMMENDED TENTATIVE AGREEMENT 05-06-2020

6.2 Transit Driver Work Hour Limitations No employee shall be required or allowed to drive without a minimum of eight (8) consecutive hours off duty between shifts.

6.3 Regular Work Schedule. The regular schedule for regular full-time employees shall consist of five (5) consecutive eight (8) hour days in a workweek with two (2) consecutive days off between regular work weeks.

Based on specific bona fide operational needs, the City may assign a work schedule that has a break in consecutive hours or days. If an assignment to a non-consecutive work schedule becomes necessary, the affected employee(s) shall meet with their supervisor and may suggest alternatives. Once the work schedule change is made, employees will be given an opportunity to bid for the schedule based on their seniority. The parties have adopted this provision for the purpose of encouraging full-time employment while accommodating the operational needs of the City. However, this Section is not intended to create any obligation of the City to guarantee any level of work hours or days.

6.4 Flexible Work Schedule. A flexible work schedule is a schedule which varies from an eight (8) hour work day and/or varies in consecutive days worked. An employee may apply in writing for authorization to work a flexible work schedule, for example, four/ten (4/10) hour days.

As long as the schedule meets the operational and service needs of the City, no employee will be denied a flexible work schedule. Flexible work schedules may be modified, revised, and/or eliminated consistent with Section 6.4 below.

In the event the City grants a flexible work schedule, the City reserves the right to modify the workweek.

6.5 Work Schedules. Regular employees shall be notified of their work schedule, including the employee's workdays and hours. Work schedule changes shall be provided to the employee ten (10) work days in advance. If a ten (10) day notice is not given, the employee shall be compensated at the overtime rate for all hours worked outside the regular schedule until the notice requirement is met.

Notwithstanding the above, the ten (10) day notice is not required in the following circumstances:

- A. In the case of an emergency and for the duration thereof;
- B. Mutual agreement between the City and the employee; or
- C. Additional or substituted hours assigned to part-time employees.

An emergency shall be defined as a situation beyond the City's control that requires a schedule change to meet operational needs, e.g., impact of inclement weather, natural disasters, illness or injury. Emergency work schedule changes will be discussed with the Union upon request, but such discussions are not a precondition to implementing the changes.

Employees may exchange days, shifts, or hours of work with supervisor approval provided such change does not result in the payment of overtime or presents a disruption to the normal routine of

FULLY RECOMMENDED TENTATIVE AGREEMENT 05-06-2020

duties. Such exchanges shall not be considered as schedule changes necessitating the ten (10) day notice.

6.6 Rest and Meal Periods. All employees working more than six (6) consecutive hours in any workday shall receive at least a one-half (1/2) hour unpaid lunch break and a fifteen (15) minute paid break during each four (4) consecutive hour work period. Part-time employees working at least four (4) hours in a workday shall receive a ten (10) minute paid break period.

All **full-time transit drivers** will be entitled to either one (1) fifteen (15) minute paid break or two (2) ten (10) minute paid breaks each half shift depending on operational necessity.

Modification of State Law. The provisions of this Section regarding appropriate meal periods and rest periods are intended to modify state law concerning meal periods and rest periods as allowed under OAR 839-020-0050.

6.7 Work Hours Generally. The purpose of this Article is to provide general guidelines for work hours and schedule changes.

ARTICLE 7 - OVERTIME

7.1 Waiver. The City and the Union agree to waive application of ORS 653.268 and shall utilize the following provisions in determining compensation for overtime.

7.2 Definition. Except for those employees working a flexible schedule identified in Article 6, Hours of Work, above, overtime shall be compensated for time worked in excess of eight (8) hours in any one day or forty (40) hours per workweek at a rate of one and one-half (1-1/2) times the employee's regular rate of pay. For the purposes of calculating overtime, paid leaves do not count as hours worked.

For those employees working a flexible schedule, overtime shall be compensated for time worked in excess of the daily scheduled shift or forty (40) hours per workweek (which may be modified pursuant to Section 6.3, Flexible Work Schedules, above).

Overtime shall be computed to the nearest fifteen (15) minutes, either way. Personal clean-up time shall count for purposes of overtime compensation.

7.3 Assignment. Overtime work must be authorized by management. An employee may be directed and assigned by the City to work in addition to the employee's regular work schedule. However, the City shall first assign overtime to qualified bargaining unit volunteers when available. The City shall equally offer overtime assignments among those bargaining unit employees in the department who volunteer for the time and are qualified to perform the necessary work. Overtime work normally performed by bargaining unit members shall not be assigned to non-bargaining unit employees when qualified bargaining unit members are available.

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Extra Board drivers are hired for the purpose of minimizing overtime liability. The above paragraph will not apply when extra drivers are available or to holdover assignments.

7.4 Form of Compensation. The employee may receive payment as compensation for overtime or shall be compensated with time off at one and one-half (1-½) times the regular rate. Compensatory time shall not accrue beyond forty (40) hours. Compensatory time off shall be taken by mutual consent and as approved by the direct supervisor consistent with the needs of the City. This Section shall not preclude the parties from mutually agreeing to temporarily exceed the 40-hour cap for an employee due to special circumstances up to two-hundred forty (240) hours.

7.5 Pyramiding. There shall be no pyramiding of overtime. Time for which overtime or premium compensation may be paid under any provision of this Agreement shall not be counted as time worked for the purpose of computing overtime or premium compensation under any other provision, or any applicable rule or regulation, it being intended and agreed that overtime or premium compensation shall not be duplicated or pyramided for the same time worked or credited.

7.6 Payment Upon Termination. Upon termination of employment, an employee shall be paid for unused compensatory time at the employee's final regular rate of pay.

7.7 Callback. Fleet employees called back to work outside of their regular work hours shall be compensated with a minimum three (3) hours of overtime. The calculation of overtime starts when the Fleet employee arrives at work and ends when the work is completed. This callback shall not apply if a Fleet employee is called back within three (3) hours of the beginning of his/her callback shift. Callback will apply on a Fleet employee's regular day off if overtime is not scheduled in a single block of time. As provided above in Section 7.5, Pyramiding, the City will not be required to compensate a Fleet employee twice for the same hours. Specifically, a Fleet employee called back more than once in a three (3) hour period shall only receive compensation for one callback. For example, one callback shall apply if a Fleet employee is called back two (2) or more times between 8:00 pm and 11:00 pm. However, if the last callback takes the Fleet employee beyond 11:00 pm, the hours that go beyond shall be compensated at the normal overtime rate. Operations employees, excluding Extra Board drivers, who are called back to work outside of their regular work hours shall receive compensation for a minimum of three (3) hours. Overtime shall be compensated for time worked in excess of eight (8) hours in any one day according to Section 7.2.

7.8 Pager Time. "Pager time" is defined as the period of time a Fleet employee is required to be ready and available for work outside of his/her regular work hours. During the pager time, the Fleet employee shall be required to respond to work calls and shall be required to comply with the City's Drug-Free Workplace & Anti-Drug and Alcohol policy. During the pager time, employees generally will be required to report to work within forty-five (45) minutes of the pager call. Fleet employees unable to report to work within forty-five (45) minutes, due to circumstances beyond their control, must communicate with their direct supervisor immediately; if the direct supervisor is unavailable, the Fleet employee must communicate with a Transit Supervisor. The City will maintain its voluntary system for standby. However, if there are no volunteers, management will be responsible to carry the pager if available. However, if management is unavailable, the City may require employees to be on standby on a rotational basis.

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Fleet employees assigned to carry the pager will be compensated one and one-half (1.5) hours of straight time for each twelve (12) hour period assigned. If Fleet employees carry the pager on a holiday as defined in Article 13.1, they will be compensated an additional four (4) hours of straight time.

Fleet employees may trade pager assignments with another qualified Fleet employee. The Fleet employee initiating the trade must immediately notify the Fleet manager of the trade.

No overtime shall be paid unless the employee is required to return to work.

ARTICLE 8 – SPECIAL ALLOWANCES

8.1 Use of Personal Vehicle. Whenever an employee is authorized to use a personal vehicle in the performance of official City duties, the employee shall be compensated at the rate established by the IRS as the maximum allowable rate for business travel. All mileage compensated shall be as a result of authorized personal vehicle use. "Authorized" means approved by the employee's Department Head or the City Manager/designee.

The City will verify and announce the allowable IRS rate as of January 1 of each year.

Employees who are required to use a personal vehicle for City use must provide proof of insurance as required by state statute when requested by the City.

8.2 Licenses. The City shall pay the fees associated with obtaining and maintaining a SMV/CDL license when required by the City to perform the duties of an employee's job, excluding the regular driver's license.

The City will continue to maintain required certificates, licenses, and memberships at no cost to employees. In the case of a required CDL, the City will pay the associated administrative fees and the basic DOT examination for obtaining and maintaining the license for any cost above that of maintaining a regular driver's license. The City will offer opportunities for desired certificates, licenses, and memberships on an available funds basis. Whenever an employee can obtain or retain a higher certification that is pertinent to their job, the City will maintain that higher level of certification so long as there is no additional cost to the City and certification of the same nature at a lower level is a requirement of his/her job.

Funds permitting, employees who have current job-related certifications, licenses, or memberships will receive first priority for maintaining these and then employees interested in obtaining job-related certifications, licenses or memberships will be allowed to receive opportunity for licenses, memberships or certifications based on a rotational system beginning with the most senior of those who volunteer.

8.3 Safety Equipment. The City shall provide required safety equipment as defined below and/or deemed necessary by OSHA and the City will replace this equipment as necessitated by wear and tear on the job.

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Hard hats, ANSI-approved safety-toed boots (up to \$150.00 for boots) (or an amount determined by the supervisor), gloves (rubber and regular), safety vests (safety and surveyor's), rubber boots, rain gear, safety glasses, hearing protection, masks and respirators.

8.4 Clothing. The City will provide clothing and reimbursements to regular full-time employees and regular part-time transit employees as provided below:

Insulated coveralls as needed.

Standard coveralls as needed.

Shirts - Transit (3), Fleet (5) annually on October 1, or as determined by the supervisor.

Uniform Pants – Transit (3) annually.

Jeans - Fleet, not to exceed \$180 per fiscal year. This benefit is taxable to the employee and will be dispersed in monthly payments.

Jackets - 1 jacket each for: Transit, as needed.
1 Spring and 1 Winter jacket for: Fleet, as needed.

Clothing and laundry service will be provided as follows:

Fleet - Standard coveralls

Where no monetary allowance is provided, employees will be required to turn in clothing and equipment in order to receive new clothes and equipment on an as needed basis.

8.5 Physical Examination. When an employee is required by the City to undergo a physical exam for licensing or certifications, such as DOT and/or FTA examinations, the City shall bear the expense for the basic examination. Employees shall be required to see the City's choice in physicians. The City shall provide three (3) different choices in physicians one of which will be female and one of which will be male. Employees receiving notice of loss of CDL or medical card must report such to the supervisor immediately.

The City shall not use these exams as fitness-for-duty exams.

8.6 Tool Allowance. The tool allowance for Mechanics has been incorporated into the salary schedule.

ARTICLE 9 – PROBATIONARY PERIOD

9.1 Original Appointments. All original appointments, including temporary appointments, shall be tentative and subject to a probationary period of not more than six (6) consecutive months from

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the date of initial employment. In the event the probationary period is interrupted, it may be extended by the period of the interruption.

In cases where the responsibilities of a position are such that a longer period is necessary to demonstrate an employee's qualifications, the probationary period may be extended in the sole discretion of the City; however, no probationary period shall be extended beyond nine (9) months. The employee and the Union shall be notified in writing of any extension and the reasons therefor. Upon the employee's request, a meeting will be scheduled where the employee will be able to discuss the extension with their supervisor. If the employee is not notified of the intent to extend probation within the first six (6) months, probation will be considered completed thereafter.

If an employee's probationary period is being extended for the purposes of obtaining a certification or license, the probationary period will end upon the employee achieving the necessary certification or license.

During the initial probationary period (including any extension thereof, but not after a promotion), the employee shall not be eligible for vacation benefits, but shall earn vacation credit to be taken at a later date. Upon request, the City may allow an employee to use earned vacation hours during probationary periods.

During the initial probationary period, the employee shall accrue and be eligible to use sick leave.

Probationary employees may be terminated or disciplined for any reason, and such action shall not constitute a violation of this contract, nor be subject to the grievance procedure.

Upon completion of the probationary period, the employee shall be considered as having satisfactorily demonstrated qualifications for the position, and shall gain regular status.

9.2 Promotional. Current non-probationary employees who are successful in their bid for a promotion within the bargaining unit, will serve a six (6) month probationary period for the sole purpose of determining whether the employee can perform the duties of the higher level job. If the employee is unable to perform the higher level duties, he/she shall be entitled to return to his/her former job with all seniority and benefits.

In the event the promotional opportunity is outside of the bargaining unit, the employee will have a right to return to the bargaining unit if their failure to make probation within six (6) months is for anything other than disciplinary reasons. Time spent outside the bargaining unit will not accrue toward bargaining unit seniority.

ARTICLE 10 – GENERAL PROVISIONS

10.1 Seniority. The City shall provide the Union with a seniority list annually. There shall be the following two types of seniority: City and Division. For the purposes of this Agreement, Divisions are Operations and Fleet.

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“City Seniority” is the length of continuous employment with the City in a regular status position.

“Division Seniority” is the length of continuous employment in a division of the Transit Department, and begins on the employee’s first working day within the bargaining unit and the Division.

City seniority will be used for determining vacation accrual.

Division seniority will be used for run bidding in Operations. Division seniority will also be used for vacation bidding in Operations and may be used for vacation bidding in Fleet.

Bidding in Operations will be done according to the bidding process in SMART’s Bidding Policy.

When there is a non-temporary vacant shift in Fleet, current Fleet employees in the classification of the vacancy will have the opportunity to select the vacant shift based on Division seniority by classification. This paragraph does not apply to temporary shift assignments.

Seniority for Operations employees within the bargaining unit on the date of ratification of the agreement, who have the same hire date, shall be determined by their hours worked within the Division. Seniority for employees who begin working in a Division after ratification of the agreement, who have the same hire date, shall be determined by the flip of a coin.

If an employee has a break in service for a voluntary reason and returns to employment within twelve (12) months of the break in service, all previous seniority and rates of vacation accrual shall be restored.

Seniority shall be terminated if an employee:

- a) Resigns for voluntary reasons and does not return within twelve (12) months.
- b) Is discharged or resigns in lieu of disciplinary action.
- c) Is laid off and fails to respond to written notice provided in Article 11, Reduction in Force.
- d) Is laid off work for a period of time greater than two (2) years.
- e) Is retired.

Seniority shall not be affected by an employee's parental leave of absence without pay.

10.2 Outside Employment. Notice of outside employment while an employee of the City shall be given to the City Manager or his/her designee. The City reserves the right to require termination of that employment when it:

- a) Proves incompatible with the employee's City work schedule;
- b) Detracts from the efficiency of the employee in his/her City work; or
- c) Results in a conflict of interest.

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10.3 Contracting Out. If contracting work out results in the layoff or demotion of current bargaining unit employees, the City shall notify the Local Union President/designee no less than seventy days (70) prior to the issuance of any request for proposals or consideration of proposals to contract out work presently and regularly performed by bargaining unit employees. Such notification shall include a detailed analysis of the likely impact on the bargaining unit, and shall also outline the supporting reasons the City deemed pertinent to its decision. If there were financial reasons underlying the decision, the supporting reasons will include economic rationale. During the seventy (70) day period, the Union shall have the opportunity to submit an alternate proposal.

The Union shall have forty-five (45) days from the receipt of such notice to request bargaining over the impact on the employee of the proposed contracting out on bargaining unit employees. Upon such timely request, the City shall meet with the Union and enter into bargaining pursuant to ORS 243.698. Parties retain arbitration rights as under ORS 243.698(4) only over the impacts of the contracting out decision.

For the purpose of this Article, effects bargaining shall only be required if the decision to contract out work will create a layoff or demotion of current bargaining unit employees. In the event of a bona fide emergency, notice may be less than seventy (70) days.

10.4 Health and Safety. The City policy shall be applicable for all employees. The bargaining unit shall be allowed to select their own members for the committee and representatives shall come from different work areas. There will be an equal number of management and bargaining unit employees on the team.

Reference to discipline in the policy may only be applied in accordance with the standard set forth in this Agreement.

10.5 Job Vacancies. Except for reclassifications, the City agrees to post all newly-created positions, promotional opportunities, and/or job openings within the bargaining unit on departmental bulletin boards for five (5) workdays prior to any other recruitment process occurring (unless otherwise mutually agreed by the City and Local President/designee), except that temporary positions may be filled without such notice if deemed necessary by the City. If the duties of the newly created job are currently being performed by a bargaining unit member, the job will be posted internally only. A copy of all postings will be delivered to the Local President/designee at time of posting.

Current employees will be given first opportunity to apply for promotional opportunities in the bargaining unit. In this instance, employees will be notified of the opportunity by a posting of the job announcement on departmental bulletin boards for at least five (5) workdays prior to the City's decision whether or not to open the recruitment to outside applicants. In the event the City decides to open the recruitment to outside applicants, the City will notify each internal applicant of the reason(s) for the decision. Regardless of whether or not the City requests outside applicants, all qualified employees will be given an opportunity to interview and full consideration for the position should they participate in an interview. Applicants that are not selected for promotion will be given an opportunity to discuss how they can become a stronger candidate and the reasons for the decision.

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10.6 Labor/Management Meetings. The parties will meet regularly to discuss labor- management issues regarding the administration of this Agreement or other issues of concern. Up to three (3) employees may attend these meetings without loss of pay - up to two (2) employees from operations and one (1) employee from Fleet.

10.7 New Contract Update. The City and Union will jointly develop and provide to all employees a new contract summary update of changes within sixty (60) days of implementation of the contract.

10.8 New Written Policies and Procedures. Whenever a new written procedure or policy is developed or a change is made to an existing written procedure or policy, the City will provide a copy to the Union President, or designee, for review fourteen (14) calendar days prior to implementation. In the event the change is determined to be a mandatory subject of bargaining and the Union makes a demand to bargain within this time, the City shall enter into bargaining pursuant to ORS 243.698. In addition, all employees in the affected division will be provided a copy of the policy or procedure prior to implementation. In the event the change is based on urgent circumstances, the City may implement upon notice to the Union. The PECBA process otherwise applies.

Transit employees and the Local Union President, or designee, will be provided a copy of all current policies and procedures annually.

10.9 Position Description. Employees will be provided a copy of their position description at the time of hire. A copy of the position description, containing signatures of both the employee and supervisor, will be placed in the employee's personnel file. Each employee's position description will be reviewed annually during their annual review. If the review results in a modification of the position description, or if a change is made to the position description between annual reviews, the employee will be given an updated copy containing signatures of both the employee and supervisor. A signed updated copy shall also be placed in the employee's personnel file.

Whenever the City desires to change a job description, it shall provide a copy of proposed changes to the Union fourteen (14) business days prior to the proposed implementation date.

10.10 Transfer of Bargaining Unit Work. Nothing prohibits the City from assigning non-bargaining unit employees, including but not limited to employees, supervisors, and managers, work presently and regularly performed by bargaining unit employees in cases of emergencies as determined by the City, absences, relief, training employees, or other incidental amounts of bargaining unit work.

ARTICLE 11 – REDUCTION IN FORCE

11.1 Layoff. If there are changes of duties in the organization, lack of work, or lack of funds, the City Manager may lay off employees.

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All temporary and seasonal positions shall be laid off prior to the layoff of any regular status bargaining unit employees, so long as the temporary work falls within the usual and customary duties of the bargaining unit employee.

An employee shall be given notice of a layoff with as much notice as reasonably possible, but no less than fourteen (14) calendar days before the effective date. Notice of the layoff will be given to the Local Union President, or designee, and to the employee.

Employees shall be laid off in a division in the inverse order of their bargaining unit seniority within the job description affected by the layoff. The City Manager shall first make every reasonable effort to integrate those employees into another position by transfer or consider alternatives to layoff by the Union.

Within individual division, a bargaining unit employee scheduled for layoff may bump the least senior employee at the same or lower salary range occupying a position the employee previously held in the employee's present department. An employee wishing to bump must exercise his or her right within five (5) calendar days from the date he or she receives his or her layoff notice. To bump to the position, the employee must have completed probation in the position they are bumping to. A bump will only be allowed if the employee is still able to perform the essential functions of the job and has all the qualifications presented in the job description. In the event an employee does not currently have the relevant certification/license, the employee is still eligible to exercise this bumping right provided the pertinent certification/license is and can be obtained within six (6) months.

An employee who bumps another employee must complete probation in the position. Failure to make probation within six (6) months will result in the employee's termination. In an effort to minimize the disruption to the workforce, an employee that is bumped will not have a right to bump and will be laid off.

When layoffs occur in a part-time position, part-time seniority cannot be applied to the same full-time position in the department. This means a part-time employee cannot bump a full-time employee under any circumstances.

11.2 Recall. Employees who were laid off shall be recalled to the position they were laid off from, if it still exists, by inverse order of their layoff, and shall remain eligible for recall for two (2) years.

11.3 Notice. It shall be the responsibility of the employees laid off to keep the City informed of the address at which they may be reached and re-employment shall be offered in person or by certified mail addressed to the last address furnished by the employee. When an offer of re-employment has been made, the laid off employee shall advise the City of acceptance within five (5) calendar days and shall report for duty within ten (10) days of the receipt of the notification by the City. Any employee who fails to accept re-employment at his/her previous position when offered by the City in accordance with provisions of this Article, shall be deemed to have forfeited all rights hereunder.

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ARTICLE 12 – COMPENSATION

12.1 Wages.

Effective July 1, ~~2017 or upon ratification and City Council approval, whichever is later~~, each employee base wage will be increased by ~~two one point five~~ percent (~~21.5~~%).

~~Effective July 1, 2018, each employee base wage will be increased by two and one quarter percent (2.25%).~~

~~Effective July 1, 2019, each employee base wage will be increased by two and one quarter percent (2.25%).~~

Trainee Driver Pay - During their training period, drivers will be paid \$1.00 above current minimum wage per hour.

12.2 Merit Increases. Movement within the employee's salary range will be granted to regular full-time and regular part-time employees annually based on satisfactory performance and continuous service. Part-time employees will be granted step increases upon either reaching 2,080 hours or the employee's anniversary date (whichever comes first). If the part-time employee reaches 2,080 hours first, then that date will become ~~their his or her~~ new anniversary date.

Movement within the salary range shall be at least four percent (4%) and The City will retain the right to grant employees movement greater than four percent (4%) and grant employees at the top of their range bonuses if deemed appropriate. Discretionary increases above four percent 4% and bonuses are not grievable. In the event movement within the City's salary range is denied, the employee will be entitled to appeal the decision through the grievance procedure. The Employer will provide reasonable notice of deficiency prior to denial of an employee's movement within the salary range.

12.3 Workers' Compensation. Employees receiving Workers' Compensation benefits will be allowed to integrate their sick leave or other paid leave with the payments so they will receive their net salary amount each pay period. The "net" shall be defined as their salary less state and federal income taxes and FICA at the time of the injury or illness.

The City will provide employees with full benefits, at the contribution levels outlined in Section 12.4, Insurance, below, while on Workers' Compensation for up to one (1) full year after the date of covered illness or injury.

The City and the Union agree that light-duty opportunities will be assigned to employees if work is available and the employee is certified by a physician to perform the duties of the position.

12.4 Insurance.

~~Effective January 1, 2015,~~ The City will contribute no more than ninety percent (90%) of the monthly premium per regular full-time employee toward either the Kaiser plans or Copay plans

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with accompanying dental options. The employee will pay the difference and will pay the monthly amount through a payroll deduction.

Regular part-time employees and Extra-Board employees will pay a percentage of the selected health insurance plan premiums on a prorated basis as determined by actual hours worked, including paid leaves approved and taken, divided by 173.33 hours per pay period. The City's contribution will not exceed ninety percent (90%) of the monthly premiums.

The City will also continue to maintain CIS Life Plan 5 (\$50,000) and the matching accidental death and dismemberment benefit.

The City shall not be obligated to increase its contributions to the plans after ~~June 30, 2017~~ November 30, 2020, unless otherwise mutually agreed or negotiated by the parties.

The City will provide employees with the opportunity to contribute to a Flexible Spending Account.

12.5 City's Right to Modify Plans and/or Benefits. The Employer retains the right to change the plan benefits, insurance carriers, and/or administrators as long as it provides benefits comparable to the City's current healthcare plan set forth in Section 12.4, Insurance.

12.6 Retirement. The City shall continue to participate in the Public Employees Retirement System(PERS)/Oregon Public Service Retirement Plan Pension (OPSRPP) or any successor plan as required by the governing statutes and administrative rules and will continue to pick-up the employee's contribution of six percent (6%). In the event it is determined by the Legislature, courts, or initiative that the City cannot pick up the employee's contribution, the six percent (6%) shall revert to salary.

The City will continue to participate in the program for use of unused accumulated sick leave as an "option" choice for employees as provided by statute and administrative rule.

12.7 Work Out of Classification. Assignments of personnel to a higher classification on an acting basis may be made by the City. When such assignments are made, they shall be specific and placed in writing to the employee. When so assigned for more than four (4) hours in the workday, the employee shall be compensated at five percent (5%) above their current salary for each hour worked in the higher classification.

The City will not change assignments to avoid payment on work out of class, unless such change is an operational necessity.

12.8 Promotion. Employees that are promoted shall receive at least a five percent (5%) pay increase. Reclassifications are not subject to Section 12.8.

12.9 Reclassification. In order to provide easy access for employees, the City will place the City's employee handbook and all classification descriptions for the bargaining unit on the City's intranet. The City will acknowledge receipt of reclassification requests within ten (10) calendar

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days. Whenever requests for reclassification are made under this appendix, the City will notify the Union President.

Employees that are reclassified to a higher pay range will be moved to the higher range based on the percentage difference between the two ranges. Thereafter, the employee will move on the range based upon the anniversary date that was established in their prior classification. For example, if the ranges are two and one-half percent (2½%) apart, the employee will receive a two and one-half percent (2½%) increase, so long as such increase does not exceed the range the employee is moving to. In other words, in establishing the salary for the reclassified employee, the relative position within the new pay range shall be the same as the relative position in the former range.

ARTICLE 13 - HOLIDAYS

13.1 Holidays Observed. The City shall observe the following paid holidays:

- | | |
|---|---------------------------------------|
| New Year's Day - January 1st | Labor Day - First Monday in September |
| M. L. King, Jr.'s Birthday - 3rd Mon. in Jan. | Veterans' Day - November 11th |
| Presidents' Day - 3rd Monday in February | Thanksgiving Day—4th Thursday in Nov |
| Memorial Day - Last Monday in May | Day after Thanksgiving |
| Independence Day - July 4th | Christmas Day - December 25th |

All regular full-time City employees shall be paid eight (8) hours at their regular straight-time hourly wage for all holidays referred to under this Section. An employee has the option of using vacation, compensatory time, leave without pay, or work extra hour(s) to offset this benefit when given a day off that exceeds eight (8) hours within the pay period.

Regular part-time employees with a fixed route shall receive holiday pay on a prorated basis, as determined by their FTE, not to exceed eight (8) hours.

Extra Board employees shall receive holiday pay on a prorated basis, as determined by their paid hours in the pay period during which the holiday falls, including approved paid sick, vacation, and comp time, divided by the number of hours in the pay period, minus eight (8) hours per holiday, not to exceed eight (8) hours.

Eligible employees must work their scheduled days immediately before and immediately after the holiday in order to receive holiday pay, unless they provide a note from a healthcare professional excusing their absence on the scheduled day immediately before or immediately after the holiday. The employee must provide such note from a healthcare professional to his/her supervisor or manager no later than 5:00 p.m. on the third business day following the employee's return to work. The day of the employee's return to work shall count as the first business day.

13.2 Holidays Falling on Scheduled Days Off. For employees whose normal week is Monday through Friday, whenever a holiday falls on Saturday, the preceding Friday shall be given as a holiday. If it falls on Sunday, the following Monday shall be given as a holiday. The same pattern will be followed for employees whose workweek is other than Monday through Friday. Whenever

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a holiday falls on an employee's first day off, the preceding day shall be considered the holiday. When a holiday falls on an employee's second day off, the following day shall be considered the holiday.

When a holiday falls on a Monday or Friday giving the majority of City employees a three (3) day weekend, an employee whose days off are other than Saturday and Sunday may, with Supervisor approval, choose to take the day preceding or the day after their weekend off as a holiday in lieu of taking the actual holiday, thus giving them a three (3) day weekend like other City employees.

13.3 Holidays During Leave. Holidays that occur during paid leave time of any type shall not be charged against such leave.

13.4 Holiday Pay. If any employee works on a recognized holiday, that employee shall be paid for all hours worked at time and one-half the regular rate of pay plus regular holiday pay. The time and one-half pay specified above shall occur only on the actual holiday.

13.5 Holiday Work. In scheduling holiday work, the City shall first solicit volunteers from the qualifying work group and give all volunteering employees equal opportunities for holiday work by rotating assignments. When insufficient numbers of people volunteer for holiday work, employees (other than temporary and seasonal employees) shall be assigned on a rotational basis by inverse seniority.

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ARTICLE 14 - VACATION

14.1 Accrual.

Vacation leave shall accrue monthly and may be taken when earned. Full-time employees will accrue vacation according to the following accrual schedule:

<u>Months of Service</u>	<u>Accrued Leave Hours (rate)</u>
0-60	8 hours / 12 days
61-120	11.33 hours / 17 days
121-180	13.33 hours / 20 days
181+	16 hours / 24 days

Part-time employees shall accrue vacation leave on a prorated basis, as determined by their paid hours in each pay period, including approved paid leaves, divided by the number of hours in the respective pay period, not to exceed the maximum monthly accrual for full-time employees.

14.2 Eligibility. New employees shall not be eligible for vacation leave during probation, although vacation leave shall accrue from the beginning of employment. Up to 40 hours of vacation may be taken after satisfactory completion of probation. Upon request, the City, may allow an employee to use earned vacation days during probationary periods.

14.3 Maximum Accrual. Employees shall be required to take one (1) week of vacation per year, but may only accrue up to 240 hours of vacation leave with pay.

14.4 Scheduling. Supervisors shall schedule vacation for their respective employees with due consideration for the desires of the employees and the City’s work requirements. Vacation schedules may be amended to allow each supervisor to meet emergency situations. In the event that more than one (1) employee has requested the same vacation period off and the workload does not permit all employees to have that period off, the supervisor shall first ask for any volunteers who are willing to reschedule their request. In the event there are insufficient volunteers, preference shall be granted on the basis of Division seniority provided, however, that each employee may only exercise their seniority for vacation bidding once per calendar year, notwithstanding the vacation bidding process for Operations employees.

Operations employees will bid twice annually for vacation leave based on their Division seniority. Each Operations employee will have two (2) business days once they receive notification to place their bid. Once the most senior Operations employee places a bid, the next senior employee will be allowed to bid and so on. If an Operations employee misses the deadline for their bid, the next senior Operations employee will be allowed to bid.

The first round of vacation bidding will begin on the first business day in November and will not extend beyond the last business day in December. The bid will encompass the calendar year immediately following the completion of the first round of vacation bidding and the first week of the subsequent year. Vacation bids will be for a single specified vacation period.

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The second round of vacation bidding will begin immediately following the conclusion of the first round of bidding, based on Division seniority. Each Operations employee will have two (2) business days once they receive notification to place their bid. Once the most senior Operations employee places a bid, the next senior employee will be allowed to bid and so on. If an Operations employee misses the deadline for their bid, the next senior Operations employee will be allowed to bid. The second round of bidding will not extend beyond the last business day in February and will encompass May 1 through December 31 of the calendar year during which the second round of vacation bidding is completed. Vacation bids will be for a single specified vacation period.

After the first round of vacation bidding is complete, all requests for vacation leave between January 1 and April 30 will be evaluated on a first-come first-served basis, subject to the City's operational needs. After the second round of vacation bidding is complete, all requests for vacation leave between May 1 and December 31 will be evaluated on a first-come first-served basis, subject to the City's operational needs. Management will notify employees at the conclusion of each round via department bulletin board.

14.5 Pay Upon Separation. Upon termination of employment, unused vacation benefits earned will be paid out with the final paycheck.

14.6 Vacation Cancellation. In the event approved vacation leave is canceled by the City, the employee shall be notified of the cancellation in writing. Unrecoverable transportation, lodging deposits or other bona fide expenses such as hunting tags, event tickets, etc., will be paid by the City.

14.7 Vacation Transfer. Subject to the requirements above in maximum accrual, the City shall have a leave sharing plan that will allow employees to transfer accumulated vacation leave to a leave sharing bank that satisfies the requirements of federal law. Employees who suffer "a medical emergency," including serious injuries or illnesses as defined by FMLA, and who have exhausted all paid leaves are eligible to receive leave donated by a coworker into the leave sharing bank. The employee shall request leave donations in writing to the Human Resources Department.

Whenever an employee is receiving wages and benefits as a result of donated time, the donated time shall be used to offset any and all benefits or roll-up expense to the City.

ARTICLE 15 – SICK LEAVE

15.1 Accrual. All regular full-time City employees shall earn sick leave with full pay at the rate of eight (8) hours for each calendar month of service. Sick leave shall accrue from the date of employment.

Part-time employees shall accrue sick leave on a prorated basis, as determined by their paid hours in each pay period, including approved paid leaves, divided by the number of hours in the respective pay period, not to exceed eight (8) hours.

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Seasonal and temporary employees shall accrue sick leave at the rate of one (1) hour accrued for every thirty (30) hours worked.

15.2 Utilization. Employees are eligible for sick leave for the following reasons:

- a) Non-occupational personal illness or physical disability.
 - b) Quarantine of an employee by a physician for non-occupationally related disability.
 - c) Illness of an immediate family member requiring the employee to remain at home. For the purposes of this Section, immediate family member shall include spouse, domestic partner, parents (including step-parents and in loco parentis), children (including step-children and foster children), current father-in-law and mother-in-law, grandparents, grandchildren, and other relatives living in the employee's household.
 - d) Necessity for medical or dental care.
- ~~d)e)~~ For any reason defined in the Oregon Paid Sick Leave Law, ORS 653.601-653.661.

Any time utilized under this Section will be utilized in increments of fifteen (15) minutes which will be rounded up to the next quarter (1/4) hour on each occasion.

Written proof of the need for sick leave from the attending physician may be required at the City's discretion for absences in excess of three (3) consecutive work days, or if the City has reason to believe that the employee is abusing sick leave privileges. Misuse of sick leave benefits will be subject to disciplinary action.

15.3 Notification. An employee who is unable to report for work as scheduled shall report the reasons for absence to their his/her supervisor, when possible, one (1) hour prior to the time the employee is expected to report for work. Sick leave with pay shall not be allowed unless such report has been made or unless special circumstances existed to justify the failure to report. Additionally, the employee must call in to report any continuing need to be absent to their/his/her immediate supervisor prior to the start of each subsequent shift to be eligible for sick leave benefits on these workdays. No daily notice will be required when the employee has submitted a doctor's slip which specifically states they he/she will be unable to return to work until a certain date.

Transit employees must call in an absence at least one (1) hour prior to the start of their shift.

15.4 Use of Other Accrued Leave. Once sick leave is exhausted, an employee with a serious illness or injury can use other forms of accrued leave (e.g., vacation, compensatory time, etc.).

15.5 Family Medical Leave. Employees shall be granted twelve (12) weeks leave upon request pursuant to ORS 659a.150-186. Employees must use accrued vacation, sick leave, compensatory time, and/or leave without pay while on Family Medical Leave. The employee shall submit their his/her request for Family Medical Leave in writing.

15.6 Physician Evaluation. The City may require an employee to see a physician of the employee's choice whenever it objectively believes the employee may be unable to safely perform their job. The employee will bear the cost of the physician's visit. When it becomes necessary to seek a physician certification, the City will inform the employee and the local Union

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President/designee and place the employee on paid administrative leave until the employee can be examined. The City will be required to pay the employee for the time spent traveling to and from the doctor if outside of the administrative leave time and will pay mileage. If concerns regarding the employee's ability to safely perform ~~their~~ ~~his/her~~ job continue, the City may require the employee to see a physician of the City's choosing. The City will bear the cost of the physician's visit. When it becomes necessary to seek a physician certification, the City will inform the employee and the local Union President/designee and place the employee on paid administrative leave until the employee can be examined. The City will be required to pay the employee for the time spent traveling to and from the doctor if outside of the administrative leave time and will pay mileage.

15.7 Transfer. The City shall have a leave sharing plan that will allow employees to transfer accumulated sick leave to a leave sharing bank that satisfies the requirements of federal law. Employees who suffer "a medical emergency," including serious injuries or illnesses as defined by FMLA, and who have exhausted all paid leaves are eligible to receive leave donated by a coworker into the leave sharing bank. The transferring employee must maintain a sick leave balance for ~~their~~ ~~his/her~~ own use of at least 480 hours. The employee shall request leave donations in writing to the Human Resources Department.

Whenever an employee is receiving wages and benefits as a result of donated time, the donated time shall be used to offset any and all benefits or roll-up expense to the City.

15.8 Required Leave. The City Manager/designee may require an employee to use sick leave and leave the work place if it is determined the employee is too ill to work or could transfer their illness to the public or other employees.

15.9 Return to Work. The City may require an employee to provide a note from their personal physician stating they are able to return to work when returning from sick leave. The note may only be required when the employee has been under the care of a physician.

15.10 Long Term Disability Insurance. The City will provide employees with long-term disability insurance as specified in the attachment to this contract.

ARTICLE 16 – EDUCATIONAL OPPORTUNITIES

16.1 Tuition Reimbursement. The City will reimburse an employee for full tuition costs for one (1) class per term, not to exceed three (3) classes per year, provided that:

- a) The class is directly related to the employee's work (or to a position to which an employee can reasonably expect to be promoted).
- b) The employee has made prior arrangement with his/her supervisor and received written approval from the City Manager/designee for reimbursement prior to registration for such course.

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- c) Prior to reimbursement by the City, the employee must submit evidence of satisfactory completion of the course. Satisfactory completion means the employee receives a grade of “C” or better, or a passing grade in a pass/fail class.
- d) The employee is not receiving reimbursement for tuition from any other source.
- e) The employee agrees to continue employment with the City at least six (6) months following satisfactory completion of the course or will reimburse the City for tuition costs paid during his/her last six (6) months of employment with the City.

16.2 Leave and Expenses. The City shall allow time off with pay and shall pay all expenses of attending classes, lectures, conferences, or conventions, when attendance is on an assignment basis and approved by the City Manager/designee. Studying or preparing for classes, lectures, conferences, or conventions shall not be allowed on work time.

Employees who are required to attend out-of-town training, either by the department supervisor or as required by the City to maintain required job-related certifications/licenses, will be paid for the travel time outside of their normal schedule, consistent with Oregon Administrative Rule 839-020-0045. Travel time for required local training will also be paid if it exceeds the normal commute time the employee experiences traveling to and from work. If this time causes them to exceed forty (40) hours in a week, it will be paid at the applicable overtime rate or the employee may flex their schedule to compensate for the hours. However, if it is foreseeable that the travel time will cause the employee to exceed forty (40) hours in a workweek, the employee must receive the City’s approval of the overtime. Meals shall be re-reimbursed according to the City’s Travel Policy. Employees who voluntarily attend training that is approved by the City during the employee’s normal work schedule shall only be compensated for their normal work schedule.

16.3 Work-Related Courses. When an employee wishes to take a work-related course(s) which is only offered during regular working hours, the employee must receive written approval from the City Manager/designee and make prior arrangements with his/her supervisor. In that event, the City Manager/designee will:

Pay for the cost of the course and related tests in advance, provided that the employee takes the necessary time off without pay or makes prior arrangements with his/her supervisor for alternative working hours. In the event the employee fails to pass or complete the course or tests, the employee will be required to reimburse the City for the advanced costs; or

Allow time off with pay provided the employee pays his/her own tuition costs and prior arrangements are made with his/her supervisor and approved by the City Manager/designee.

16.4 Cost of Textbooks. The cost of textbooks and technical publications required for courses for an employee’s current position shall be the responsibility of the City. Upon completion of such courses, the textbooks and technical publications shall remain City property.

ARTICLE 17 – OTHER LEAVES

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17.1 Criteria and Procedure. All requests for an unpaid leave of absence shall be submitted in writing to the City Manager or a designee. The written application must describe the reason for the request and confirm a specified date at which the employee is expected to return to work.

17.2 Approval. Requests for leave will be evaluated on a case-by-case basis with the operational requirements of the City in mind. Subject to those requirements, approval will not be unreasonably withheld. Requests for leave to conduct Union business will be evaluated in a non-discriminatory fashion.

17.3 Termination of Leave. Notice that the employee has accepted employment or entered into full-time business or occupation may be accepted by the City as a resignation when the employment or business is inconsistent with the reason leave was requested and granted. Any employee who is granted a leave of absence without pay under this Section and who inexcusably fails to return to work immediately upon the expiration of said leave of absence, shall be considered as having resigned his/her position with the City.

17.4 Employee Status. Employees on leave without pay remain employees covered by this Agreement, entitled to its non-economic benefits such as access to the grievance procedure. Unless required by law or otherwise specified in this Agreement, employees on leave without pay shall not accrue any economic benefits, including seniority.

17.5 Bereavement Leave. Full-time employees may be granted up to forty (40) hours of paid leave in the event of the death of an immediate family member. The leave is intended to allow the employee time to attend the funeral and make necessary arrangements. Part-time employees may be granted bereavement leave on a pro-rata basis. An immediate family member includes: spouse, domestic partner, parent or step-parent, children, step-children, brother, sister, mother-in-law, father-in-law, brother-in-law, sister-in-law, maternal grandparents, paternal grandparents, grandchildren, or a person with whom the employee was in a relationship of in loco parentis. Upon application and mutual agreement with the employee's supervisor, the employee may use accumulated leave after the forty (40) hours of compensated leave. Such request for additional leave shall not be unreasonably denied.

Deviations from the definition of immediate family shall not be allowed; however, the City will consider other leave for employees that wish to take time off as a result of some other person that is significant to him/her.

Bereavement leave under this section will be counted as OFLA leave to the extent allowed by law.

17.6 Witness and/or Jury Duty. When a City employee is called for jury duty or is subpoenaed as a witness in a criminal matter, or in a civil matter arising from their City employment, he/she will not suffer any loss of regular City compensation he/she would have earned during such absence. Employees are required to waive the jury/witness fee provided by the court. Employees must either waive the juror/witness compensation or must sign the funds over to the City.

17.7 Military. Military leave is granted to all employees absent from work due to service in the U.S. uniformed services in accordance with the Uniformed Services Employment and

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Reemployment Rights Act (USERRA) and state law. Generally, advanced notice is required prior to taking military service or training leave.

17.8 Inclement Weather. In the event an employee is unable to make it to work because of inclement weather or the City offers to send employees home as a result of the same, the employee will have the option of using any accrued leave, except sick leave, or take leave without pay.

If an employee reports for work during inclement weather and the City decides to not have the employee work, the employee shall be compensated for a minimum of two (2) hours of work.

ARTICLE 18 – DISCIPLINE

18.1 Discipline and Discharge. No covered employee shall be disciplined or discharged except for just cause. Oral warnings, even if reduced to writing, are not considered to be discipline and may not be protested through the grievance procedure. Disciplinary actions include, but are not limited to: written reprimands, suspensions, demotions and discharge. Whenever an employee is disciplined the employee shall sign the notice of disciplinary action as specified in Section 20.4, Signature Requirement, unless the employee refuses to do so.

Informal discipline and corrective actions, such as counseling, specific directives, work improvement plans, oral warnings (even if reduced to writing) and other similar actions are not considered discipline and will not be placed in the personnel file as such. Informal discipline and corrective actions are not subject to the grievance procedure. Informal discipline and corrective actions may be used for notice of progressive disciplinary sanctions and are subject to review in yearly evaluations. Employees may provide written rebuttal within ten (10) calendar days, to be placed with the informal discipline or corrective action.

18.2 Excluded Employee. Probationary employees (as defined in Section 9.1, Original Appointments), less-than-half-time, temporary, and seasonal employees may be terminated or disciplined for any reason, and such action shall not constitute a violation of this contract, nor be subject to the grievance procedure.

18.3 Imposition. If a supervisor has reason to discipline an employee, ~~they he/she~~ shall make a reasonable effort to impose such discipline in a manner that will not unduly embarrass the employee before other employees or the public.

18.4 Representation Rights. Upon request, an employee will be entitled to have a Union/employee representative present whenever the employee is being interviewed regarding a matter that could lead to a disciplinary action against the employee. The Union/employee representative will have a reasonable amount of time, without the loss of pay, not to exceed a cumulative total of ~~thirty (30)+5~~ minutes before and/or after an interview, to consult with the employee. An employee's representation rights may only be invoked in accordance with the standard set forth by the Oregon Employment Relations Board. During any interview of this nature, either party may record the proceeding. If the meeting is recorded, the party making the

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recording will be obliged to provide a copy of the recording if requested by the other party. If a copy of the recording is requested, a reasonable fee may be imposed.

The supervisor is encouraged to advise an employee of ~~their~~ his/her right to Union representation on a matter that might lead to discipline.

18.5 Investigations. The City will conduct investigations in a timely, reasonable manner. Notice of the investigation to the employee will include the alleged conduct and the applicable alleged policy violation(s).

The City will advise the employee who is the subject of an investigation and the Union at least every fifteen (15) calendar days of the status of the investigation until the investigation is completed. Following the completion of an investigation that does not result in discipline, the City will advise the employee and the Union that the investigation is complete. Employees can ask the City not to advise the Union under this paragraph, in which event the City shall not advise the Union.

18.6 Due Process. Prior to imposition of an economic disciplinary sanction, the following procedural due process shall be followed:

- a) The employee shall be given advance written notice of the charges or allegations that may subject them to discipline and of the disciplinary sanctions being considered.
- b) The employee will be given an opportunity to refute the charges or allegations either in writing or orally in an informal hearing prior to the implementation of any discipline. If discharge is the disciplinary sanction being considered, the employee will be given at least seven (7) calendar days' notice of any informal hearing, unless mutually agreed to schedule it earlier.

18.7 Just Cause Standards. For the purpose of this Agreement, just cause shall be determined based on the following questions:

- a) Did the City give the employee forewarning or foreknowledge of the possible or probable disciplinary consequences of the employee's conduct?¹
- b) Was the City's rule or managerial order reasonably related to a) the orderly, efficient or safe operation of the City's business; and b) the performance the City might properly expect of the employee?
- c) Did the City, before administering discipline to an employee, make an effort to discover whether the employee did in fact violate or disobey a rule or order of management?
- d) Was the City's investigation conducted fairly and objectively?

¹ The parties agree that there are some offenses that are so egregious that forewarning of consequences is not necessary.

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- e) At the investigation, did the City obtain substantial and compelling evidence or proof that the employee was guilty as charged?
- f) Has the City applied its rules, orders and penalties evenhandedly and without discrimination to all employees?
- g) Was the degree of discipline administered by the City reasonably related to a) the seriousness of the employee's proven offense; and b) the record of the employee and his/her service with the City?

18.8 Notice of Discipline. When an employee is disciplined, the Local President/designee will be given notice of the action against the employee, unless the employee declines that such notice be given.

18.9 Discovery Materials. In the event the Union or employee requests a copy of the disciplinary investigation or related materials, the City may apply reasonable costs for copies or administrative time beyond the de minimis standard.

ARTICLE 19 – GRIEVANCE PROCEDURE

19.1 Grievance Defined. A grievance is any dispute concerning the application, interpretation or enforcement of this Agreement.

19.2 Grievance Procedure. This shall be the exclusive procedure and remedy involving any alleged violation of this Agreement.

Step 1. The employee, with or without a Union representative, shall first take up the grievance with his/her immediate supervisor within fourteen (14) calendar days immediately following the date the employee had or should have had knowledge of the grievance. A union representative at this step is intended to provide support and clarification for the employee and normally will not present the grievance. The supervisor will then issue a response within fourteen (14) calendar days immediately following the date the employee discussed the grievance with his/her immediate supervisor.

Step 2. If the grievance is not resolved at Step 1, the affected employee(s) shall present the grievance in writing to the Transit Director with a copy to Human Resources within ten (10) calendar days immediately following the date his/her immediate supervisor's response was received or communicated to the affected employee. At this and each subsequent step of the grievance procedure, the written grievance submitted by the Union or employee(s) shall include:

- a) A statement of the grievance and the factual allegations upon which it is based;
- b) The Section(s) of this contract alleged to have been violated;
- c) The remedy sought; and

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- d) The name and signature of the affected employee(s), except in the case of a group grievance. In such case, an officer of the local union will sign.

Within ten (10) calendar days of receipt of the Step 2 grievance, the Transit Director and Human Resources will meet with the grievant and, if the grievant requests, a representative of the Union. In the event a meeting cannot be scheduled because of the unavailability of any party, the parties shall then mutually agree to another date. In any event, the grievant/Union will be given at least twenty-four (24) hours' notice of such meeting. Grievances filed by the City shall be initiated at Step 2 and filed with the Union's President.

The Transit Director shall render a written decision within ten (10) calendar days following the Step 2 meeting.

Step 3. If the grievance is not resolved at Step 2, the affected employees(s) shall present the grievance in writing to the City Manager within ten (10) calendar days following the Transit Director's response.

Within ten (10) calendar days of receipt of the Step 3 grievance, the City Manager will schedule a meeting to discuss the grievance with the grievant, and if the grievant requests, with a Union representative. In the event a meeting cannot be scheduled because of the unavailability of any party, the parties shall then mutually agree to another date. In any event, the grievant/Union will be given at least twenty-four (24) hours' notice of such meeting. The City Manager shall render a written decision within ten (10) calendar days following the Step 3 meeting.

Step 4. (Optional) Mediation. In the event the grievance is not resolved at Step 3, and within ten (10) calendar days of the City Manager's response at Step 3, either party, the Union or the City, may request mediation in writing. Mediation will occur only if the City and the Union mutually agree to mediation in writing. The parties will agree to a mutually acceptable mediator. Costs for the mediator will be shared equally. The period of mediation will be no longer than sixty (60) calendar days after the date of the initial request for mediation (the mediation period). The parties agree to act in good faith to resolve the grievance. If the grievance is not resolved at Step 4, either party may move the grievance to Step 5, Binding Arbitration, within ten (10) calendar days after the end of mediation. The parties may mutually agree to extend the mediation period in writing before the end of the mediation period.

Step 5. If the grievance is not resolved at Step 3 or 4 and if the Union or the City wishes to pursue the grievance further, the party shall submit the grievance to arbitration by written notice to the City Manager or Union President within ten (10) calendar days following the due date for the Step 3 response or the date the Step 3 response was received, whichever date is sooner, or as described in Step 4.

Unless the parties mutually agree upon an arbitrator, the party requesting arbitration shall, within fourteen (14) calendar days of their notice to proceed to arbitration, submit a written request to the Oregon Employment Relations Board for a list of the names of seven (7) arbitrators with their principle place of residence in Oregon or Washington. Upon receipt of the list, the parties shall

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determine by the toss of a coin who will strike first, and the parties shall then continue to alternate strikes until only one (1) name remains and the remaining name shall be the arbitrator.

The arbitrator shall have no power to modify, add to or subtract from the terms of this Agreement and shall be confined to the interpretation and enforcement of this Agreement. The arbitrator's decision shall be in writing and shall be submitted to the parties within thirty (30) calendar days following the close of the hearing. The arbitrator's decision shall be final and binding on the affected employee(s), the Union and the City.

Either party may request the arbitrator to issue subpoenas but, if issued, the cost of serving a subpoena shall be borne by the party requesting the subpoena. Each party shall be responsible for compensating its own witnesses and representatives during the arbitration hearing. The non-prevailing party shall pay arbitrator's fees and expenses, and the arbitrator, as part of the award, shall designate the non-prevailing party for such purpose.

19.3 Time Limits. All parties subject to these procedures shall be bound by the time limits contained herein. If either party fails to follow such limits, the following shall result:

- a) If the grievant or the Union fails to advance the grievance to the next step in a timely fashion, the right to binding arbitration of the grievance shall be waived.
- b) If the City or the Union, at any step, fails to respond in a timely fashion, the grievance shall proceed to the next step.

Time limits may be extended by written mutual agreement of the parties.

19.4 Discovery Materials. In the event the Union requests materials for review, such as for processing a grievance, the City may apply reasonable costs for copies or administrative time beyond the de minimis standard.

ARTICLE 20 – PERSONNEL RECORDS

20.1 Access. Each employee shall have the right to review and copy (at his/her own expense) the contents of their own personnel file. In addition to the Union's rights as the exclusive representative, at his/her option and upon presentation of a signed release, an employee may authorize a Union representative to review the contents of his/her file.

20.2 Disciplinary Records. Each employee shall be given a copy of all disciplinary materials placed in his/her file. An employee may include an explanatory statement for the personnel file in answer to any reprimand or other form of discipline if the employee chooses not to grieve such action.

20.3 File Purging. Written reprimands/warnings shall be removed from an employee's file, at his/her request, after three (3) years so long as no other disciplinary action has occurred within the three (3) year time period. Any material, other than performance evaluations, directly associated

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with the items being purged, will also be removed from the file. Documents removed from the personnel file shall be placed in a confidential file maintained by the Human Resources Department. Such purged document will not be used against an employee for the purpose of progressive discipline. Purged documents may be used in any civil or arbitration proceeding for the purpose of establishing consistency of disciplinary action, lack of discrimination, the existence of mitigating or extenuating circumstances and compliance with legal obligations. The Union will have equal access, upon request, to these files for the same purposes.

20.4 Signature Requirement. Before any material reflecting negatively on the employee is placed in the employee's file, the employee shall sign a receipt containing the following disclaimer:

"Employee's signature only acknowledges receipt of material. The employee's signature does not necessarily indicate agreement or disagreement."

This shall not apply to a termination notice if the employee refuses to sign the document.

ARTICLE 21 - STRIKES

21.1 Prohibition. The Union and its members, as individuals or as a group, will not initiate, cause, participate or join in any strike, work stoppage, or slowdown, or any other restrictions of work, at any location in the City during the term of this contract. Employees in the bargaining unit, while acting in the course of their employment, shall not honor any picket line established in the City by the Union or by any other labor organization when called upon to cross picket lines in the line of duty. Disciplinary action, including discharge, may be taken by the City against any employee or employees engaged in a violation of this Article.

21.2 Union Obligation. Pursuant to PECBA, this unit is Strike Prohibited. In the event of a work stoppage, slowdown, picketing, observance of a picket line, or other restriction of work in any form, either on the basis of individual choice or collective employee conduct, the Union will immediately, upon notification, attempt to secure an immediate orderly return to work.

21.3 Lockout. There shall be no lockout of employees during the term of this Agreement.

ARTICLE 22 – SAVINGS CLAUSE

Should any portion of this contract be contrary to law, such decision shall apply only to the specific portion thereof directly specified and all other provisions of this Agreement shall remain in full force and effect for the duration of this Agreement. Upon such declaration, the parties agree to negotiate regarding the invalidated portion thereof. Negotiations shall commence within thirty (30) days, unless the parties mutually agree to extend such time frame.

ARTICLE 23 – STATUS OF AGREEMENT

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23.1 Complete Agreement. This Agreement incorporates the sole and complete agreement between the City and the Union resulting from these negotiations.

23.2 Amendments. This Agreement may be amended at any time by mutual Agreement of the Union and the City. Such amendments shall be in writing and signed by both parties.

In the event the City wishes to implement or change any condition of employment that is a mandatory subject of bargaining which was not discussed in the negotiations that created the current Agreement, the City shall be obligated to inform the Union of the condition it wishes to implement or change and bargain at the Union's request. For the purpose of this Section, the Union will have fourteen (14) calendar days to make a demand to bargain. If the Union demands to bargain, the City shall enter into bargaining pursuant to ORS 243.698. If the Union does not demand to bargain, the City may implement or change the condition it has proposed. The Union waives any right to bargain matters it raised during negotiations but which were not embodied in the Agreement.

ARTICLE 24 – TERM OF AGREEMENT

This Agreement shall be effective upon execution. The Agreement shall remain in full force and effect through June 30, ~~2020~~2021, and shall be automatically renewed from year to year thereafter, unless either party shall notify the other in writing no later than January 1 of the expiring year that it desires to either terminate or modify this Agreement. In the event notice to modify is given, negotiations shall begin not later than ~~sixty thirty (360)~~ days from that notice.

This Agreement is hereby executed on this ____ of _____, 2020~~17~~ by:

The City of Wilsonville

SEIU Local 503, OPEU

Bryan Cosgrove
City Manager

~~Brian Rudiger~~ Melissa Unger
Executive Director, SEIU Local 503, OPEU

~~Joseph Cartino~~ Madison Hibler
~~Senior Bargaining~~ Organizer, SEIU Local 503,
OPEU

Jeanette Patton ~~Daniel Gonzalez~~, Bargaining Team
Member

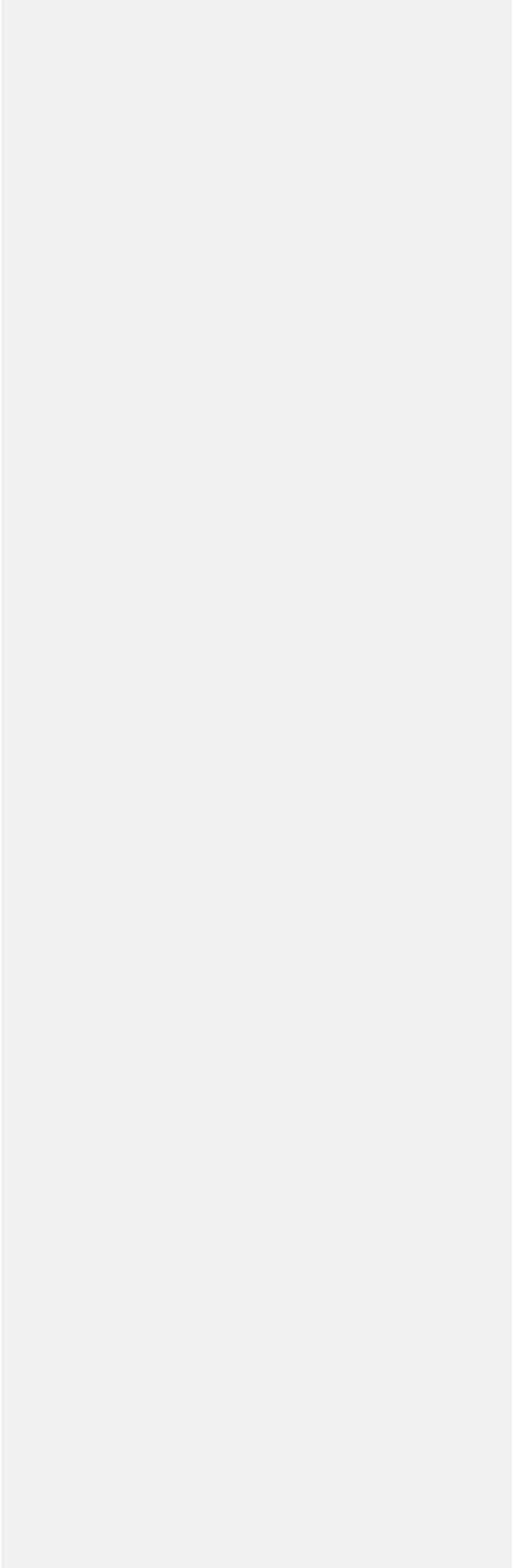
Michael Ortega ~~Michael Ortega~~, Bargaining Team
Member

City of Wilsonville & SEIU 503, OPEU

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FULLY RECOMMENDED TENTATIVE AGREEMENT 05-06-2020**APPENDIX A – SALARY SCHEDULE**

Effective July 1, 2020 (COLA 1.50%)

Range Position	Hourly		Biweekly (Full-Time)		Annual (Full-Time)	
	Low	High	Low	High	Low	High
120 Fleet Hostler	\$ 17.41	\$ 22.20	\$1,392.80	\$1,776.00	\$ 36,212.80	\$ 46,176.00
125 Equipment Mechanic I	\$ 19.71	\$ 25.10	\$1,576.80	\$2,008.00	\$ 40,996.80	\$ 52,208.00
125 Transit Driver	\$ 19.71	\$ 25.10	\$1,576.80	\$2,008.00	\$ 40,996.80	\$ 52,208.00
128 Dispatcher	\$ 21.21	\$ 27.05	\$1,696.80	\$2,164.00	\$ 44,116.80	\$ 56,264.00
133 Equipment Mechanic II	\$ 24.72	\$ 31.51	\$1,977.60	\$2,520.80	\$ 51,417.60	\$ 65,540.80



**CITY COUNCIL MEETING
STAFF REPORT**

<p>Meeting Date: June 15, 2020</p>	<p>Subject: Resolution No. 2826 Letter of Agreement between the City of Wilsonville and Wilsonville Municipal Employees Association (WilMEA)</p> <p>Staff Member: Jeanna Troha, Assistant City Manager and Andrea Villagrana, Human Resources Manager</p> <p>Department: Human Resources</p>
<p>Action Required</p>	<p>Advisory Board/Commission Recommendation</p>
<p><input checked="" type="checkbox"/> Motion</p> <p><input type="checkbox"/> Public Hearing Date:</p> <p><input type="checkbox"/> Ordinance 1st Reading Date:</p> <p><input type="checkbox"/> Ordinance 2nd Reading Date:</p> <p><input checked="" type="checkbox"/> Resolution</p> <p><input type="checkbox"/> Information or Direction</p> <p><input type="checkbox"/> Information Only</p> <p><input type="checkbox"/> Council Direction</p> <p><input type="checkbox"/> Consent Agenda</p>	<p><input type="checkbox"/> Approval</p> <p><input type="checkbox"/> Denial</p> <p><input type="checkbox"/> None Forwarded</p> <p><input checked="" type="checkbox"/> Not Applicable</p> <p>Comments: N/A</p>
<p>Staff Recommendation: Staff recommends that Council adopt Resolution No. 2826.</p>	
<p>Recommended Language for Motion: I move to approve Resolution No. 2826.</p>	
<p>Project / Issue Relates To:</p>	
<p><input type="checkbox"/> Council Goals/Priorities</p>	<p><input type="checkbox"/> Adopted Master Plan(s)</p>
<p><input checked="" type="checkbox"/> Not Applicable</p>	

ISSUE BEFORE COUNCIL:

Oregon Statute requires the governing body approve Collective Bargaining Agreements between the Employer and labor unions. The issue before the City Council is consideration of the Letter of Agreement between the City of Wilsonville and Wilsonville Municipal Employees Association extending the Collective Bargaining Agreement through June 30, 2020 with a wage increase of 1.5% effective July 1, 2020.

EXECUTIVE SUMMARY:

The current WilMEA Collective Bargaining Agreement expires June 30, 2020. The parties initiated bargaining in January but paused the process during the City's initial response to the coronavirus pandemic. Bargaining resumed in May and the bargaining teams agreed to extend the terms and condition of the current contract through June 30, 2021, except for a 1.5% wage increase effective July 1, 2020.

EXPECTED RESULTS:

N/A

TIMELINE:

N/A

CURRENT YEAR BUDGET IMPACTS:

Funds were not budgeted in personnel services in the FY 2020-2021 Budget, but held in contingency because negotiations were underway during the budget process and economic impacts were unknown. With negotiation complete, the finance department will prepare a budget adjustment to be approved by the City Council.

FINANCIAL REVIEW / COMMENT:

Reviewed by: CAR Date: 6/10/2020

A supplemental budget adjustment will be presented to Council in July to increase the personal services line items for each operating program.

LEGAL REVIEW / COMMENT:

Reviewed by: ARGH Date: 6/10/2020

COMMUNITY INVOLVEMENT PROCESS:

N/A

POTENTIAL IMPACTS or BENEFIT TO THE COMMUNITY:

N/A

ALTERNATIVES:

N/A

CITY MANAGER COMMENT:

N/A

ATTACHMENTS:

1. Resolution No. 2826
 - A. Letter of Agreement with Wilsonville Municipal Employee Association

RESOLUTION NO. 2826

A RESOLUTION ADOPTING THE LETTER OF AGREEMENT BETWEEN THE CITY OF WILSONVILLE AND WILSONVILLE MUNICIPAL EMPLOYEE ASSOCIATION.

WHEREAS, the City of Wilsonville and Wilsonville Municipal Employee Association have negotiated a Letter of Agreement to extend the July 1, 2017 through June 30, 2020 Collective Bargaining Agreement through June 30, 2021.

NOW, THEREFORE, THE CITY OF WILSONVILLE RESOLVES AS FOLLOWS:

1. The City Manager is authorized on behalf of the City to execute the negotiated and ratified Letter of Agreement with Wilsonville Municipal Employee Association attached here as Exhibit A as if fully set forth herein.

ADOPTED by the City Council of the City of Wilsonville at a regular meeting thereof this 15th day of June, 2020, and filed with the Wilsonville City Recorder this date.

Tim Knapp, Mayor

ATTEST:

Kimberly Veliz, City Recorder

SUMMARY OF VOTES:

Mayor Knapp
Councilor Akervall
Councilor Lehan
Councilor West
Councilor Linville

Exhibit:

- A. Letter of Agreement with Wilsonville Municipal Employee Association

LETTER OF AGREEMENT

Between

CITY OF WILSONVILLE

and

WILSONVILLE MUNICIPAL EMPLOYEES ASSOCIATION (WiMEa)

The City of Wilsonville (“Employer”) and the Wilsonville Municipal Employees Association (“WiMEa”) hereby agree to extend the current Collective Bargaining Agreement (and any Letters of Agreement) dated July 1, 2017 through and including June 30, 2020, with all terms and conditions remaining in full force and effect, through and including June 30, 2021 with the following exceptions:

Article 12.1: Effective July 1, 2020, wages will be increased by 1.5%

By: _____
Bryan Cosgrove, City Manager
On behalf of the Employer

By: _____
Tommy Reeder, Association President
On behalf of WiMEa

Date: _____

Date: _____



CITY COUNCIL MEETING STAFF REPORT

Meeting Date: June 15, 2020		Subject: Resolution No. 2820 Equitable Housing Strategic Plan	
		Staff Member: Kimberly Rybold, AICP, Senior Planner	
		Department: Community Development	
Action Required		Advisory Board/Commission Recommendation	
<input checked="" type="checkbox"/> Motion <input checked="" type="checkbox"/> Public Hearing Date: June 15, 2020 <input type="checkbox"/> Ordinance 1 st Reading Date: <input type="checkbox"/> Ordinance 2 nd Reading Date: <input checked="" type="checkbox"/> Resolution <input type="checkbox"/> Information or Direction <input type="checkbox"/> Information Only <input type="checkbox"/> Council Direction <input type="checkbox"/> Consent Agenda		<input checked="" type="checkbox"/> Approval <input type="checkbox"/> Denial <input type="checkbox"/> None Forwarded <input type="checkbox"/> Not Applicable	
		Comments: At their May 13 meeting, the Planning Commission unanimously approved a recommendation to City Council to adopt the proposed Equitable Housing Strategic Plan.	
Staff Recommendation: Staff recommends that Council adopt Resolution No. 2820.			
Recommended Language for Motion: I move to approve Resolution No. 2820.			
Project / Issue Relates To:			
<input checked="" type="checkbox"/> Council Goals/Priorities: Housing Affordability Study and Policy Development		<input type="checkbox"/> Adopted Master Plan(s)	<input type="checkbox"/> Not Applicable

ISSUE BEFORE COUNCIL:

Hold a public hearing and consider adoption of the proposed Equitable Housing Strategic Plan.

EXECUTIVE SUMMARY:

In 2016, Wilsonville applied for and received a Metro Community Planning and Development Grant to develop an Equitable Housing Strategic Plan. The primary goal of this project is to identify gaps that are currently present in Wilsonville’s housing market and develop a plan with prioritized strategies to fill these gaps, providing Wilsonville residents and employees housing opportunities for different household compositions, ages, and income ranges. Adoption of the Plan will give the City a framework to guide implementation of these actions with the goal of making housing more affordable and attainable.

Development of the Equitable Housing Strategic Plan (Attachment 1, Exhibit A) was guided by the City Council’s 2017-2019 goal to “Pursue a balanced housing mix with a variety of choices to meet the needs of current and future residents of varying financial levels.” From this broad goal, along with input from the Planning Commission and project task force, the City Council developed seven policy objectives to guide development of the recommended strategic actions included within the Plan.

As a first step to help identify gaps in the City’s housing market, the project team prepared a Housing Market Research Report (Appendix A of Plan) highlighting key factors affecting Wilsonville’s housing market, including changing demographics, increased rental costs, and unit type mix of recent construction. The project team also undertook a variety of stakeholder outreach activities (Appendix B of Plan), including focus groups, interviews, an informational kiosk, and in-person and online surveys, where over 100 people shared perspectives on housing in Wilsonville. This information, coupled with input from the project task force, Planning Commission, and City Council, shaped the actions and overall framework of the Equitable Housing Strategic Plan.

Actions within the Plan are split into two categories – those best suited for implementation to begin in the next two years, and those that will require additional exploration to determine funding and undertake stakeholder outreach. Based on feedback received on the draft Plan from the task force, Planning Commission, and City Council, the project team added considerations for some of the Plan’s actions, including those related to Transit-Oriented Development at the Wilsonville Transit Center (Action 1A), Missing Middle Housing Planning (Action 1B), and Equitable Housing Approaches in New Urban Growth Areas (Action 1C). The project team also included additional implementation considerations for the Actions Requiring Further Exploration, including the addition of an action supporting local repair programs (Action 2G). At its April 6 work session, City Council reaffirmed this framework and the actions within it, noting that all five actions within the near-term Implementation Actions category are important in achieving the overall Council goals for this Plan.

Based on this feedback, and in acknowledgement of the changes in circumstance surrounding the COVID-19 epidemic, the final draft Plan includes the following additional refinements:

- Spotlights to provide historic context about Wilsonville’s housing polices and successes, information about different cost factors for market-rate housing, a discussion on the role of inclusion in creating equitable housing, and quotes from stories shared on *Let’s Talk, Wilsonville!*
- A discussion on the role of this Plan in the context of COVID-19 recovery.

- Additional guidance on funding sources, including a roadmap to evaluate a Construction Excise Tax (a percentage-based fee on new residential or commercial construction charged at the time of permitting), reflecting City Council direction to evaluate this funding mechanism in the next six months to a year (Appendix C in Plan).
- Refinement of the Steps for Implementation chapter to include suggested indicators to measure the progress of the Plan in achieving its policy objectives and a framework for monitoring and prioritizing the Plan's actions over time.

At the May 13 public hearing, the Planning Commission voted unanimously to recommend adoption of the Plan to City Council. During the hearing, the Planning Commission received testimony requesting edits to the Plan's policy objectives to provide further direction to the Plan's actions. Since the City Council finalized the policy objectives in fall 2019, the Planning Commission discussed if this additional clarification was appropriate elsewhere in the Plan, noting that the Plan's actions were created to be responsive to the needs of the populations identified in the market study. Ultimately, the Planning Commission did not recommend any changes to the Plan document, observing that a further discussion of social equity and inclusion extends beyond the adoption of a housing policy strategy. In light of an interest to insure equity and inclusion, both for this Plan's implementation as well as in other City projects and outreach efforts, Planning Commission members expressed a desire for a committee or other City-appointed body to review future City plans, projects, and other City issues, including the implementation of this Plan's actions through the lens of equity and inclusion. In the coming months, the Planning Commission intends to consider a resolution recommending to the City Council such a committee or other body to discuss these issues.

The final draft Equitable Housing Strategic Plan, dated June 15, 2020, includes minor grammatical edits for clarity and consistency in capitalization, hyphenation, sentence structure, and punctuation. Additional clarifying edits are outlined in the attached errata sheet (Attachment 2) and incorporated into the proposed amendments attached to Resolution No. 2820.

EXPECTED RESULTS:

Adoption of the proposed Equitable Housing Strategic Plan.

TIMELINE:

The Planning Commission held the first public hearing on the Equitable Housing Strategic Plan on May 13, 2020. Implementation of the Plan's high priority actions is anticipated to begin within two years.

CURRENT YEAR BUDGET IMPACTS:

The Professional Services Agreement has a budget of \$62,500 included within the CD Fund in the adopted budget, which is funded through a Metro Community Planning and Development grant with a \$10,000 City match. Staff estimates spending approximately \$50,000 of the remaining Professional Services Agreement contract amount during this fiscal year.

FINANCIAL REVIEW / COMMENT:

Reviewed by: CAR Date: 6/3/2020

LEGAL REVIEW / COMMENT:

Reviewed by: ARGH Date: 6/10/2020

COMMUNITY INVOLVEMENT PROCESS:

There have been multiple opportunities for the community to participate in the project. Participation opportunities included an advisory task force, stakeholder interviews, focus groups, and online surveys, in addition to work sessions and public hearings before the Planning Commission and City Council. The project team seeks to provide meaningful stakeholder engagement and worked with stakeholders to make available fair and equitable opportunities to voice needs and opinions for the future of equitable housing development in Wilsonville.

POTENTIAL IMPACTS OR BENEFIT TO THE COMMUNITY:

As a result of this project, the City will have a better understanding of the specific housing gaps that exist within Wilsonville, with a list of policy strategies for the City to pursue aimed at filling these gaps. Pursuit of these strategies will strive to make housing more affordable and attainable for City residents and employees, ensuring Wilsonville provides housing opportunity for different household compositions, ages, and income ranges.

ALTERNATIVES:

The City Council may adopt the Plan as is, with modifications, or continue the hearing for more information or deliberation.

CITY MANAGER COMMENT:

N/A

ATTACHMENTS:

1. Resolution No. 2820
 - A. Equitable Housing Strategic Plan and Appendices
 - B. Planning Commission Record
2. Errata Sheet for Exhibit A of Resolution No. 2820
3. Equitable Housing Strategic Plan Presentation

RESOLUTION NO. 2820

A RESOLUTION OF THE CITY OF WILSONVILLE ADOPTING THE EQUITABLE HOUSING STRATEGIC PLAN.

WHEREAS, in 2016, the City of Wilsonville (“City”) applied for and received a Metro 2040 Planning and Development Grant for the creation of an Equitable Housing Strategic Plan (“Plan”) in response to community concerns about increasing housing costs; and

WHEREAS, in 2017, the City approved an Inter-Governmental Agreement between Metro and the City, which outlined the major milestones, deliverables, and funding conditions for completing the Plan; and

WHEREAS, upon receiving the Metro grant, the City Council identified pursuit of a balanced housing mix with a variety of choices to meet the needs of current and future residents of varying financial levels as a City Council goal for FY 2017-19; and

WHEREAS, community involvement for the Plan began in July 2019 and included an advisory task force, focus groups, interviews, an informational kiosk, and in-person and online surveys, where over 100 people shared perspectives on housing in Wilsonville; and

WHEREAS, a Market Research Report assessed the City’s current housing mix and future demographic trends to inform the Plan’s actions; and

WHEREAS, the results of the Market Research Report and community involvement informed the framework and actions contained in the Plan; and

WHEREAS, the City Council held five work sessions and the Planning Commission held three work sessions regarding the Plan; and

WHEREAS, on May 13, 2020, the Planning Commission of the City, who, under Wilsonville City Code Section 4.032, has the authority to review and make recommendations to the City Council, conducted a public hearing on the Plan, forwarding a unanimous recommendation of approval; and

WHEREAS, a copy of the record of the aforementioned Planning Commission action and recommendation is marked as Exhibit B, attached hereto and incorporated by reference herein; and

WHEREAS, during the Planning Commission’s deliberation of the Plan, Planning Commission members expressed a desire for a committee or other City-appointed body to review, with a lens toward promoting equity and inclusion, future City plans, projects, and other City

issues, and the Planning Commission intends to consider a resolution recommending to the City Council such a committee or other body; and

WHEREAS, City Council, after Public Hearing Notices were provided to a list of interested parties, property owners, and affected agencies, and posted in two locations throughout the City and on the City website, conducted a public hearing on June 15, 2020, affording all interested parties an opportunity to be heard on this subject and has entered all available evidence and testimony into the public record of their proceeding; and

NOW, THEREFORE, THE CITY OF WILSONVILLE RESOLVES AS FOLLOWS:

- Section 1. Findings. The above-recited findings (Exhibit B) are adopted and incorporated by reference herein as findings and conclusions of Resolution No. LP20-0002, which includes the staff report.
- Section 2. Determination. Based on such findings, the Wilsonville City Council hereby adopts the Equitable Housing Strategic Plan as presented at the June 15, 2020 public hearing, attached hereto and incorporated by reference herein as Exhibit A, including the findings and recommendations contained therein.
- Section 3. Effective Date. This resolution is effective upon adoption.

ADOPTED by the Wilsonville City Council at a regular meeting thereof this 15th day of June 2020, and filed with the Wilsonville City Recorder this date.

TIM KNAPP, MAYOR

ATTEST:

Kimberly Veliz, City Recorder

SUMMARY OF VOTES:

Mayor Knapp

Council President Akervall

Councilor Lehan

Councilor West

Councilor Linville

EXHIBITS:

A. Equitable Housing Strategic Plan and Appendices

B. Planning Commission Record

Exhibit A



Wilsonville Equitable Housing Strategic Plan

June 15, 2020

Resolution No. 2820



Acknowledgements

Task Force

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DWFritz Automation
John Cronkite,
Resident
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Costa Pacific Communities
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Taft Mitchell,
Wilsonville Community Sharing, resident
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Northwest Housing Alternatives

City Council

Mayor Tim Knapp
Kristin Akervall, Council President
Charlotte Lehan, Councilor
Ben West, Councilor
Dr. Joann Linville, Councilor

Planning Commission

Kamran Mesbah, Chair
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This project is partially funded by a Metro 2040 Grant.

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1. A Call for Action

Rising housing prices affect every community in the Portland metropolitan region in different ways, and each community is searching for solutions that match their unique challenges.

Wilsonville experiences many of the same challenges as other communities in the region: affordable rental and homeownership options are increasingly out of reach for current residents as well as for those seeking a new life in the community, construction costs are rising, and there is a limited supply of new land.

At the same time, Wilsonville has unique challenges that require targeted solutions. For example, while multifamily housing comprises over half of Wilsonville's housing stock, the supply of low-cost, market-rate housing units is limited. And, while the City is planning for new housing in urban growth areas, there are limited opportunities for near-term new development opportunities in established residential neighborhoods. The City also has no dedicated staff working to promote lower-cost housing options.

In the midst of the regional housing crisis, and as the economic recovery from COVID-19 takes shape, Wilsonville seeks to expand opportunities and access for more people to enjoy the city's quality of life. To address the community's housing needs now and in the future, the City has committed to establishing a roadmap toward a more *equitable* housing system. While housing affordability is a key component of housing equity, providing more rent-restricted affordable housing without also taking other actions will not achieve the full potential of an equitable housing approach.

Equitable housing means that all people are able to find a home that meets their location, price, space requirements, and desired amenities. It requires a strategy that not only accounts for new units and price points, but also other features needed by the people who will occupy them.

With this Strategic Plan (Plan), the City commits to a set of actions that it will begin in the next two years and beyond to move toward more equitable housing outcomes.

The Plan's actions encourage the production of more diverse housing types with access to services, improve partnerships with housing providers, expand homeownership opportunities, and reduce displacement risk for Wilsonville residents.

WHAT IS EQUITABLE HOUSING?

Equitable housing goes beyond simple affordability. It aims to ensure all people have housing choices that are diverse, high quality, physically accessible, and reasonably priced, with access to opportunities, services, and amenities. This broad definition includes choices for homes to buy or rent that are accessible across all ages, abilities, and incomes and convenient to everyday needs, such as transit, schools, childcare, food, and parks.

Equitable housing also represents a system that accounts for the needs of households with low income and communities of color, recognizes a history of housing discrimination, and complies with current state and federal fair housing policy. Source: Metro

WHY NOW?

Residents have expressed concern about being displaced or having to move out of the city in search of more affordable rental and homeownership opportunities. Residents have also expressed an interest in encouraging a broader range of housing types to be built, including more single-level homes with accessibility or adaptability features, accessory dwelling units and entry-level homes.

The City pursued the Metro Equitable Housing Grant in 2016 that funded this work, and established a Council Goal for 2017-2019 as follows: *Pursue a balanced housing mix with a variety of choices to meet the needs of current and future residents of varying financial levels.*

This Strategic Plan documents the plan process, key findings from the outreach and technical analysis, the City’s framework action, and details the list of specific actions the City will take to advance its equitable housing goals.

How Can This Plan Advance Housing Equity?

Access to housing is foundational to family success and helps to achieve broader equity goals. Affordable, stable housing can help families meet their basic needs and build reserves for unforeseen expenses. Providing a diverse set of housing sizes and types can help accommodate the many different households that might wish to locate in Wilsonville in the future. Furthermore, locating those units close to services, transit, parks, civic buildings, and retail opportunities can increase quality of life.

Starting a conversation about equity with an intentional focus on housing can lead to meaningful change toward better outcomes for all Wilsonville residents. Housing equity means that people have housing choices that meet their unique needs without racial and economic disparities. It is a key component of a larger strategy of achieving greater equity.

WHAT IS EQUITY?

There are many working definitions and visions of what an equitable world would look like. One definition, from the Stanford Social Innovation Review, describes equity this way:

“It is about each of us getting what we need to survive or succeed—access to opportunity, networks, resources, and supports—based on where we are and where we want to go.”¹

THE RIPPLE EFFECTS OF AFFORDABLE HOUSING

Housing affordability is an important component of housing equity. Research for Metro’s 2018 Affordable Housing Bond found that access to stable, accessible housing that people can afford contributes to a wide range of equitable outcomes:

- Better outcomes for schoolkids: Studies have shown that children from low-income families earn more as young adults when they spend more of their childhood in an affordable home.²
- Increased access to jobs: A TriMet analysis suggests that high housing costs are playing a role in pushing low-income workers into neighborhoods where there are more dispersed street networks, low population densities, and a lack of safe walking routes.
 - Lower housing cost burdens for people of color: Better access to affordable housing would lead to increased stability for people of color, since they often experience housing cost burden. In the Portland Metro region, 51% of households headed by a person of color pay more than 30% of their income for housing, compared with 46% of households headed by a white person. Fifty-two percent of households with a Latinx householder are cost-burdened.³
- Better quality of life for seniors and people with disabilities: Research shows that low-income seniors who pay less than half of their income on rent have up to \$150 more per month, or \$1,800 more per year, available to spend on health care or other basic necessities than their cost-burdened peers.⁴
 - A more stable economy: Analysis shows that the economy of greater Portland is being held back because of the growing imbalance between housing costs and wages—one estimate predicts this imbalance will result in 50,000 fewer jobs over the next 10 years.⁵ Workforce housing supply is a critical component to Wilsonville’s ability to remain a desirable place to do business. Prospective employers are weighing this factor more heavily than they have in past when making decisions on relocation and expansion.
- Lower medical expenses: A Providence Health study in the Portland region showed that once lower-income families moved into affordable housing, they had fewer emergency room visits and accumulated lower medical expenditures than in the year before they moved in.⁶
- More stable employment: Housing stability affects worker performance. For low-income workers who experienced an eviction or a forced move, the likelihood of being laid off increases between 11 and 22 percentage points, compared to similar workers who were not forced to move.⁷

“For many of our patients, a safe, decent, affordable home is like a vaccine—it literally keeps children healthy.”

-Megan Sandel, M.D., M.P.H. and Deborah Frank, M.D.

The Role of This Plan during COVID-19 Reopening and Recovery: What Changes with Implementation?

This Plan is the first step in a change from business as usual, at a time when change from business as usual is called for. It was completed in May 2020, during the global COVID-19 pandemic and associated stay-at-home orders. Most of the research, outreach, and plan development occurred prior to March 2020, without any expectation of the sudden economic slowdown that would impact Wilsonville (and the world). The timing for re-opening Oregon's economy, the full impacts of stay-at-home orders, and the depth of the accompanying recession will not be known for some time.

"I live in Wilsonville because I was able to get low-income housing here. That has made all the difference. Now my social security payment stretches to cover my monthly expenses instead of just covering rent. I can't say how grateful I am for my housing situation."

- Let's Talk, Wilsonville!
online participant

Prior to the COVID-19-induced economic shock, Wilsonville residents, like people on much of the West Coast, were experiencing a housing crisis. Housing prices were rising faster than incomes, and unit production for both market-rate and affordable units failed to keep up with demand.

While the housing crisis inspired the commitments contained in this document, what is understood right now of the COVID-19 crisis increases the urgency for action to create a more resilient and equitable housing market. Without the recently-enacted emergency eviction moratoriums and unprecedented federal funding for unemployment, some Wilsonville renters might have already lost their homes. While much remains uncertain at this point, it seems possible that the region could see a slowdown in unit production that will exacerbate unit supply shortages at the same time that rising unemployment rates hobble incomes. This "one-two punch" would be disproportionately felt by the lower-income residents and communities of color that most need proactive implementation of this Plan. Without action, the crisis could lead to increased inequity in housing.

Recognizing the complex, interrelated conditions that result in social and economic inequities, and the critical urgency of housing access in this time of economic uncertainty, **this Plan intentionally focuses on a set of housing actions that the City can begin to advance in the two years following the Plan's adoption.** These actions range from identifying site-specific development opportunities, to code-based strategies, to tax abatements.

At the same time, the Plan also identifies a set of actions that have promise but that will require more exploration and definition to advance. These actions include revisiting parking requirements, exploring a land acquisition strategy, and reducing or waiving permit fees. **This structure allows the City to make immediate progress on pressing issues while clarifying its next steps. It recognizes that achieving housing equity will require sustained action over time, and that the City has more to learn as it goes.**

The structure of the strategy — with an explicit focus on actions the City can begin in the next two years — allows the City to make progress while forging new partnerships, learning more about residents' needs, and reshaping fiscal priorities as the COVID crisis evolves.

Commitments to near-term actions will position the City for mid- and longer-term actions that can be better tailored to changing housing needs during the time of economic recovery.

Truly resilient and equitable housing access requires collective action. The City is just one among many players that must engage to achieve the goals in this strategy. Much of what the City needs to learn about housing equity will require careful listening, especially to those who understand housing inequities first-hand. Success will build from ongoing engagement with housing and service providers, regional and state housing funders, and residents—especially Wilsonville’s communities of color, renters, those seeking to become homeowners, and other residents who are experiencing the worst effects of income disparities and the current economic crisis. In the current context, authentic community conversations that expand the collective imagination about equitable outcomes are an even more necessary starting place. Through committing to the actions in this Plan, the City is leading the first step toward long-term equitable housing access for all Wilsonville residents.

2. The Need for Equitable Housing

This Plan draws from many sources to identify priorities, including technical analysis of the housing market, stakeholder interviews, public outreach, and discussions with a project task force, the Planning Commission, and City Council.

Overview of Housing Needs

The project team completed a Housing Market Research Report to document existing and projected future housing conditions. The purpose of this Housing Market Research Report is to synthesize background information on the current housing market to support development of focused actions. In particular, the report focuses on housing affordability issues and identifies the types of housing that the City should plan for in the future. The data source for the following summary is predominantly the United States Census American Community Survey, with additional data from Metro's Regional Land Information System.

This section summarizes the research conducted as part of the Housing Market Research Report, which is included in Appendix A.

Who Lives in Wilsonville Today?

- **Wilsonville has a relatively young population.** Millennials (ages 25 to 40) make up 32% of the population in the city, compared to 24% in Clackamas County. Aging Baby Boomers (ages 60+) make up 20% of the population in the city, compared to 23% in the county. The majority of households are family households.¹
- **Median household income in 2016 was \$105,000 for homeowners and \$50,000 for renters.** The majority (56%) of Wilsonville householders are renters.
- **The Latinx community is expanding quickly.** Between 2000 and 2016, the Latinx population in Wilsonville grew by about 2,000 people, from 6% to 11% of the population. This growth rate was greater than the growth rate of any other population in Wilsonville or the growth rate of Latinx population in the County.

"We have now found that even renting here is something we are no longer able to afford ... I've looked into housing assistance, SNAP/WIC, affordable housing, energy bill assistance, etc., only to be told that we just make a few hundred dollars too much per month to qualify."

- Let's Talk, Wilsonville!
online participant

¹ Per the United States Census, a family is a group of two people or more (one of whom is the householder) related by birth, marriage, or adoption and residing together.

What Will Wilsonville's Future Population Look Like?

- **Wilsonville's population is projected to grow by 14% over 20 years.** About half of the new households are expected to be low income (earning less than 80% of the Area Median Income,² or AMI).
- **Countywide, the share of residents ages 40 to 60 will grow to 28% of the population, and, the share of people over age 60 is expected to stay relatively constant.** While city-level projections are not available, Wilsonville will likely continue to have a large share of older residents.
- **Latinx residents in the metropolitan region will more than double by 2040 because 46% of all new residents are expected to be Latinx.** Again, Wilsonville is expected to be affected by this broader trend.

What Are the Current Housing Conditions in Wilsonville?

- **Wilsonville has an even mix of single-family homes and multifamily homes (including apartments), while a greater proportion of homes in Clackamas County are single-family.** Market trends for multifamily rental housing in Wilsonville mirror those of the Portland region, but a larger share of the city's multifamily housing stock is relatively new and high-quality compared to other communities in the region.
- **Homeownership is out of reach for many residents.** Entry-level homes and most other homes cost much more than what the average household can afford. A median renter household could afford homes valued between \$221,000 and \$252,000 if they had sufficient down payment resources, but the median housing price in Wilsonville was \$454,500 as of February 2019.
- **One in ten Wilsonville households live in the city's 449 subsidized units, most of which are for families and seniors.** However, despite Wilsonville's subsidized housing stock, almost a quarter of all households in the city are housing cost-burdened, meaning they spend more than 30% of their income on housing. Eight out of ten Wilsonville households earning less than \$50,000 per year are cost burdened.

"Right now, there is a large gap in Wilsonville. There are no starter homes, just condos for older, financially stable couples who are downsizing or starter homes for singles or two working professionals with at least one high-paying job."

*- Let's Talk, Wilsonville!
online participant*

² Area Median Income (AMI) is a metric calculated by the U.S. Department of Housing and Urban Development (HUD) to determine the income eligibility requirements of federal housing programs.

Subsidized Housing in Wilsonville

With a strong employment base, good schools, and other community amenities, Wilsonville is considered a high-opportunity area for people to live. Subsidized housing is an important part of the city's housing mix, providing opportunity for people with lower household incomes to have access to stable housing in the city. Subsidized housing exists in Wilsonville in the following ways:

- **Subsidized units:** Wilsonville has seen a substantial amount of subsidized affordable housing development, with a rate of approximately 52 units per 1,000 households. This is about six times the entire Clackamas County average of 8.5 units per 1,000 households.
- **Housing vouchers:** Housing vouchers provide a subsidy for recipients to use to pay for housing on the private market. Wilsonville has fewer people than average using housing vouchers, which may be due to the city's relatively higher rental housing costs or the fact that other communities in the County have established social service networks that help to account for higher number of vouchers per household.

What Types of Housing Will Future Residents Need?

As described in **Appendix A**, future Wilsonville residents will be more diverse in race, ethnicity, and age than current residents. To support them, the City will need to continue to provide a wide range of housing types at a variety of price points. Baby Boomers, Millennials, and Latinx families will be increasingly important groups seeking affordable housing options, but they will have different preferences for unit types and sizes. Attached single-family and multifamily units will likely be the most affordable choices for people seeking less expensive options. The City will need to continue to enable the development of a range of missing middle, cottage cluster, and multifamily developments, and support the inclusion of affordable family-sized units.

Key growth areas are the Frog Pond and Town Center planning areas. Most future housing needs can be met by the new homes built in these areas, if the City can encourage a variety of housing types at a range of price points. For an overview of future households in Wilsonville by family income, see page 7 of **Appendix A**. Exhibit 1 provides an overview of key takeaways for future housing, based on the housing market research report.

Exhibit 1. Key Future Housing Trends in Wilsonville (2020-2040)

Future Demographic Shift	What does this mean for future housing types?
More middle-aged Millennials	<ul style="list-style-type: none"> • Homeownership for Millennials will increase • Demand for relatively affordable ownership and rental types near amenities
Constant Number of people age 60+	<ul style="list-style-type: none"> • Downsizing • Aging in place and multigenerational households • Homes close to services
Increasing share of Latinx households	<ul style="list-style-type: none"> • Larger units to accommodate larger, multigenerational households • Relatively affordable housing

SPOTLIGHT: A MIXED-INCOME, MIDDLE HOUSING APPROACH IN VILLEBOIS

Villebois is an example of Wilsonville’s experience in helping to shape equitable outcomes in a neighborhood. In 1999, Senate Bill 686 authorized the State of Oregon to sell the Dammasch State Hospital site for development. The legislation required up to ten acres be set aside for community housing for individuals with chronic mental illness. In addition, the legislature designated the bulk of the sale proceeds to be put in a Community Mental Health Housing Fund to be used to leverage partners and provide housing units to serve those with chronic mental illness.

The Villebois Village Master Plan identifies 13 housing types for a variety of income levels and household compositions. One of the three guiding design principles of the Villebois Village Master Plan is Diversity, including housing options. Almost fully built out, Villebois now includes a mix of market-rate and subsidized affordable housing, including housing with supportive services for mental health, as part of the overall Master Plan for the community. In addition, the area includes a variety of middle housing types, including townhomes, carriage houses, and multiplexes. By integrating subsidized housing into market rate development, Villebois encourages greater community stability, safety, and access to opportunity for vulnerable populations.



Stakeholder and Public Engagement

The project team conducted stakeholder and public engagement to understand housing challenges and possible solutions. The team conducted a process that included:

- One-on-one interviews with 10 key stakeholders. Participants included community-based organizations, real estate and building professionals, and employers. Some of these organizations currently address the needs of underrepresented groups in Wilsonville.
- A survey of 15 community members who rent units in existing subsidized buildings.
- An online survey on *Let’s Talk, Wilsonville!* with 80 participants.
- Three focus groups with nonprofit affordable housing developers, local employers, and community-based organizations that serve Wilsonville residents, including underrepresented populations.

An in-depth review of findings from the project’s stakeholder and public engagement process is included in Appendix B.

- A kiosk at the Wilsonville Public Library that was available during December 2019 and featured an interactive poll available in English and Spanish.
- A survey of employers with nine responses.

A few, high-level themes surfaced that helped shape the plan, summarized below:

- **Many people are paying more than they can afford for rental housing in the city.** Wilsonville’s rental market is bifurcated. There is subsidized rental housing for lower income households. There are also newer, more expensive market-rate developments, but little else in the middle. While stakeholders recognized that Wilsonville has a large share of multifamily units, the city lacks older, market-rate rental housing that depreciates over time. The result is that the city’s rental market is perceived as being more similar to Lake Oswego and West Linn than to Milwaukie or Oregon City.
- **Affordable homeownership is a key challenge.** Based on conversations with service providers and community stakeholders, the biggest challenge to homeownership that renters identified was finding a home that they could afford, especially for middle-income families (making 80% to 120% of the AMI), single-parent families, and people of color. For existing homeowners, there is ongoing concern about homeowners association (HOA) fees and property taxes driving up housing costs for themselves and future residents. There are some resources to support existing homeowners, like home repair programs, but demand for support may be larger than the individual programs can address on their own.
- **There is a need for housing for people with mobility needs.** A key theme in the outreach was the need for single-level homes.
- **There is a perception that there is little land for infill housing development and some opportunities for the City to explore in new planning areas.** Those opportunities include (1) encouraging new housing types (like homes with accessory dwelling units (ADUs) in new residential neighborhoods) with incentives (e.g., tax abatements) and (2) an easier/clearer path for small and medium infill development. Developers also identified tools to support housing affordability that other communities have, but Wilsonville lacks.
- **Wilsonville has a strong and positive history of working with affordable housing developers.** The City’s active support is both valued and seen as being essential for future development to occur. Because of this positive relationship, nonprofit housing

“As a city, we need to refocus our determination to build an inclusive community and one with a large variety of housing types including housing for all people who work here, and I don't just mean the high-tech firms, I'm including retail and service workers. By building a complete community that respects all the workers and residents we can reduce traffic by reducing the need to commute in and out of the city.”

*- Let's Talk, Wilsonville!
online participant*

providers are willing and eager to consult with the City early on and lend their development knowledge and expertise to planning efforts.

The team communicated the issues identified through the technical analysis and stakeholder engagement process to the task force, Planning Commission, and City Council to develop the action framework and implementation actions, detailed in the following sections.

SPOTLIGHT: EQUITY AND INCLUSION

Throughout the project, stakeholders emphasized the importance of equity and inclusion as a priority for the City, in a housing context and in more general terms as well. They provided examples of the need for better social connections and to make Wilsonville a more welcoming place for people with different backgrounds. Stakeholders discussed the need to distribute equitable housing throughout the city to provide access to services and employment. They also generated ideas for how to make Wilsonville a more inclusive place, including linking housing with economic development, diversifying board representation, and convening community-based organizations to identify solutions. The Planning Commission had lengthy discussions about the need to enhance the City's culture of inclusion. They emphasized the need to create an environment in which people of different cultures and backgrounds feel welcome. This could help community members build social resilience and better weather a crisis.

While not the emphasis of this housing-focused Plan, these issues and ideas are a starting place for a more comprehensive approach to an equitable future for the city. These insights informed the overall planning process and the priorities included in this plan, and also are fruitful feedback for future equity-planning initiatives.

Appendix B provides a more detailed summary of key themes and ideas.

3. Framework for Action

The outcome of the market analysis and public outreach described in Section 2 resulted in an understanding of issues related to equitable housing, including affordability gaps and housing needs for specific populations. This section establishes an implementation framework for the plan, including a set of policy objectives, partners, and funding options.

Policy Objectives

As the City pursued the Metro Equitable Housing Grant in 2016 that funded this work, City Council also established a goal related to housing as part of its goal setting process for 2017 to 2019. To guide development of the Plan, Council developed a set of policy objectives. These objectives drew from adopted policies and priorities, stakeholder input, and feedback from the Planning Commission and Equitable Housing Task Force. These objectives set the course for the City's actions to improve equitable access to a range of housing in Wilsonville and address the identified needs within the city:

1. Greater availability of a diversity of housing types for a full range of price points to serve the community.
2. Increased partnerships with nonprofit and for-profit housing developers.
3. New and expanded affordable homeownership opportunities, especially for first-time homebuyers.
4. Reduced risk of housing displacement.
5. Targeted housing opportunities in areas with access to services and public transit.
6. Maintenance and expansion of quality subsidized affordable housing stock.
7. Implementation of all housing policies through a lens of social equity and inclusion.

*Equitable Housing
Council Goal
for 2017-2019:*

Pursue a balanced housing mix with a variety of choices to meet the needs of current and future residents of varying financial levels.

Funding Sources

One of the key limitations to implementing the actions in this Plan is the availability of funding. Funding is needed not only to build units, preserve affordable housing, and provide access to equitable housing, but also to cover staff time to implement the Plan. Identifying a set of realistic funding sources will be necessary for achieving the vision of equitable housing in Wilsonville.

Locally-Controlled Funding Sources

Beyond the funding tools available at the state and regional levels, the City will need to explore a range of locally controlled funding options to generate additional resources for affordable housing development and associated programs.

- Additional **General Fund Revenue** can support equitable housing preservation and development programs in the Wilsonville. General fund dollars are generally in short supply; housing projects and programs must compete with other key City services for funding. However, as a source of one-time funds for important projects, to support outreach efforts and fund staff time, or for other smaller-scale funding needs, the general fund can be a critical contributor to a comprehensive equitable housing implementation.

SPOTLIGHT: WILSONVILLE'S MOBILE HOME PARK CLOSURE ORDINANCE

In 2007, the Thunderbird Mobile Home Park closed, evicting 160 mostly low-income, senior residents. This sudden event spurred the City of Wilsonville to adopt a mobile home park ordinance that required any owner of a manufactured home park to provide adequate notice of a park closure, a plan for where the park tenants could move their homes and a payment toward moving expenses. This decision helps to preserve affordable housing and lessen the resulting losses for homeowners when a park is closed. It also resulted in the City's partnership with Northwest Housing Alternatives to build Creekside Woods Senior Apartments, a low-income, senior housing development.



Source: Metro

- A **Construction Excise Tax**³ (CET) consistent with recent changes to state law can generate funding for housing development incentives and programs in Wilsonville. Many communities around Oregon are in the process of exploring the application of CET for housing projects. The City should explore implementation of a CET in the near-term, including assessing potential revenue generation (using 10 to 15 years of past development activity as a case study), studying impacts on development activity and business recruitment, outlining funding objectives needed to advance the equitable housing strategy, and coordinating the process for CET adoption by ordinance. To support future Council conversations, **Appendix C** provides a roadmap to implementation of a CET with key considerations on program details and policy choices.
- **Tax Increment Financing (TIF) Revenue** from Wilsonville’s urban renewal areas (as applicable). TIF (also commonly referred to as urban renewal) is a financing tool for local governments to use property taxes generated from new development in a specific area to fund capital improvements in that same area. The state’s statutes, Oregon Revised Statutes Chapter 457, allow for TIF to fund the development of affordable housing, mixed-use housing, housing that meets other public goals, and / or infrastructure. Some communities choose to include funding for affordable housing as a project in their urban renewal area plans; some have even used their urban renewal plans to identify a portion of all TIF dollars that should be used for affordable housing. Wilsonville should review its current TIF districts to determine if there is potential project funding available for housing development (that would comply with the district plan) and the legal capacity for the City to expand or establish new TIF districts that could include allowances for housing assistance.

Partner Funding Sources

Funding sources available at the regional and state levels can be used to fund several projects and programs, such as new construction of subsidized units, renter supports, weatherization programs, and home ownership support programs. These partner funds will be an important part of how the City will advance its equitable housing priorities. As such, the City should seek to develop closer ties with its regional and state partners, track funding cycles, and understand gaps in funding availability.

- **Clackamas County**, through its Department of Health Housing and Human Services (H3S), manages a wide array of federal, state and local resources for housing and social services that are available in Wilsonville. For example, the Community Development Department administers federal Community Development Block Grant and HOME funds that represent potential funding sources for housing development and rehabilitation programs. The Housing Authority of Clackamas County administers

³ A CET is a percentage-based fee on new residential or commercial construction charged at the time of permitting. In 2016, the Oregon Legislature passed Senate Bill 1533 which permits cities to adopt a CET on the value of new construction projects to raise funds for affordable housing projects. If adopted, the tax would be 1% of the permit value on residential construction and at an uncapped rate on commercial and industrial construction.

housing vouchers that help lower-income households afford rental housing. One way to capture these and other housing and human services resources is through collaboration with affordable housing providers and Clackamas County.

- **Metro’s General Obligation Bond** will fund regional affordable housing development through a new region-wide property tax. In the near term, this source creates the most likely opportunity for funding construction of new affordable housing units or rehabilitation of existing units in the city. The Housing Authority of Clackamas County is responsible for creating and administering the countywide Local Implementation Strategy for deploying these funds. One of the key actions in the coming year is to work more closely with Clackamas County to determine which properties and projects in Wilsonville are eligible for these resources. In addition, **Metro’s TOD Program** provides support to create public-private partnerships that produce transit-oriented development projects, which would complement City’s potential land acquisition activities.
- The **State of Oregon** can serve as a partner in several ways.
 - **Oregon Housing and Community Services (OHCS)** funds low-interest loan programs, grants, and tax credits for affordable multifamily rental housing developments through its Multifamily Housing Finance Section (“Section”). The Section works with local jurisdictions and affordable housing developers to provide financing packages to carry out the department’s mission to develop and preserve affordable housing, linked with appropriate services, throughout Oregon. In addition, OHCS has a variety of programs that support tenants, including home weatherization and emergency rent supports. One way to better access these resources for Wilsonville is through partnering with affordable housing providers and Clackamas County.
 - In 2019, the Oregon Legislature passed two bills that support housing development in urban areas – referred to as House Bills 2001 and 2003 (HB 2001 and HB 2003). The new laws seek to expand housing choice in cities across the state by requiring cities within the Metro area to allow duplexes on lands zoned for single dwellings and to develop new methodologies for calculating the amount of land and types of housing needed to meet growth expectations. To support local government efforts in implementing HB 2001 and HB 2003, the Legislature appropriated \$4.5 million to **the Department of Land Conservation and Development (DLCD)** for technical assistance grants. In early 2020, Wilsonville applied for a grant from DLCD through this program, which would support a portion of the work outlined in one of this Plan’s implementation actions.
- Many **private organizations** in the region provide services and housing that can support a more equitable community in Wilsonville. Partnerships with these organizations will be necessary to secure and create equitable housing as envisioned in this strategy. These partners have their own sources of funding that can be matched to one another and to public sources noted above. Funding partnerships for equitable housing could include

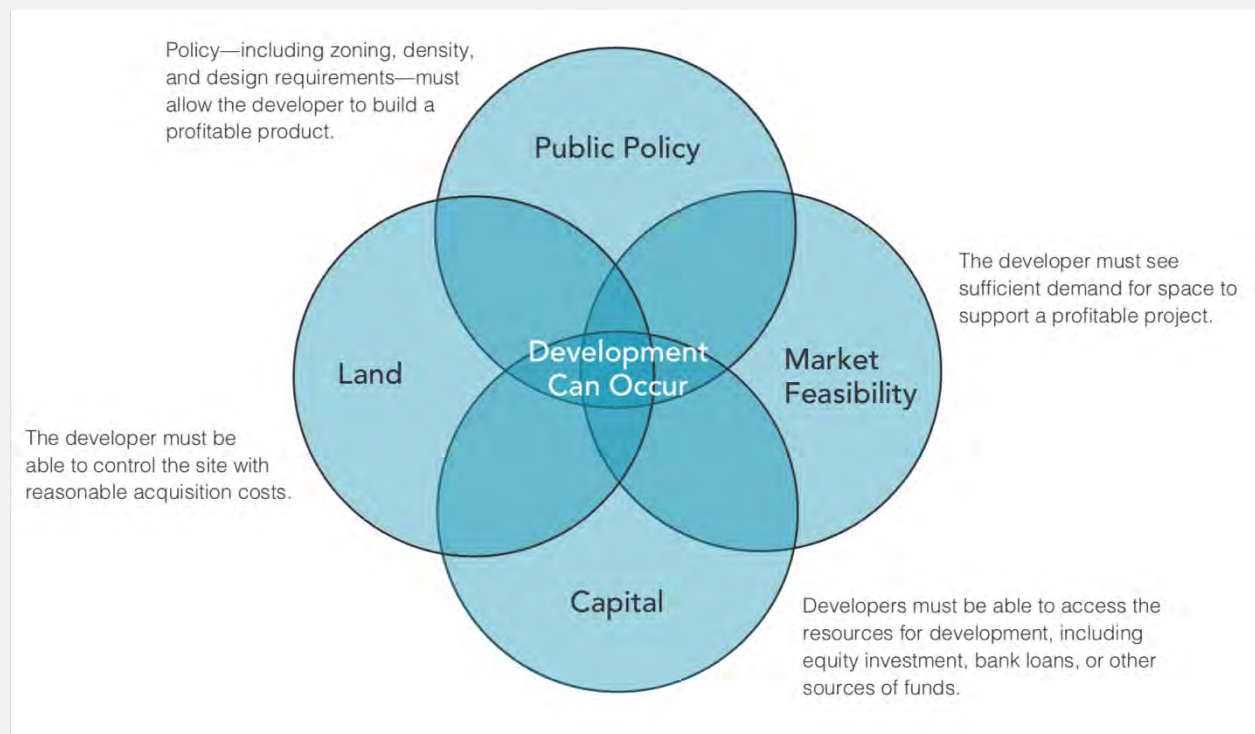
public/private development agreements, foundation grants, down payment assistance, rent assistance, land trusts, transportation or in-home care for disabled and elderly residents, and employer-based housing assistance.

Partnerships

An effective strategy will require ongoing outreach, support, and coordination with organizations in the community to maximize the impact of the City's actions. While these partners may not be able to offer direct funding, they can provide information and support for the City's actions. For example, the City's community-based organizations are already serving community members with diverse needs, and the City can work with them to understand up-to-date conditions in the community. Other partners include local and regional foundations (e.g., Oregon Community Foundation, Meyer Memorial Trust), community-based organizations (including Heart of the City and Wilsonville Community Sharing), large employers, the West Linn-Wilsonville School District, and Habitat for Humanity.

FOUR NECESSARY FACTORS ALLOW NEW MARKET-RATE HOUSING

Understanding how market-rate development occurs is critical for understanding how housing policies and development incentives can be structured to work with the market to increase the supply of market-rate housing. The graphic below illustrates how four factors must intersect so that development can occur.



4. Equitable Housing Actions

Community stakeholders and market research provided insights to the greatest needs and opportunities for equitable housing in Wilsonville. Throughout the process, the City asked its leaders and partners: **What are the actions we can take in the next few years to address these needs?**

This Plan identifies a set of **implementation actions** that can be initiated in the two years after Plan adoption and completed in the short term. The actions in this section arose as the best opportunities for responding to immediate needs while also establishing a system for the City to continue its work for the long term.

The Council also identified a set of **actions requiring further exploration** that necessitate additional research and community discussions and were not prioritized for immediate implementation. These actions may be considered again in the future as more equitable housing is achieved and new needs arise.

Over the course of four meetings, Wilsonville City Council narrowed its list of potential actions to a discrete list of implementation actions that have been prioritized for near-term implementation. The project team also vetted the possible implementation actions with the Task Force and Planning Commission.

Please refer to *Appendix D* for a complete list of actions considered in the process.

Exhibit 2. Overview of Equitable Housing Actions

1. Implementation Actions <i>High-priority actions the City plans to initiate within two years of strategic Plan adoption.</i>	2. Actions Requiring Further Exploration <i>High-priority actions that require further research and community discussions for the City to determine how or if it will pursue in the near term.</i>
1A: Explore Implementation of Transit-Oriented Development (TOD) at City-owned Wilsonville Transit Center Property 1B: Incorporate Equitable Housing Needs into Middle Housing Planning 1C: Define Equitable Housing Approaches in New Urban Growth Areas 1D: Create Housing Tax Abatement Programs to Achieve Housing Diversity and Affordability 1E: Facilitate Connections to Partners and Housing Resources Through City Liaison	2A: Secure Land for Development of Affordable and Equitable Housing 2B: Modify Parking Requirements, Which May Reduce Housing Costs 2C: Explore Tactics to Reduce the Impact of Systems Development Charges on Affordable Housing 2D: Partner with Community Land Trusts 2E: Explore Homeownership Support Programs 2F: Explore Housing Preservation Tax Abatement 2G: Support Local Home Repair Programs 2H: Assess Accessibility and Visitability Standards or Incentives

The actions in the Plan correspond to the seven policy objectives detailed on page 12, which were developed by City Council at the start of the project in summer 2019. These objectives drew from adopted policies and priorities, stakeholder input, and feedback from the Planning Commission and Equitable Housing Task Force.

These objectives provide guidance to the City as it tracks progress on Plan implementation. Exhibit 3 cross-references the Plan’s policy objectives and actions.

Exhibit 3. Actions by Policy Objective

		1. Diverse Housing Types	2. Partnerships	3. Homeownership	4. Reduced Displacement	5. Accessible Locations	6. Expand Subsidized Housing Stock	7. Social Equity
1A	Explore Implementation of Transit-Oriented Development (TOD) at City-owned Wilsonville Transit Center Property	■	■			■	■	■
1B	Incorporate Equitable Housing Needs into Middle Housing Planning	■		■		■		■
1C	Define Equitable Housing Approaches in New Urban Growth Areas	■	■			■	■	■
1D	Create Housing Tax Abatement Programs to Achieve Housing Diversity and Affordability	■	■			■		
1E	Facilitate Connections to Partners and Housing Resources through City Liaison		■	■	■			■
2A	Secure Land for Development of Affordable and Equitable Housing		■	■		■		■
2B	Modify Parking Requirements, Which May Reduce Housing Costs	■	■			■		
2C	Explore Tactics to Reduce the Impact of Systems Development Charges on Affordable Housing		■				■	
2D	Partner with Community Land Trusts		■	■			■	■
2E	Explore Homeownership Support Programs			■	■			■
2F	Explore Housing Preservation Tax Abatement		■		■			■
2G	Support Local Home Repair Programs			■	■			■
2H	Assess Accessibility and Visitability Standards or Incentives	■						■

The following section details the five, key actions for the first year after adoption of the Strategic Plan, providing information about why the action is important and what stakeholders said about the action. It also includes an order-of-magnitude assessment of each action’s potential impact (a qualitative assessment of people served or units developed) and administrative requirement, referencing the following key.

Key:	Potential Impact	Administrative Requirements
◆◆◆	High	◆◆◆ Relatively low administrative requirements, mostly policy setup
◆◆	Medium	◆◆ Moderate administrative effort
◆	Low	◆ Substantial staff time and program setup required

1A: Explore Implementation of Transit-Oriented Development (TOD) at City-owned Wilsonville Transit Center Property

Summary

The City-owned property at the Wilsonville Transit Center is the City’s main opportunity to promote TOD with affordable and/or workforce housing. Potential support could include development/permitting incentives or a public-private partnership that would provide development or infrastructure subsidies in exchange for fulfillment of community goals. The parking lot adjacent to the development site currently has 399 spaces. Many of those spaces are not utilized during the day and overnight parking is permitted but rare, so one opportunity in the development program is the ability to share parking between the park and ride and the development.

The City is interested in completing a Development Opportunities Study and Prospectus to understand development possibilities and constraints, clarify objectives for site development, and compile materials that the City can use as it conducts outreach with potential developers.



Source: City of Wilsonville

Rationale

The Wilsonville Transit Center is one of the City’s limited opportunities to provide true transit-oriented development within the community. Given City ownership of the site, it is also an opportunity to provide affordable housing through land write downs for nonprofit affordable housing development.

Policy Objectives

1 (Diversity of Unit Types), 2 (Partnerships), 5 (Accessible Locations), 6 (Expand Subsidized Housing Stock), 7 (Social Equity)

Summary of Stakeholder Feedback	This is a near-term opportunity with a potential high impact. Affordable housing developers are interested in exploring this opportunity. The Planning Commission and Task Force were supportive, but expressed concerns about the lack of parks and open spaces near the site to support families. In addition, the site is not well connected to the multimodal transportation network. More work would be needed to clarify target demographics that would be appropriate at the site.
Potential Impact	◆◆◆ Control of land is one of the key sources of local government leverage for housing development. The Wilsonville Transit Center property presents an opportunity for transit-oriented affordable housing, especially given the existing parking that could be available to serve housing units.
Administrative Effort	◆◆ Requires development of partnership agreement with developer
Applicable Geographies	Single site
Partners	Nonprofit developers, Tri-Met, State of Oregon, Metro, Clackamas County
Potential Funding Sources	Land write-down, Metro Bond, Federal Transit Administration (FTA) funding, Metro TOD Grant Program. If the City is interested in pursuing Metro Affordable Housing Bond funding for this project, any technical work will need to be expedited to match up to the release of bond funds through the second Notice of Funding Available through the Housing Authority of Clackamas County (expected in 2022).
Next Steps	<p>1. Complete Development Opportunities Study (DOS)</p> <p>The DOS will explore the following questions:</p> <ul style="list-style-type: none"> • What are Council’s goals for site’s development? How can the City balance its financial goals, housing goals, and livability goals (access to open space, multimodal transportation, etc.)? • What are the market conditions for development at this site? • What are the constraints for the site, including any considerations related to environmental features, transportation impacts, access to open spaces, utility connections, etc.? • Given limited parks and recreational space near the site, what population could the site best serve? What mix of unit types best meets that population’s needs? • How many housing units could the site accommodate under existing zoning? • How can the City best position the site for Metro Bond funding? Does that include confirming desired income tiers and unit types (e.g., two-bedroom units) that conform with the Clackamas County Housing Authority’s Local Implementation Strategy for the site? • Given current market conditions and the site's context, should the development program include ground-floor retail? • Would having one residential site near the WES station lead to other property owners being interested in redevelopment of their sites as residential? What are some opportunities? • What disposition alternatives should the City explore?

2. Outreach with Developers

The outcome of the DOS exercise will be a site prospectus that will provide potential development partners and funders with information about the site and the City's objectives for development. The City should consider convening a mix of affordable housing developers and for-profit developers to (1) help understand opportunities and barriers and (2) build interest.

3. Research Funding Options

Questions regarding funding include:

- What are possible funding sources for development, including regional, state, and federal sources?
- What is the Housing Authority looking for in potential bond-funded projects? The next round of funding for the Metro bond will likely be in 2022, which gives the City time to complete due diligence and reach out to partners. In tandem with conversations with developers, Wilsonville staff should reach out to the Housing Authority to discuss their evaluation criteria, potential complementary tools, and potential funding options.
- What can the City do to make this site more attractive for those funding sources?

4. Solicitation Process

The final near-term implementation step will be to define a process for soliciting interest from affordable housing developers.

- Determine funding resources or incentives that could be applied.
 - Refine Council goals for the site, based on feedback from outreach.
 - Market and Release RFP for the site. The RFP should include information on the following: the site's development context (environmental, infrastructure, zoning, etc.), potential advantages, market analysis results to date, development objectives, potential partnership and public investment details, and the submission and evaluation process.
-

1B: Incorporate Equitable Housing Needs in Middle Housing Planning

Summary

Oregon HB 2001 requires that local jurisdictions adopt zoning code regulations or comprehensive plan amendments to permit middle housing types in all areas that are zoned for residential use and allow for detached single-family dwellings. Middle Housing is considered “missing” because many cities’ zoning codes disallowed this type of housing in the postwar period. Middle housing encompasses housing types that fall between single-family development and larger, multiunit apartment buildings, such as duplexes, triplexes, and townhomes.

These changes will allow a diversity of unit types throughout Wilsonville, but the City will need to assess its own plans for future planning areas for Frog Pond as well as the restrictions in each of its existing neighborhoods. The City could explore implementation actions beyond HB 2001’s requirements, such as code changes to encourage accessibility or design options to promote affordability.

Wilsonville’s unique circumstances require a creative approach to implementing the HB 2001 requirements. Most of the City’s established neighborhoods are in planned unit developments, and a majority of planned housing units are located in large master plan areas with a variety of housing types. The City of Wilsonville is spearheading a project that will ensure that tools are in place to support the development of a range of housing types. As part of this project, the City will complete the following activities:

1. **Public outreach and education:** public events, a public engagement website, and a memo for duplex and middle housing design based on community inputs.
2. **Updating plans and codes:** review of density limits and other codes, revision of Frog Pond West master plan, and updated zoning code amendments. This will include an analysis of how zoning code requirements may affect the affordability of housing.
3. **Developing architectural standards:** research of architectural standards and architectural renderings.
4. **Reviewing and updating infrastructure plans:** projection of infrastructure needs, revision of Frog Pond West infrastructure plan, and citywide infrastructure update recommendations.
5. **Funding infrastructure:** analysis of various public service charge and permitting process options.

This action will intersect with **Action 1C**, which includes approaches for equitable development in newly master planned areas.

Rationale	The City will explore design standards and incentives to further expand the housing variety in Wilsonville. Not all residential communities have explicitly considered housing variety in previous planning efforts. Now there is an opportunity to address equitable housing concerns related to HB 2001.
Policy Objectives	1 (Diversity of Unit Types), 3 (Homeownership), 5 (Accessible Locations), 7 (Social Equity)

Summary of Stakeholder Feedback	There is interest in a broader variety of housing types, including starter homes and middle housing types, but the ability to incorporate those housing types into existing neighborhoods requires further study.
Potential Impact	◆◆ Changes are expected to happen incrementally. Some neighborhoods will likely see more of a diversity of development proposals than other neighborhoods, depending on building age, location, and other factors. When combined with financial incentives, these changes could have a greater impact on development feasibility for middle housing types.
Administrative Effort	◆◆ The City will explore potential amendments to the Development Code through a public process, adopt any Development Code changes that emerge from that process, and then review proposals through the existing development review process.
Applicable Geographies	Citywide, with a focus on Frog Pond
Partners	DLCD, Metro
Potential Funding Sources	DLCD grant, other regional funding sources, General Fund
Next Steps	<ul style="list-style-type: none"> • Understand state rulemaking around HB 2001 and implications for current master plans. • Assess to what degree the statewide requirements affect an area that has a master plan. • Identify regulatory barriers to duplex and middle housing development and needed updates for regulatory compliance. • Discuss possible financial, design, or other regulatory incentives for missing middle housing, and whether to target to specific geographies. Prior to the passage of HB 2001, other communities have used the following approaches to encourage middle housing outside: <ul style="list-style-type: none"> ○ Incentives for internal conversations, including alternative paths to code compliance, implementing exemptions to SDCs for internal conversions, reductions or waivers of off-street parking requirements. ○ Zoning code and regulatory approaches that incent middle housing development, such as modifications to development and design standards in the base zone, density bonus options, the creation of new zoning designations, or the implementation of an overlay zone. ○ Financial incentives, such as a middle housing property tax abatement or SDC waivers. • Resources to start with include: <ul style="list-style-type: none"> ○ Making Room: Housing for a Changing America. 2018. AARP. https://www.aarp.org/makingroom ○ Sightline Institute's research on affordable housing incentives and attitudes. https://www.sightline.org/

1C: Define Equitable Housing Approaches in New Urban Growth Areas

Summary	As part of the master planning requirements for Frog Pond East and South, the City will establish goals or targets for accessibility to services/amenities, unit types, and unit affordability levels. The targets for affordability levels (number of units and depth of affordability for those units) should be reasonably achievable, allowing for sufficient market-rate development to support key infrastructure investments. This approach will provide a methodology and framework that can be applied in other growth areas beyond Frog Pond.
Rationale	Integrating housing units for low-income and subsidized housing residents into market-rate development buildings and neighborhoods can encourage greater community stability, safety, and access to opportunity for vulnerable populations.
Policy Objectives	1 (Diversity of Unit Types), 2 (Partnerships), 5 (Accessible Locations), 6 (Expand Subsidized Housing Stock), 7 (Social Equity)
Summary of Stakeholder Feedback	The City has already developed broad goals for housing types in the Frog Pond Area Plan. Developing additional policies for affordability may require additional technical analysis.
Potential Impact	◆◆ By establishing targets ahead of master planning efforts, the City can work with stakeholders to achieve those targets.
Administrative Effort	◆ Requires staff time and stakeholder engagement to establish goals/targets.
Applicable Geographies	Frog Pond East and South, other future urban growth areas
Partners	Metro, affordable and market-rate housing developers
Potential Funding Sources	N/A
Next Steps	<p>At Start of Master Planning Process: Develop policy guidance to guide master planning. The City can consider the following:</p> <ul style="list-style-type: none"> • Determine the range of units affected by a potential affordability target policy, including rent-restricted units, ownership units, accessory dwelling units, and units by size. • Determine a range for depth of affordability for those units. • Provide guidance on how the City should further refine these policies, including stakeholder engagement with property owners, developers, renters, communities of color, and potential funders and composition of any oversight or advisory committees. • Understand community design implications, including providing a specific focus on maintaining access to amenities for affordable units and integrating those units into the overall master plan design. <p>During Master Planning Process:</p> <ul style="list-style-type: none"> • Define policies: Identify the City's targets for affordability levels and number of units that meet those affordability levels in the master plan

area. The target should be provided in a range to allow flexibility to be responsive to changing market dynamics, funding sources, and partner interests.

- Identify specific properties that could play a role in achieving the Master Plan targets.
 - Explore how the affordability targets interact with the Master Plan and use mix, the location of amenities, infrastructure provision, and the implementation and funding plan.
 - Determine potential changes to impact fee assessments and conduct infrastructure funding analysis.
 - Directly engage nonprofit and for profit affordable housing developers.
-

1D: Create Housing Tax Abatement Programs to Achieve Housing Diversity and Affordability

Summary

Communities can support housing production and encourage preservation of housing affordability by providing a partial property tax exemption on increased property value for qualified developments.

The City will analyze the available options to determine which are most appropriate to and viable in Wilsonville. Through a multifamily tax exemption, a jurisdiction can incent diverse housing options in urban centers lacking in housing choices or workforce housing units. There are several additional abatement programs authorized at the state level that the City could evaluate. Each targets a slightly different type of market rate and/or affordable housing unit. Potential programs include:

Vertical Housing Development Zones (VHDZ):

While ground floor retail is desirable in high-density, amenity-rich areas, the additional expense and regulatory requirements that result often make projects infeasible. Providing ground floor retail can help to increase access to services and amenities in a neighborhood. VHDZ incents multi-story, mixed-use development by offering a partial property tax exemption for 10 years to developments that include housing as well as non-residential use (e.g., retail on the ground floor), with a larger tax exemption for higher density developments. A tax exemption can help to increase development feasibility for projects that might not otherwise pencil. *Key Takeaway: This program could be useful in specific, geographically-limited areas like Villebois and Town Center.*

Multiple Unit Property Tax Exemption (MUPTE, sometimes called MULTE):

A flexible program that can be used to incent multifamily housing with particular features or at particular price points by offering qualifying developments a partial property tax exemption for 10 years. Though the state enables the programs, 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, and program cap. An important implementation consideration is the need to monitor compliance over the course of the abatement. The City could implement one or more of the following program types:

- **Encouraging middle-housing rental development** by establishing a program that would be available for small-scale development, such as duplexes, cottage cluster housing, and other unit types. The City would establish eligibility criteria related to tenure, number of units on site, and unit size but would not require detailed income reporting. Such a program could be administered on a per-unit basis, which would allow small-scale developers and property owners to access it, but could increase the City's level of effort for administration.
- **Supporting rent-regulated, affordable projects** that are not eligible for the City's existing nonprofit exemption (e.g., projects developed by for-profit developers) but still have monitoring required by state or federal funds.

- **Supporting workforce housing projects.** The City could offer a citywide program for housing that is affordable to households making up to some specific income level (e.g., 80% or 100% of AMI). If the affordability threshold is relatively close to current market rents, the City could limit the rent the developer could charge but not require income certification for tenants.
- **Preserving the affordability of existing housing** (see Action 2F). A program focused on housing preservation would help maintain Wilsonville's limited supply of low-cost, market-rate housing units and ensure that they remain affordable over time. Such an abatement program would decrease displacement risk, and would help to address the City's social equity objective (Objective 7).

Key Takeaway: A citywide program with multiple uses would likely be the most effective program in encouraging affordable housing at multiple scales.

Low-Income Rental Housing Exemption:

This program provides a 20-year, renewable property tax exemption for rental housing for low-income households (60% of AMI and below). Housing need not be owned or operated by a nonprofit entity; if it is not, only housing built after the program is adopted is eligible. The exemption is limited to adopting jurisdiction's taxes unless there is sufficient support from overlapping taxing districts. It requires that savings be passed on to tenants through rent reductions. *Key Takeaway: Because the full savings must be passed through to residents, the exemption does not provide a sufficient incentive to encourage new housing production by improving feasibility or reducing costs for the developer.*

Nonprofit Low-Income Rental Housing Exemption:

This program provides a simplified way for affordable housing owned and operated by a nonprofit to qualify for a property tax exemption. *Key Takeaway: The City already provides an abatement to nonprofit affordable housing developers.*

Temporary exemption for newly rehabilitated or constructed multiunit rental housing:

This program incents development or rehabilitation of multifamily rental housing with rents affordable to households with an annual income at or below 120% of AMI citywide through a full property tax abatement for no more than 10 years. The program is most useful when a city is interested in encouraging all multifamily development, even above the median income. *Key Takeaway: Given the City's interest in prioritizing affordable development, the MUPTE program is a more suitable program unless the City is interested in providing an abatement to almost any new multifamily housing development project.*

Homebuyer Opportunity Limited Tax Exemption (HOLTE):

The purpose of this program is to encourage homeownership among low- and moderate-income families. It provides a 10-year property tax exemption for the structural improvements of a new or rehabilitated single-unit housing, but not the land value. The program is available for properties valued at no more than 120% of the median sales price and allows each city to determine its own income and owner-occupancy requirements. Eligible building types include single-family housing units, multifamily homeownership units (e.g., condos and townhomes), and manufactured housing. *Key Takeaway: This program could provide a powerful incentive for affordable homeownership, but would require close coordination with other overlapping taxing districts.*

A more detailed comparison of the available programs is included in **Appendix E**.

Rationale	Tax abatements can substantially contribute to the feasibility of both market-rate and regulated units. Saving on operational costs contributes to greater net operating income, which is important in determining project value and development feasibility. By reducing ongoing operating costs for housing through a housing tax abatement, the City could help incent developers to include affordable units as part of larger development projects.
Policy Objectives	1 (Diversity of Unit Types), 2 (Partnerships), 5 (Accessible Locations)
Summary of Stakeholder Feedback	Developers consider this tool highly impactful. This would require more research about which abatements to explore.
Potential Impact	◆◆ Or ◆◆◆ An abatement can be an important incentive to enable new development; more research into the abatements that work best for Wilsonville is needed (see next steps).
Administrative Effort	◆ Market and policy analysis plus stakeholder outreach (including outreach to overlapping taxing districts) is required to evaluate and adopt options. Ongoing administration depends on the program, and can include processing applications, managing agreements, and monitoring compliance.
Applicable Geographies	Zone specific: Vertical Housing (Villebois, Town Center), MUPTE (core or transit-oriented housing for market-rate housing) Citywide: MUPTE (with affordability restrictions), HOLTE, temporary exemption for newly rehabilitated or constructed multiunit rental housing
Partners	Other taxing jurisdictions
Funding Required	N/A. Foregone revenue
Next Steps	<ul style="list-style-type: none"> • Explore the following implementation considerations: <ul style="list-style-type: none"> ○ How much revenue would the City be willing to forgo on an annual basis? Does the City want to limit the number of abatements provided? ○ How can the City best assess the benefit it receives in exchange for the abatement?

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- How would the City evaluate and select projects that would receive the abatement?
 - Would the City be interested in leading an effort to abate its own taxes, in addition to working with other taxing jurisdictions to seek abatement of their taxes, to encourage deeper levels of affordability?
 - Determine City goals for how many units can receive an abatement.
 - How would the City accommodate reporting requirements?
 - How does the City weigh the temporary (up to 10 years) loss of tax revenue against the potential attraction of new investment to targeted areas?
 - Is there a threshold at which the City would end the program, such as after certain number of units receive the abatement?
 - Identify geographies where specific abatements would be most effective.
 - Conduct a financial analysis of the expected cost to the City and other taxing jurisdictions and potential program impact.
 - Reach out to overlapping taxing districts to gauge support for the City's priority program(s). To extend the exemption to all taxing districts, the City must secure support (in the form of a resolution) from governing boards representing at least 51% of the total combined rate of taxation levied on the property.
 - If the City ultimately decides to implement MUPTE, the City must adopt the provisions of ORS 307.600 to 307.637 by resolution or ordinance. The City must designate a specific area if MUPTE will be applied to market-rate housing; for housing subject to affordability restrictions, the City can designate the entire city for the exemption.
 - Prior to passing an ordinance or resolution to adopt MUPTE, the City must hold a public hearing to determine whether qualifying housing would otherwise be built or preserved without the benefit of the exemption (most cities do this per project). The City must also establish standards and guidelines to consider applications and make decisions, including setting eligibility criteria.
 - Adopt the selected tax abatement(s) by resolution, including specifying any local parameters and definitions required for the abatement in question.
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1E: Facilitate Connections to Partners and Housing Resources Through City Liaison

Summary	<p>The City would designate a point person to serve as a resource for community members and interested housing stakeholders. That staff person would:</p> <ul style="list-style-type: none"> • Help to implement Strategic Plan implementation actions. • Conduct ongoing outreach with the County, Metro, development community, community-based organizations, and service providers. • Connect prospective homeowners, renters, and people experiencing homelessness with the array of resources available through other partners. The City does not expect to be able to offer its own housing services, including homeless services, in the near term. • Create and maintain the online One Stop Shop that would include a directory of housing-related resources on the City's website for community members, key stakeholders, and interested developers. See City of Milwaukie's One Stop Shop for an example: https://www.milwaukieoregon.gov/housingaffordability.
Rationale	Achieving lasting implementation of the Strategic Plan requires focused attention. The Housing Liaison would be able to track current conditions, build relationships with local stakeholders, support renters, maintain information on the website, and help to implement the Plan.
Policy Objectives	2 (Partnerships), 3 (Homeownership), 4 (Prevent Displacement), 7 (Social Equity)
Summary of Stakeholder Feedback	The City could provide resource referrals, but it is not the City's role to provide the resources (i.e., renter support, landlord counseling). The City lacks information for interested housing developers.
Potential Impact	◆ to ◆◆ Focused attention on implementation can help advance Council's priorities. In addition, this staff person could increase the City's exposure to potential funding partners, including regional, state, and private players.
Administrative Effort	◆ to ◆◆ Requires staff allocation.
Applicable Geographies	Citywide
Partners	Clackamas County, Metro, State, nonprofit/for profit developers, nonprofit organizations
Funding Required	General fund
Key Considerations	<ul style="list-style-type: none"> • This staff person could either be a full-time housing liaison, or the responsibilities could be folded into another staff role.
Next Steps	<ul style="list-style-type: none"> • Determine needed staffing levels and designate a staff person. • Develop a work plan, which includes the creation of an online one stop shop, stakeholder engagement, and Plan implementation. • Monitor engagement and partnership development.

2A: Secure Land for Development of Affordable and Equitable Housing

Summary	The City could consider developing a program to position its current land holdings for future housing development, and to buy and hold land for future development opportunities. This supports affordable housing by reducing or eliminating land cost from development. The City has a number of properties in its portfolio that could serve as housing opportunity sites, including the Public Works/Police/Community Center property and the Wilsonville Transit Center.
Policy Objectives	2 (Partnerships), 3 (Homeownership), 5 (Accessible Locations), 7 (Social Equity)
Summary of Stakeholder Feedback:	There is an overall favorable opinion, especially among potential developers who expressed concern about the lack of available land for infill development. This action requires more research about potential funding sources, strategy execution, and target properties.
Potential Impact	◆◆◆ Control of land is one of the key sources of local government leverage for housing development.
Administrative Effort	◆◆ Requires development of a land banking or acquisition strategy that includes a funding source. For properties the City already owns, the administrative effort is minimal.
Key Considerations	<ul style="list-style-type: none"> • This is an important tool to use in “down market” conditions, when land prices decrease or property owners are more willing to sell land due to tax implications. The City and Metro have more patient money than many private developers. • Depending on the City’s goals, it could look for private foundation and government grants. • Key challenges for land acquisition include reliably identifying future areas of gentrification before prices go up, developing the resources necessary to purchase the land, creating mechanisms for easy land transfer, and removing the liability associated with holding land.
Next Steps	<ul style="list-style-type: none"> • Inventory City and publicly-owned property. • Determine the viability of a policy that prioritizes surplus property for housing development. Such a policy would not stipulate that all surplus property will or can be developed for housing, but that the City must at least evaluate a parcel’s potential for housing before selling the property or using it for another purpose. • Explore the feasibility of a City-led effort to work with partners, including regional land banks, to optimize the use of City-owned land. This could include a parcel-by-parcel development opportunity study or a set of conversations with potential development partners about the opportunities and challenges for each parcel. • Identify the sources of funding the City has to deploy, and how the City could leverage those funds with outside funding.

- Conduct an analysis of potential acquisition opportunities.
- Consider the role of the Metro housing bond in helping to fund affordable housing projects on City-owned parcels.

2B: Modify Parking Requirements, Which May Reduce Housing Costs

Summary

Parking requirements can have an adverse impact on land and development costs, leading to an increase in housing costs. In some communities, there are areas where the required parking is considerably more excessive than the need. This is especially true as areas transition to support more people traveling by transit, carpool, bicycle and walking/rolling. Parking that is developed but rarely used consumes a lot of land and resources.

Some communities have helped increase development feasibility by looking more closely at their parking policies, including shared parking policies, minimum parking requirements, and comprehensive parking plans and strategies for commercial districts such as Wilsonville's Town Center.

Reducing parking requirements for regulated affordable housing can allow more housing units to be built on a given site, especially when paired with density bonuses, and can reduce the cost of building surface parking, which costs roughly \$5,000 per space. Regulated housing for people who are disabled or elderly, and those that are close to regional transit, typically have lower levels of car ownership and needs for parking. There is potential to limit this to subsidized units, areas with better transit access, or provide a case-by-case review depending on the project parameters.

Policy Objectives	1 (Diversity of Unit Types), 2 (Partnerships), 5 (Accessible Locations)
Summary of Stakeholder Feedback	There is split agreement on this action. Some stakeholders are in favor and others oppose. This requires more research and discussion.
Potential Impact	◆◆ For some projects, especially affordable housing projects, a reduction in parking requirements can mean greater feasibility.
Administrative Effort	◆◆ Requires stakeholder outreach and staff time to develop standards.
Key Considerations	Given that much of Wilsonville does not have easy access to frequent transit service, parking is going to continue to be needed for nearly all housing development. This is more likely to benefit regulated affordable housing developments which truly have less need for parking than market-rate housing.
Next Steps	<ul style="list-style-type: none"> • Discuss potential parking requirement reductions with key stakeholders, including nonprofit and for profit housing developers. • Determine eligibility requirements, including how much of a parking reduction would be appropriate for affordable housing units. • If the City decides to move forward, draft the amendments, provide opportunities for public comment, and bring them forward for hearings.

2C: Explore Tactics to Reduce the Impact of Systems Development Charges on Affordable Housing

Summary

Systems Development Charges (SDCs) can have an impact on the feasibility of a housing project. Some cities make changes to their SDC schedules to incent more affordable housing types, while others provide reductions or waivers to projects that meet specific program criteria. Many programs require that eligible projects must include a share of affordable units. This reduces the cost to build affordable housing and can allow affordable housing developers to produce units more cost-effectively, particularly in new urban growth areas. Potential avenues for the City to explore for eligible projects that meet City criteria include:

- Tying SDCs to the overall size of housing unit (potentially regardless of number of fixtures or size of infrastructure).
- Delaying collection of SDCs and/or time of investment.
- Offering reductions or waivers on SDCs or permit fees, which reduces the cost to build those types of housing.

Policy Objectives 2 (Partnerships), 6 (Expand subsidized housing stock)

Summary of Stakeholder Feedback

This could be an effective tool to bridge the feasibility gap. Developers consider these tools highly impactful.

Potential Impact

◆◆◆ Developers working in Wilsonville have stated that SDCs have a big impact on project costs, even though Wilsonville's SDCs are comparable to the regional average. This makes waivers a valuable incentive; however, the City cannot waive SDCs collected by the County or special districts without prior approval. The City must balance its affordable housing goals with its ability to pay for infrastructure to support new housing.

Administrative Effort

◆ to ◆◆ Depends on program criteria and ongoing monitoring required.

Key Considerations

- What projects would be eligible? Would it be projects that are not already subject to monitoring and compliance regulations, or should the City limit it to projects with state or federal funding and projects to be owned/operated by nonprofits?
 - How long of an affordability restriction would the City want to impose?
 - If the City were to exempt affordable housing from SDCs or permit fees and not subsidize from another source, how big of a reduction to permit and/or SDC revenue can the City sustain?
 - Are there other funding sources the City could identify to fill the gap? CET funds? Other?
-

Next Steps

- Conduct an analysis of funding implications, including what revenue sources are needed to subsidize foregone revenues from reducing or waiving SDCs.
- Coordinate among City staff and policymakers to identify desired project eligibility.

2D: Explore Partnerships with a Community Land Trust

Summary

Wilsonville faces a lack of affordable homeownership options for middle-income households. From 2015 to 2019, just 10% of homes in Wilsonville sold for under \$300,000. One potential option to bridge the gap would be to partner with a Community Land Trust (CLT), which can make homeownership affordable through a shared equity approach. A qualified family, with the assistance of the CLT, can purchase a home at a reduced price that they can afford. The CLT attaches a deed restriction that requires the family to “pay it forward” when they sell the home by selling the property to another qualifying family. The deed restriction prescribes a formula for future resale prices and equity recapture to ensure that the homes remain affordable for future residents in perpetuity while helping the current homeowner build wealth. The CLT serving the Portland region and other areas of the state is Proud Ground. Proud Ground estimates that \$100,000 to \$120,000 is needed to subsidize a new home affordable at 60% to 80% AMI in Wilsonville; if purchasing an existing home, subsidy equivalent to about 20% of value of home is needed.

The City would be unlikely to manage a CLT itself. Instead, the City could support a CLT subsidy in several ways, including land write-downs, permit fee/SDC waivers and outright subsidy.

For more information on home prices in Wilsonville, see **Appendix A: Housing Market Research Report** (page 18).

Policy Objectives	2 (Partnerships), 3 (Homeownership), 4 (Prevent Displacement), 6 (Affordable Housing Stock), 7 (Social Equity)
Summary of Stakeholder Feedback	There are few entry-level homes that would be affordable to first-time homebuyers in Wilsonville. The City should do more to support homebuyers with modest incomes.
Potential Impact	◆◆◆ A supply of affordable, entry-level homes is one of the critical missing pieces in Wilsonville’s array of housing options.
Administrative Effort	◆ This action will require staff time to meet with Proud Ground and coordinate possible partnerships. Proud Ground’s model works with either subsidies/land that support the construction of new affordable homes or subsidies that make the acquisition of existing homes affordable to first time homebuyers.
Key Considerations	<ul style="list-style-type: none"> • What funding sources are available to support CLT homes? • Are there homes on the market, perhaps during a post-COVID-19 recession, that are for sale at a reduced price and would make excellent candidates for City-subsidized land trust homes? Could the City partner with Proud Ground on an acquisition strategy for distressed home sales? • How can the City require or incent developers to work with Proud Ground? For example, could the City work with Proud Ground to partially subsidize some homes in a new development so that they become CLT homes? • Are there city-owned parcels that are suitable for new development? If city-owned land is in an area with concentrated poverty or low transit access, can it be swapped for another parcel?

Next Steps

- Contact Proud Ground, which has expressed interest in working with Wilsonville and has CLT homes throughout Clackamas County.
- Identify funding opportunities to support permanently affordable homeownership through a CLT.

2E: Explore Homeownership Support Programs

Summary	Homeownership is key to wealth building and is strongly supported by stakeholders and City leadership. Advancing this action will also interact with and help to advance many of the other actions. For example, SDC waivers and tax abatements can be structured to help encourage homeownership product and increasing access to homeownership is a key tool for reducing displacement.
Policy Objectives	3 (Homeownership), 4 (Reduced Displacement), 7 (Social Equity)
Summary of Stakeholder Feedback	There are few entry-level homes that would be affordable to first-time homebuyers in Wilsonville. More support for homebuyers is desired.
Potential Impact	◆ to ◆◆ The amount of impact depends on the program pursued, the level of financial support the City could provide, and the strength of the partnerships developed through these efforts.
Administrative Effort	◆ to ◆◆ Depends on program parameters and City involvement.
Key Considerations	<ul style="list-style-type: none"> • Does the City have funding capacity available to support homeownership programs? • How can the City best develop a partnership with other entities working to encourage affordable homeownership opportunities?
Next Steps	<p>Conduct outreach with potential partners to determine the City's role, potential new programs the City could develop, and potential impact. The City could provide the following:</p> <ul style="list-style-type: none"> • Education on Homeownership Preparation. Help first-time homebuyers learn the basics about the home buying process in classes taught by experienced professionals who specialize in helping first-time homebuyers. Special topics on HOAs can be included. <i>Potential Partners: The City could coordinate with existing organizations such as the Portland Housing Center to facilitate this training or develop its own program.</i> • Alternative Funding Sources for Down Payment and Mortgage Assistance. Expand financing options to low-income and middle-income households who plan to purchase a home. Down payment assistance is the quickest way to help households access the homeownership market. While this approach does not lead to the home being permanently affordable, it is an efficient way to help individual qualified households. <i>Potential Partners: Clackamas County Housing Authority, nonprofit organizations.</i>

- **Partnership with local nonprofits.** Work with Proud Ground or Habitat for Humanity to develop affordable homeownership projects, especially if there is publicly-owned land available or other incentives (e.g., a waiver of Systems Development Charges). Connect renters interested in home ownership to these local nonprofits for assistance with the home purchasing process. Investment needed to help homebuyers purchase an existing home in the Portland region is about 20% of home value. In Wilsonville, this may be higher because the city's housing stock is newer and more expensive. *Potential Partners: Proud Ground, Habitat for Humanity.*
- **A Homebuyer Opportunity Limited Tax Exemption Program.** The purpose of this program is to encourage homeownership among low- and moderate-income families. The tax exemption can be granted for up to 10 years for the value associated with property improvements, but not the land value. Eligible building types include single-family housing units, multifamily homeownership units (e.g., condos and townhomes), and manufactured housing. Please see **Appendix D** for more information. *Potential Partners: Clackamas County and other taxing jurisdictions, as applicable.*
- **Financial and Logistical Support for Voluntary Sale of Manufactured Home Communities to Resident Groups as Resident-Owned Communities and to Nonprofits or a Housing Authority as Permanently Affordable Housing.** These models of ownership provide stability, predictability, and affordability for residents. The communities are acquired at market value from willing sellers with financing and incentives from Oregon Housing and Community Services, private lenders, and various grant sources. *Potential Partners: OHCS, foundations, Clackamas County Housing Authority.*

2F: Explore Housing Preservation Tax Abatement

Summary

As suggested in Action 1D, the City could explore the creation of a tax abatement program specifically targeted toward existing low-cost, market-rate rental properties to reduce potential displacement of tenants living in those properties. The City would use the Multiple Unit Property Tax Exemption Program (MUPTE) with a set of program parameters targeted toward preservation.

MUPTE is a flexible program that can be used to incent multifamily housing with particular features or at particular price points by offering qualifying developments a partial property tax exemption for 10 years. Though the state enables the program, Wilsonville can shape the program to achieve its preservation goals by controlling the geography of where the exemption is available, application process and fees, program requirements, criteria, and program cap. One important implementation consideration is the need to monitor compliance over the course of the abatement.

Statute allows for MUPTE to be used for existing multiple-unit housing that is or becomes subject to an affordability agreement with a public agency. This means that the City could offer the tax abatement authorized under MUPTE in exchange for signing an agreement with a public agency (e.g., the local Housing Authority or another affordable housing provider) to regulate rents. Because the statute is flexible about the nature of the affordability agreement, it could be structured to limit the annual increase in rents or to require a reduction based on the value of the tax abatement. The City could require that participating property owners invest in renovations in order to qualify, but this is not required under statute. ECONorthwest has been exploring a similar preservation-focused tax abatement in the City of Scappoose. Possible options include:

- **Rehabilitation Emphasis:** Make renovations an eligibility requirement, with a required investment amount that is proportional to (and less than) the value of the tax abatement to the property owner. Require that participating property owners prioritize investments in health and safety improvements first, and then improvements for energy efficiency, universal accessibility, etc. Limit the rate of rent increases for the duration of the tax abatement (e.g., 2% or less).
- **Rent Reduction Emphasis:** Do not require renovations, but require that rents be reduced in proportion to the tax abatement, with a limit on the rate of increase year-to-year.

Policy Objectives	2 (Partnerships), 4 (Reduce Displacement), 7 (Social Equity)
Summary of Stakeholder Feedback	Residents are concerned about the potential for displacement, given rising rents in the community.
Potential Impact	◆◆ Or ◆◆◆ An abatement can be an important incentive to ensure affordability; more research into the abatements that work best for Wilsonville is needed.

Administrative Effort	◆ Policy analysis plus outreach with overlapping taxing districts and existing property owners is required to evaluate and adopt options. Ongoing administration depends on the program, and can include processing applications, managing agreements, and monitoring compliance.
Key Considerations	<ul style="list-style-type: none"> ● For either option described above, the affordability agreement should require rent restrictions but not income qualification in order to avoid creating administrative burden for the property owner and to ensure that existing residents would be able to remain. ● For enforcement, participating property owners could be required to submit current rent rolls and provide written notice to all tenants of the affordability agreement with contact information to report any potential violations. ● Since income qualification would not be necessary, the City could, in theory, establish affordability contracts directly with property owners. This would require some additional administrative effort, but much less than income certification.
Next Steps	<ul style="list-style-type: none"> ● Explore implementation considerations: <ul style="list-style-type: none"> ○ Would the City’s program focus on goals of rent reduction, unit rehabilitation, or another goal? ○ Are affordable housing providers willing to partner on implementation of affordability restrictions for preservation projects? If providers are unwilling to take on this role, consider whether City staff can administer a preservation program like the one described above. If the City is willing to take this on, staff may need additional support to create the program. ○ How would the City find eligible property owners and market the program? ○ How would the City evaluate and select projects that would receive the abatement? ○ How much revenue would the City be willing to forgo on an annual basis? Does the City want to limit the number of abatements provided? How does the City weigh the temporary (up to 10 years) loss of tax revenue against the potential attraction of new investment to targeted areas? ○ How can the City best assess the benefit it receives in exchange for the abatement? ○ Would the City be interested in leading an effort to abate its own taxes and work with other taxing jurisdictions to seek abatement of their taxes as well, to encourage deeper levels of affordability? ○ How would the City accommodate reporting requirements? ○ Is there a threshold at which the City would end the program, such as after a certain number of units receive the abatement? ● Conduct a financial analysis of the expected cost to the City and other taxing jurisdictions and potential program impact.

2G: Support Local Home Repair Programs

Summary	<p>A home repair program would provide grants to lower-income and fixed-income homeowners who may be struggling with their home's maintenance needs. Such a program would help stabilize households and reduce displacement, including households in manufactured housing.</p> <p>Catalyst Partnerships NW, based in Beaverton, already operates a home repair program that has benefitted Wilsonville residents by connecting homeowners with volunteers from local faith organizations including Grace Chapel and Community of Hope Lutheran Church. Catalyst Partnerships NW mobilizes volunteers to provide home repairs and remodeling services for elderly, disabled, and under-resourced homeowners. The group is funded through tax-deductible donations. The City could help to support such a program by providing direct grant funding, helping the organization pursue grants, and offering City resources and organizational support.</p>
Policy Objectives	3 (Homeownership), 4 (Reduced Displacement), 7 (Social Equity)
Summary of Stakeholder Feedback	Members of the task force were especially supportive of programs to reduce displacement and support community partnerships.
Potential Impact	◆ to ◆◆ Impact would focus on existing homeowners, especially older residents and those with limited mobility. The level of impact depends on the amount of funding that the City could provide.
Administrative Effort	◆ to ◆◆ Depends on program parameters and City involvement.
Key Considerations	<ul style="list-style-type: none"> • Does the City have funding capacity available to support a home repair program? • How can the City best develop a partnership with Catalyst Partnerships NW or other groups?
Next Steps	<ul style="list-style-type: none"> • Conduct outreach with potential partners to determine the City's role. • Determine City's capacity to fund projects, provide in-kind support, or identify potential program participants.

2H: Assess Accessibility and Visitability Standards or Incentives

Summary	“Visitability” describes a set of home design standards that address accessibility needs of visitors with mobility impairments. The three principles of visitability are at least one zero-step entrance, wide doorways and hallways for clear passage, and at least one bathroom with wheelchair access on the main floor. The City of Wilsonville can adopt new design codes or grant incentives for developments with visitability standards.
Policy Objectives	1 (Diverse Housing Types), 7 (Social Equity)
Summary of Stakeholder Feedback	Through the library kiosk, <i>Let’s Talk, Wilsonville!</i> website, and renter survey, many residents expressed a desire to see more single-level homes. This speaks to the need for more accessible homes that can accommodate people with mobility challenges.
Potential Impact	◆ The City’s initiative to consider the needs of all ages and abilities could be a welcomed change for the residents. The new standards could apply to new construction or to building retrofits (which would increase the impact).
Administrative Effort	◆◆ or ◆◆◆ The City Council can propose and adopt the three principles of the visitability standards relatively quickly. More staff time will be required for creating incentives associated with visibility standards.
Key Considerations	<ul style="list-style-type: none"> • Is visitability a concern for current and future residents? • Are there existing design or space limitations for enhancing visitability (i.e., on-site stormwater mitigation, narrow lots)? • How might additional requirements or incentives for accessibility add to development costs and increase rents and sales prices? • Would small, accessible cottage homes be a viable housing type to meet accessibility needs, especially affordable homeownership? • What do households with accessibility needs want in a single-level, affordable home? • Are there any creative ways to make affordable and accessible apartments, infill duplexes, and accessory dwelling units? • How does Wilsonville’s topography limit the development of accessible homes, often leading to the need for stairs in site design?
Next Steps	<ul style="list-style-type: none"> • Disseminate information on visitability standards among policymakers. • Review the State’s Affordable Housing Standards, which provide accessibility requirements for affordable homes. • Through HB 2001 implementation (Action 1B), explore the design approaches like stacked duplexes, where first floor is the more accessible unit. • Reach out to other communities for guidance, such as the City of Milwaukie, which has adopted a Cottage Cluster Code with developer incentives. • Identify Development Code sections that need to be amended.

5. Steps for Implementation

In the coming years, implementing the Plan will require the City to balance and coordinate its pursuit of actions, funding, and partnerships with its other policy and programmatic priorities. This section outlines an implementation process that will improve success with advancing this Plan's near-term actions while building momentum toward the larger goal of achieving housing equity.

Develop and Assign Work Programs

After the Plan's adoption, the City will move towards implementing the Plan's actions. Doing so will require detailed work programs, assignments of staff to complete analysis and initiate conversations with stakeholders, and meetings with Clackamas County and other partners to identify potential partnership opportunities. Implementation of some actions will require dedicated staff time and budget, which the Plan accounts for in Action 1E through the creation of a housing liaison position.

Explore Funding Tools

This Plan outlines five implementation actions for near-term implementation and eight actions for further exploration. Many of these actions will require on-going funding for implementation. As outlined on page 13, there are a number of funding programs that could support these actions, most of which are not locally controlled. In the near term, City Council and staff should:

- **Explore the Creation of a Construction Excise Tax:** Based on City Council direction, the City will begin this effort by evaluating the potential for creating a Construction Excise Tax in the first year of implementation (see **Appendix C**). The CET is a locally controlled and implemented tool that generates revenue from building construction specifically to support affordable housing program implementation.
- **Track Metro Housing Bond:** The next round of funding will be available for the Metro Affordable Housing Bond in 2022. The City should complete the necessary analysis and stakeholder conversations to best position itself to compete for these funds on target projects, including the potential transit-oriented housing development at the Wilsonville Transit Center (Action 1A).

Carrying out the actions outlined in this Plan will require the City to continually review potential sources of funding. The City will explore other funding sources as each action requires, and as opportunities for partnerships and grants arise.

Involve the Community

The City will continue engaging the community in this work, seeking input regarding the nature of housing challenges as the economy evolves. The City will pay particular attention to those community members who experience housing inequities, including lower-income renters, communities of color, and people with disabilities. These community members will be best positioned to inform the City's next set of actions beyond those identified in this Plan.

As implementation activity continues, the City may realize efficiencies through establishing an ongoing equitable housing advisory committee composed of service providers, employers, real estate professionals, and community members. Through the proposed housing liaison identified in Action 1E, the City should maintain an open line of communication to understand evolving needs and how the City can best respond to those needs.

Build Partnerships

Many partners and funders seek to improve access to equitable and affordable housing in the Portland region. Stakeholders include nonprofit housing developers, Metro, Clackamas County, community-based organizations, school districts, tenant's rights organizations, land trusts and other nonprofits focused on increasing access to home ownership, the State of Oregon (especially Oregon Housing and Community Services), and others. Wilsonville staff will conduct outreach with these organizations to understand their roles in meeting Wilsonville's housing needs and finding joint funding opportunities.

Develop Indicators

Priorities for implementation will evolve over time, as actions are completed and Wilsonville's needs change. Tracking the City's progress towards implementing the Plan is important to determine whether the activities the City is implementing have the desired impacts and to inform future updates to this strategy with key trend data. To keep Plan implementation on track, the City will identify a limited set of indicators that are based on available data and most likely to express how well the City's actions are improving conditions for those who experience housing inequities. Additional indicators will be identified to track the progress of individual actions as they are implemented.

The City will track equitable housing activities and information about these indicators in a new section of its Annual Housing Report. In the 2021 Annual Housing Report, the City will establish a baseline evaluation of potential indicators as a "learning laboratory" that will be used to track progress toward equitable outcomes. The indicators used in the annual report may change over time, especially if new data become available or market conditions change.

Exhibit 4 shows potential indicators that the City could track through its Annual Housing

Report process. Determining the exact indicators will (1) require additional research into availability of data and (2) additional discussions with City leaders and the community to make sure the indicators can adequately gauge equitable housing progress. The City will use the list in Exhibit 4 as a starting point for its research.

Exhibit 4. Potential Indicators for Future Exploration

Policy Objective	Potential Indicators
1. Greater availability of a diversity of housing types for a full range of price points to serve the community	Number and type of new homes produced and total within the city over time - location, tenure, size, sale price/asking rent, accessibility/visitation (measure TBD), and unit type
2. Increased partnerships with nonprofit and for-profit housing developers	Number of properties or units acquired by City, County, or nonprofit partner
	Permits issued for nonprofit developments
3. New and expanded affordable homeownership opportunities, especially for first-time homebuyers	Mortgage applications and denials, including by race and ethnicity
	Home purchases by transaction type – cash vs. mortgage by type (conventional, FHA, VA, etc.)
	Share of homebuyers receiving assistance (e.g., down payment assistance)
4. Reduced risk of housing displacement	Share of rent-burdened residents
	Number of requests County receives for tenant assistance from the Wilsonville zip code (211 data)
5. Targeted housing opportunities in areas with access to services and public transit	Number of new market-rate and affordable homes in ½ mile proximity/10- to 15-minute walk to daily shopping, medical services, and transit services
6. Maintenance and expansion of quality subsidized affordable housing stock	Number, location, and expiration date of regulated affordable units with change in units provided over time
	Land use regulations adopted with incentives for regulated affordable units
7. Implementation of all housing policies through a lens of social equity and inclusion	Neighborhood integration over time by income, household demographics, and sales prices/rents
	Share of racial and ethnic diversity as compared to County and region

NOTE: Proposed performance measures will require additional discussion to confirm them as well as how to integrate data collection and analysis into ongoing staff work flow. Potential data sources include City of Wilsonville, Clackamas County Assessor's Office, Home Mortgage Disclosure Act, the U.S. Census American Community Survey, 211, Regional Land Information System, Oregon Housing and Community Services, and proprietary sources (e.g., Costar and Property Radar).

Assess, Align, Update

As conditions change and the City makes progress towards its goals, the City Council should revisit and update the Plan on a periodic basis. Key questions that Council can consider in its assessment include:

- Is there a need to reprioritize the actions, based on changing conditions or the results of research into indicators?
- Should some of the actions move from the “Explore” category to the “Implement” category?
- Are additional actions needed to address new or changing conditions?
- Is staff capacity sufficient to meaningfully advance the key strategies?
- What benefits has the City seen from its efforts to date? Are the City’s residents, and especially its lower-income residents and communities of color, seeing a return on the investments that the City has made?

In the coming months, the City will have additional information about how the process of updating this Plan can be in alignment with newly required housing planning work. House Bill 2003, passed in the 2019 legislature, created new requirements for cities to regularly update their Housing Needs Analysis (HNA) and in conjunction, create a Housing Production Strategy. Wilsonville is scheduled to complete its next HNA in 2023 with its first Housing Production Strategy to follow in 2024.

While this document will certainly give Wilsonville a head start in meeting these requirements, rulemaking for the new Housing Production Strategy is still proceeding as of May 2020, and the specific requirements for that document are not known. Guidelines and requirements for the Housing Production Strategy will become clearer over the initial two-year implementation period of this Plan. This will create an opportunity to use the update process to scope how to address any additional requirements for the Housing Production Strategy the City will undertake in 2024. The City will align future updates of this document with timing of Housing Needs Analysis updates and the specific requirements for Housing Production Strategies.

Appendices

- A. Housing Market Research Report
- B. Summary of Stakeholder Input
- C. Construction Excise Tax Implementation Roadmap
- D. All Actions Evaluated
- E. Property Tax Abatements for Housing in Oregon

¹ Walkerly and Russel, September 2016, accessed online at:
https://ssir.org/articles/entry/what_the_heck_does_equity_mean

² Andersson, Fredrik, John C. Haltiwanger, Mark J. Kutzbach, Giordano E. Palloni, Henry O. Pollakowski, and Daniel H. Weinberg. "Childhood Housing and Adult Earnings: A Between-Siblings Analysis of Housing Vouchers and Public Housing," National Bureau of Economic Research, 2016.

³ Tract-level CHAS 2012-2016, Tables 1, 8, 9, compiled by Metro's Data Research Center.
<https://www.huduser.gov/portal/datasets/cp.html>

⁴ Fernald, Marcia, Ed., "The State of the Nation's Housing 2013," Joint Center for Housing Studies of Harvard University, 2013, <http://www.jchs.harvard.edu/sites/jchs.harvard.edu/files/son2013.pdf>.

⁵ ECONorthwest analysis using methodology from the following paper: Chakrabarti, Ritashree, and Junfu Zhang. *Unaffordable housing and local employment growth*. No. 10-3. Federal Reserve Bank of Boston, 2010.

⁶ Wright, Bill, Keri Vartanian, Grace Li, and Maggie Weller, "Health in Housing: Exploring the Intersection Between Housing & Health Care," The Center for Outcomes Research & Education, Providence Health & Services, 2016, https://oregon.providence.org/~media/Files/ Providence%20OR%20PDF/core_health_in_housing_full_report_feb_2016.pdf.

⁷ Desmond, Matthew and Gershenson, Carl, "Housing and Employment Insecurity among the Working Poor." *Social Problems*, Volume 63, Issue 1, 1 2016, Pages 46–67, <https://doi.org/10.1093/socpro/spv025>

Appendix A: Housing Market Research Report

This memorandum was part of the presentation materials for the September 2019 Task Force and Planning Commission meetings

City of Wilsonville

Housing Market Research Report

August 2019

For over 40 years ECONorthwest has helped its clients make sound decisions based on rigorous economic, planning, and financial analysis. For more information about ECONorthwest: www.econw.com.

ECONorthwest prepared this report for the City of Wilsonville. It received substantial assistance from Communitas, LLC and Commonworks Consulting as well as Kim Rybold at the City of Wilsonville. Other firms, agencies, and staff contributed to other research that this report relied on.

This project is partially funded by a Metro 2040 Grant. That assistance notwithstanding, ECONorthwest is responsible for the content of this report. The staff at ECONorthwest prepared this report based on their general knowledge of housing economics, and on information derived from government agencies, private statistical services, the reports of others, interviews of individuals, or other sources believed to be reliable. ECONorthwest has not independently verified the accuracy of all such information, and makes no representation regarding its accuracy or completeness. Any statements nonfactual in nature constitute the authors' current opinions, which may change as more information becomes available.

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1 Purpose and Context

As housing affordability declines in Wilsonville, community members have expressed concern about being displaced or having to move out of the city in search of more affordable rental and homeownership opportunities elsewhere. A number of community members have testified before the Wilsonville City Council about how the large and sudden rent increases threaten community members' housing stability.

To address the community's housing needs now and in the future, the City of Wilsonville has identified the need to establish a roadmap toward a more equitable housing system. Generally speaking, equitable housing means more people are able to find a home that meets their needs for location, price, and household needs. In the midst of a regional housing crisis, Wilsonville is poised to design a strategy that expands opportunities and access for more people to enjoy the quality of living in the city.

The purpose of this Housing Market Research Report is to synthesize background information on the current housing market to support decision making as the City develops its Equitable Housing Strategic Plan. In particular, the report focuses on housing affordability issues and identifies the types of housing that the City should plan for in the future. This analysis draws heavily on the Wilsonville Baseline Housing Needs Assessment, completed as a component of the Clackamas County Regional Housing Needs Analysis in 2019. Based on research and stakeholder outreach the team will conduct throughout Summer 2019, the Task Force and City Council identify which types of programs and policies are relevant to promoting equitable housing in Wilsonville.

The remainder of this document is organized into five sections:

2. Who lives in Wilsonville today?
3. What will Wilsonville's future population look like?
4. What are the current housing conditions in Wilsonville?
5. What types of housing will future residents need?
6. Conclusion

What is equitable housing?

Equitable housing goes beyond simple affordability. It aims to ensure all people have housing choices that are diverse, high quality, physically accessible, and reasonably priced, with access to opportunities, services, and amenities.

This broad definition includes choices for homes to buy or rent that are accessible across all ages, abilities, and incomes and convenient to everyday needs, such as transit, schools, childcare, food, and parks.

Equitable housing also represents a system that accounts for the needs of households with low income and communities of color, recognizes a history of housing discrimination, and complies with current state and federal fair housing policy.

Source: Metro

2 Who lives in Wilsonville today?

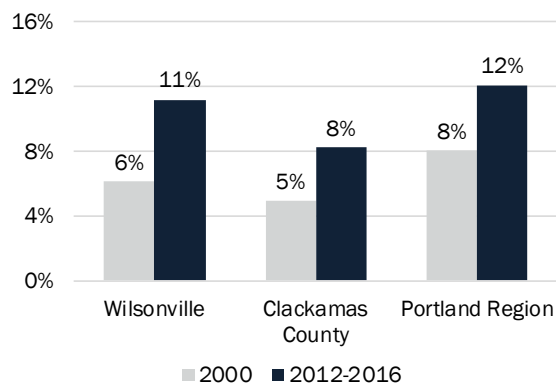
Wilsonville has grown quickly, and with that growth has come changing demographics and an increasing need for the City's leadership to focus on existing and future housing needs. From 2014 to 2019, Wilsonville saw a 15% increase in population and an 11% increase in housing units.¹ According to a recent article in the Portland Business Journal, Wilsonville ranks third in the entire state of Oregon in five-year population growth.²

Demographics have changed over the last 20 years.

Wilsonville's Latinx community is expanding. Between 2000 and 2016, the Latinx population in Wilsonville increased by about 2,000 people, almost doubling from a share of 6% to 11% of the population. Over the same period, the County and Portland Region saw slower growth in this population group. The growth rate of Wilsonville's Latinx population was greater than the growth rate of Wilsonville's population overall.

Exhibit 1. Share of Latinx Population, Wilsonville, Clackamas County, Portland Region, 2000 to 2012-2016, 2012-2016

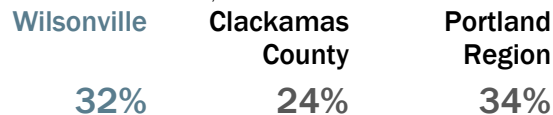
Source: U.S. Census Bureau, 2012-2016 ACS Table.



Millennials are a large proportion of Wilsonville residents. In 2012-2016, 32% of Wilsonville's population was between 20 and 40 years old. This is more similar to the share within the Portland region than in Clackamas County.

Exhibit 2. Population between 20 and 40 years of age, Wilsonville, Clackamas County, Portland Region 2012-2016

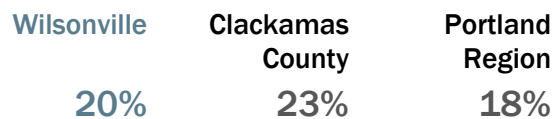
Source: U.S. Census Bureau, 2012-2016 ACS Table.



Ageing Baby Boomers are a small, but important population segment in the city. In 2012-2016, 20% of Wilsonville's population was over 60 years old. This is a greater share than the Portland region.

Exhibit 3. Population over 60 years of age, Wilsonville, Clackamas County, Portland Region 2012-2016

Source: U.S. Census Bureau, 2012-2016 ACS Table.



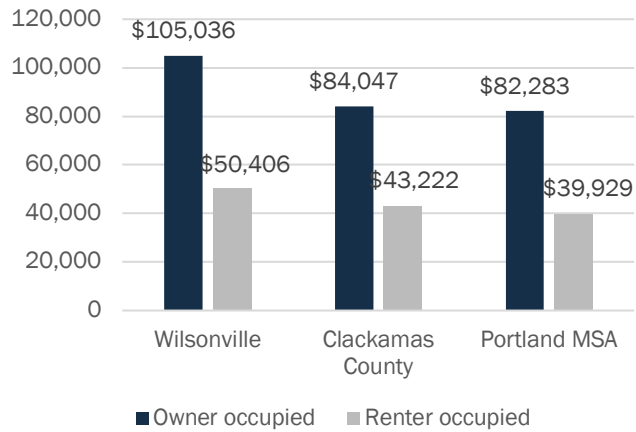
Incomes for owner households are generally higher than renter households.

The median household income for renters, just \$50,000, is less than half the median for homeowners, over \$105,000.

While average incomes in Wilsonville are higher than in the rest of the County and metro area, the magnitude of difference in income between renters and homeowners is similar.

Exhibit 4. Median Household Income by Tenure, 2012-2016

Source: U.S. Census Bureau, 2012-2016 ACS Table B25119.

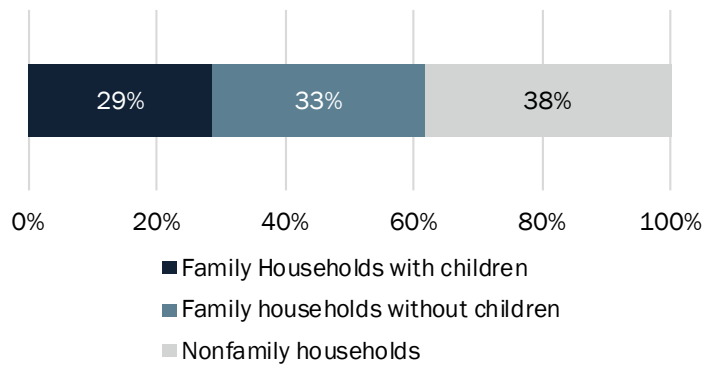


Incomes vary by family type.

The majority of households in Wilsonville are family households. Per the Census, “Family households consist of two or more individuals who are related by birth, marriage, or adoption, although they also may include other unrelated people. Nonfamily households consist of people who live alone or who share their residence with unrelated individuals.”³

Exhibit 5. Family and Non-Family Households, Wilsonville, 2012-2016

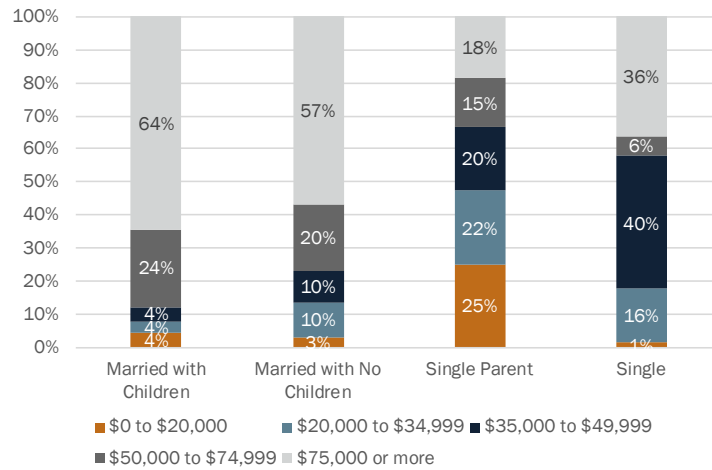
Source: U.S. Census Bureau, 2012-2016 ACS Table B25119.



Of all family types, single parent households in Wilsonville have some of the lowest incomes compared to the amount of housing they need. Two thirds of single parent households have less than \$50,000 in household income per year.

Exhibit 6. Household Income by Family Type, Wilsonville, 2012-2016

Source: U.S. Census Bureau, 2012-2016 ACS

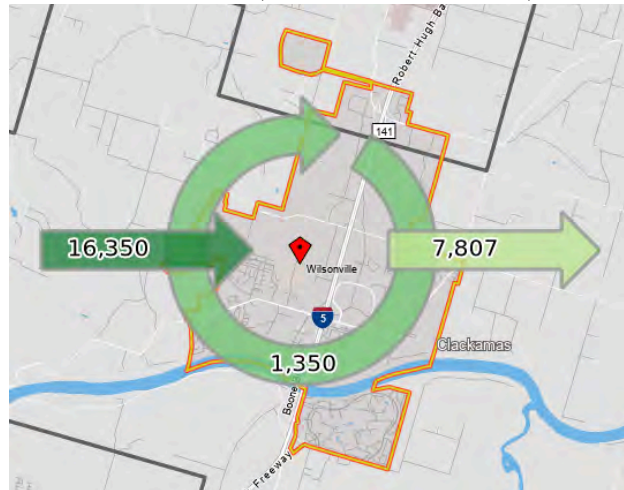


Most Wilsonville residents commute elsewhere to work.

As of 2015⁴, about 85% of employed residents leave Wilsonville for work, while over 16,000 workers come to Wilsonville from other communities.

Exhibit 7. Commuting Patterns in Wilsonville.

Source: U.S. Census Bureau, Center for Economic Studies, On The Map, 2015.



Many children attending Wilsonville schools are economically disadvantaged.

There are several schools in Wilsonville with a large share of economically disadvantaged students, which the Oregon Department of Education defines as students eligible for free and reduced price lunch.⁵ In 2016-2017, a family of four qualified for free lunches with a household income of \$31,590, and reduced price lunches with a household income of \$44,955.

Exhibit 8. Share of Economically Disadvantaged Students (per Oregon Department of Education) in Wilsonville Schools.

Source: Oregon Report Card 2016-2017.
<https://www.wlww.k12.or.us/domain/95> and Free and Reduced Price Meal Income Guidelines for School Year 2016-2017
<https://www.ode.state.or.us/wma/nutrition/snp/memos/nslp-income-guidelines.pdf>

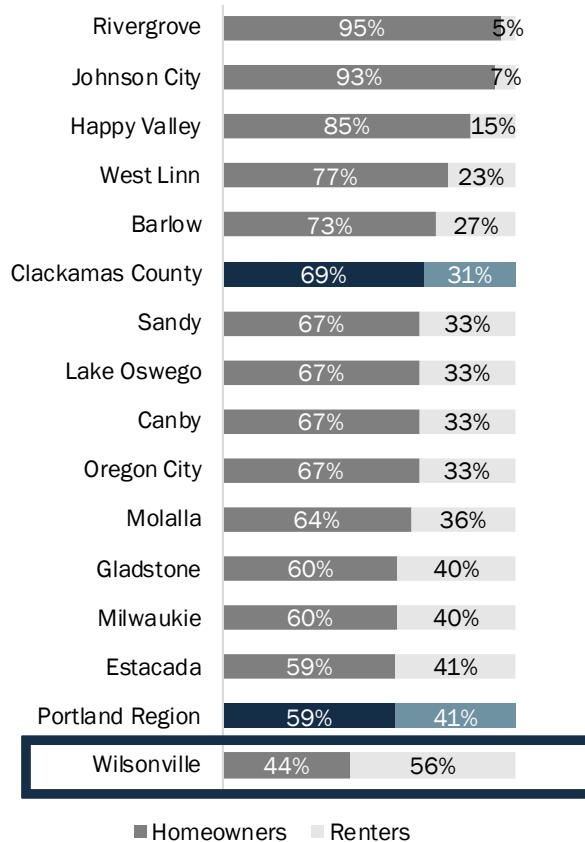
- Arts and Technology High School – 54%
- Boeckman Creek Primary School – 33%
- Boones Ferry Primary School – 40%
- Lowrie Primary School – 21%
- Wilsonville High School – 21%
- Inza Wood Middle School – 30%

The majority of Wilsonville households rent their homes.

In Wilsonville, over half of households rent their homes. In 2012-2016, about 56% of Wilsonville’s households were renters and 44% were homeowners. In every other major city in Clackamas County, the majority of households are homeowners.

Exhibit 9. Housing Tenure, Wilsonville and cities within Clackamas County, 2012-2016

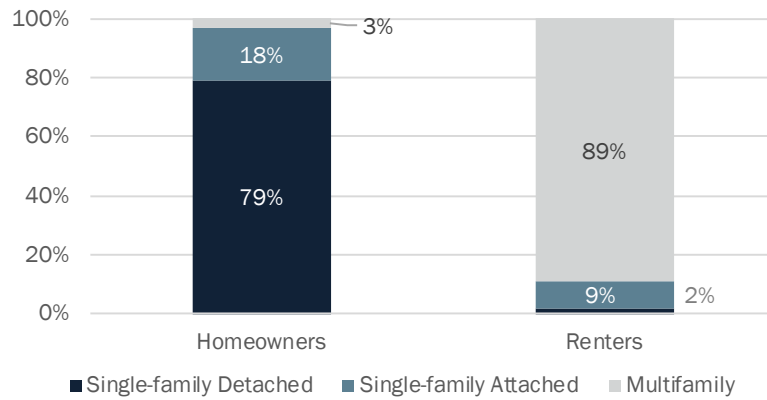
Source: U.S. Census Bureau, 2012-2016 ACS Table B25032.



In Wilsonville, homeowners mostly live in single-family houses, while renters mostly live in apartment buildings.

Exhibit 10. Housing Tenure by Housing Type, Wilsonville and Cities within Clackamas County, 2012-2016

Source: U.S. Census Bureau, 2012-2016 ACS Table B25032.



3 What will Wilsonville’s future population look like?

Wilsonville is expected to grow by over 3,000 new residents over the next 20 years.

By 2040, Wilsonville is projected to see a 14% increase over the 2019 population. Wilsonville is expected to add 3,373 people in about 1,752 households between 2019 and 2039. In recent years, however, the City has grown faster than Metro forecasts, with annual housing growth surpassing the forecasted growth in each of the past five years (15% population growth from 2014 to 2018).⁶ If this trend continues, population and household growth would likely surpass this estimate before 2039.

Exhibit 11. Forecast of Population Growth, Wilsonville UGB, 2019–2039

Source: Metro population forecast, 2015.

23,492	26,865	3,373	14% increase
Residents in 2019	Residents in 2039	New residents, 2019-2039	0.7% AAGR

Note: This forecast does not account for expected growth that may come as a result of the City’s recent UGB expansion in Frog Pond East and South and the 2019 adoption of the Town Center Plan.⁷

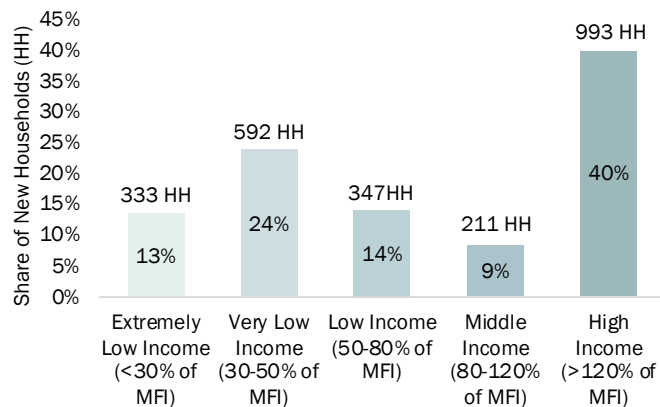
About half of new households in Wilsonville are forecast to be low income. These households will need affordable housing options.

This is similar to Clackamas County as a whole, where 47% of households are expected to be low income (with household incomes less than 80% of MFI).⁸

Exhibit 12. Future New Households in Wilsonville, by Median Family Income (MFI) for Clackamas County (\$81,400), 2019 to 2039

Source: U.S. Department of Housing and Urban Development. U.S. Census Bureau, 2012-2016 ACS Table 19001.

The percentages used below are based on current household income distribution, assuming that approximately the same percentage of households will be in each market segment in the future.



Recent forecasting work from the Portland State University Population Research Center and Metro points to the following trends over the planning period. Since specific estimates for Wilsonville are not available, we used Clackamas County, Portland Region, or Portland MSA trends:

- **More middle-aged Millennials.** Wilsonville currently has a larger share of Millennials than the County. The Population Research Center at PSU estimated future age cohorts by county. By 2040, Millennials will be between 40 and 60 years old. This generation is expected to grow from 23% of Clackamas County's population to 28% of the County's population. Family households in this age cohort are moving toward becoming "empty nesters" or multi-generation households.
- **A relatively constant share of people over the age of 60.** Between 2020 and 2040, the share of people over 60 years old is expected to stay relatively constant in Clackamas County, from 26% of the population to 27% of the population. However, Metro anticipates for the Portland MSA, the share of heads of households who are 65 and older will increase from 23% to 30% by 2038. Wilsonville will need to plan for a stable to growing share of older households.
- **An increasing share of Latinx households.** Metro's growth forecast projects an increase of about 329,000 new Latinx residents in the region by 2040. This represents 46% of all new residents in the region by that date, and a 116% growth in the share of Latinx residents over 2015.
- **Lower average household sizes.** Metro anticipates that the average household size for the seven-county metropolitan area is expected to drop from 2.6 people per household in 2018 to about 2.4 people per household in 2038. Today (and in 2038), almost two-thirds of households consist of one or two people.⁹ This trend suggests an increased need for smaller housing types.
- **Increasing monthly housing costs.** In its regional Housing Needs Assessment, Metro forecasts that "average monthly housing costs for both owners and renters will continue to increase above historical levels, with the projected increases being particularly acute for owners."¹⁰ Metro projects that household incomes will not increase as fast as housing costs, which means cost burdens will also increase, with new homeowners experiencing more significant increases than renters. This is because historic sales prices have outpaced growth in rents and household incomes, and this trend is expected to continue.¹¹ These results suggest that the need for additional entry-level ownership housing will continue to be strong.

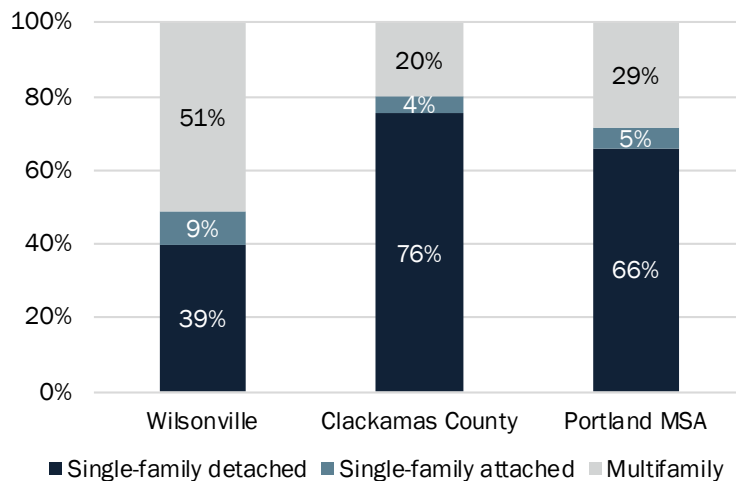
4 What are the current housing conditions in Wilsonville?

Wilsonville has an even mix of multifamily and single-family homes.

Wilsonville has a much larger proportion of multifamily homes than Clackamas County or the region as a whole. About half of all housing units in the city are located in multifamily buildings. Wilsonville also has a greater share of single-family attached units (like townhomes and duplexes) than Clackamas County or the region.

Exhibit 13. Housing Mix in Wilsonville and Comparison Geographies, 2012-2016.

Source: U.S. Census Bureau, 2012-2016 ACS Table B25024.



Census Definitions for Housing Mix

Multifamily housing: “residential buildings containing units built one on top of another and those built side-by-side which do not have a ground-to-roof wall and/or have common facilities (i.e., attic, basement, heating plant, plumbing, etc.)”

Single-family attached: “each must be separated from the adjacent unit by a ground-to-roof wall in order to be classified as a single-family structure. Also, these units must not share heating/air-conditioning systems or utilities.

Units built one on top of another and those built side-by-side that do not have a ground-to-roof wall and/or have common facilities (i.e., attic, basement, heating plant, plumbing, etc.) are not included in the single-family statistics

Source: United States Census Bureau. New Residential Construction Definitions.
<https://www.census.gov/construction/nrc/definitions/index.html>

Until recently, the housing mix for new development has been evenly split between multifamily and single-family homes.

Historically, housing construction in Wilsonville has included multifamily units, single-family attached homes (townhomes), and single-family detached homes, with more units overall in apartments and townhomes. Between 2000 and 2012, Wilsonville permitted 2,862 housing units, two-thirds of which (1,892) were multifamily or single-family attached units.¹² These new developments include market-rate apartments and townhomes, senior living (both assisted and independent), and subsidized affordable housing (including some designated for seniors or others for people of all ages with disabilities). Most new home construction between 2014 and 2017 has been in the Villebois neighborhood, which is required to build about one third of the units as multifamily housing. Some of these units must come with affordability requirements under the City's development agreement with the State of Oregon, which allowed the former state hospital to be converted into a mixed-income neighborhood.¹³

Wilsonville's development code characterizes attached single-family units as multifamily: "Dwelling, Multiple Family: Three or more attached dwelling units located on a single tax lot. In the Village zone, such use also includes stacked flats or townhouses"

Source: City of Wilsonville

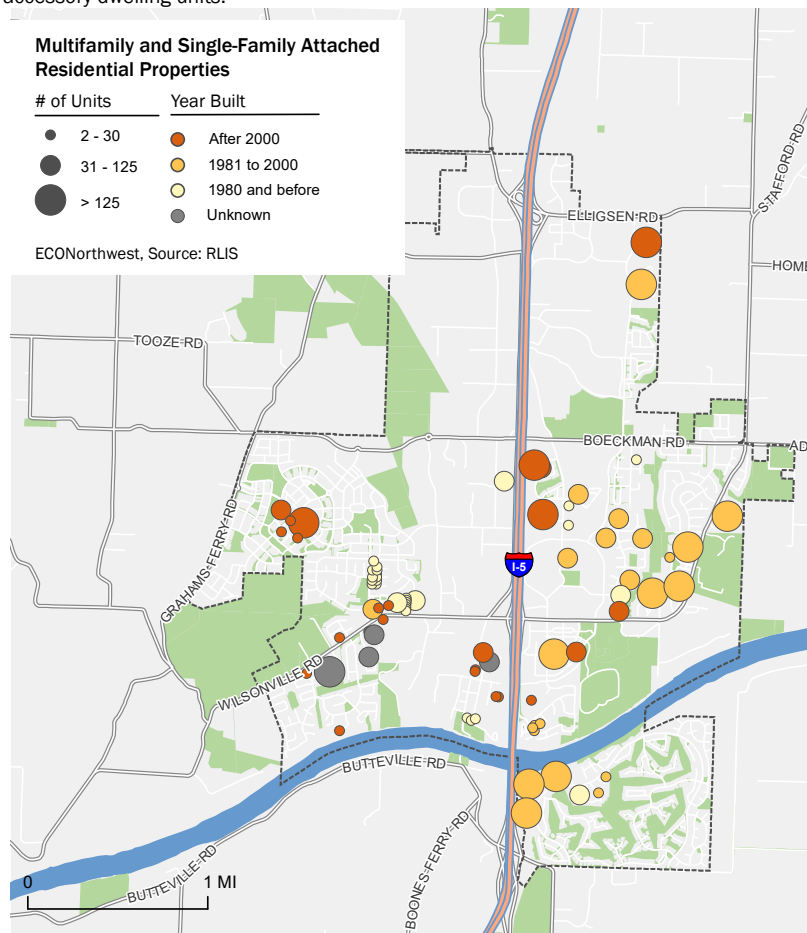
However, more single-family homes have been built in recent years. The construction of additional single-family units has helped to balance the city's overall housing inventory, which has been weighted towards multifamily homes. In 2016 and 2017, no multifamily units were permitted. In 2018, 70% of permits approved were for single-family homes, including attached and detached rowhomes, and 30% were for multifamily units.¹⁴

Wilsonville’s multifamily and single-family attached housing stock is well-distributed across the city, and close to services.

Metro’s Regional Land Information System (RLIS) data shows where the distribution of multifamily and single-family attached units are in the city. Exhibit 14 shows where multifamily units—both ownership and rental buildings—are located in Wilsonville as well as the age and relative size of each complex. Much of Wilsonville’s multifamily housing stock is concentrated near the Town Center, where the majority of housing was built between 1981 and 2000. Town Center has a concentration of services, shops, and amenities. Newer multifamily and single-family attached housing development is concentrated in Villebois and several complexes in the core of Wilsonville.

Exhibit 14. Distribution of Multifamily and Single-Family Attached Residential Units, Wilsonville, 2019

Source: Metro RLIS. Note: RLIS data includes multifamily unit types as well as single-family attached types like townhomes, duplexes, and accessory dwelling units.



The city has a limited stock of subsidized affordable housing.

About 11% of Wilsonville residents live in subsidized housing. As of 2018, Wilsonville had 449 subsidized, affordable units in 12 developments. The majority of these units are reserved for families; two developments are reserved for seniors. The subsidies and affordability regulations for these units come from programs such as the low-income housing tax credit and the City's tax abatement. These units serve residents making between 30% and 60% of area median income. Exhibit 15 shows the total number of subsidized units in Wilsonville as of 2018.

Exhibit 15. Government-Subsidized Affordable Housing, Wilsonville, 2018

Source: Oregon Housing and Community Services. Note: Two of these developments are accessible to residents through referral only (Rain Garden and Renaissance Court). This is because they serve residents with specific needs.

Development Name	Total Units	Total Affordable Units	Population Served
29875 SW Montebello Dr	1	1	Family
29885 SW Montebello Dr	1	1	Family
Autumn Park	143	140	Family
Beaver State - Montebello	50	41	Family
Charleston Apts	52	52	Family
Creekside Woods	84	44	Senior
Duck Country - Wilsonville Heights	24	24	Family
Hearthstone	5	5	Low income
Montecino	34	34	Family
Rain Garden	29	29	Low income, Referral Only
Renaissance Court	20	20	Low income, Referral Only
Wiedemann Park Apts	58	58	Senior
Totals	501	449	

Unregulated homes may be affordable to some renters, but prices are subject to market fluctuations. In these homes, rents are subject to market conditions, which generally means they have been increasing. There are no Wilsonville-based policies in place to preserve their affordability or protect tenants from displacement if they cannot afford a rent increase levied by their landlords. However, Senate Bill 608 was passed in 2019 which includes the following provisions:

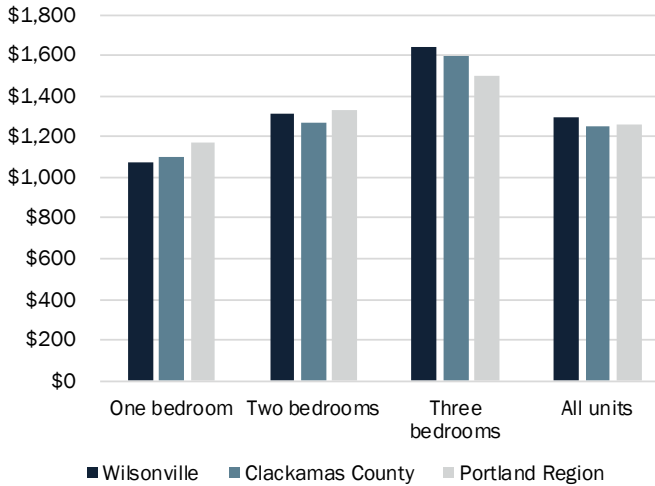
- Annual rent increases are limited to 7% plus the Consumer Price Index for the past 12 months. This applies to buildings over 15 years old.
- No-cause evictions are now limited to one of these four reasons:
 - Sale of the home to a new owner who will move-in
 - If the landlord or a family member will move-in
 - To address a significant repair or renovation of the unit
 - If the rental will no longer be used for residential use¹⁵

Wilsonville’s multifamily rental housing market trends mirror the Portland region.

On average, rents for one-bedroom units in Wilsonville are less than Clackamas County or the region, while larger units have similar or slightly higher rents than those in Clackamas County and the region.

Exhibit 16. Apartment Rents, by Bedroom Count, Wilsonville, Clackamas County, Portland Region, 2018.

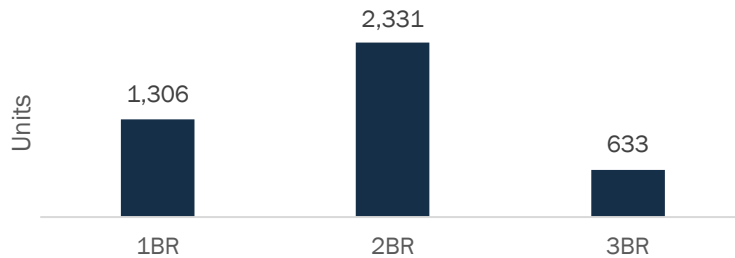
Source: CoStar.



Most multifamily rental housing units in the city are smaller one and two-bedroom units. Of 4,270 housing units in Wilsonville, about 31% have one bedroom, almost 55% have two, and only 15% have three.

Exhibit 17. Housing Unit Size, Wilsonville. 2019.

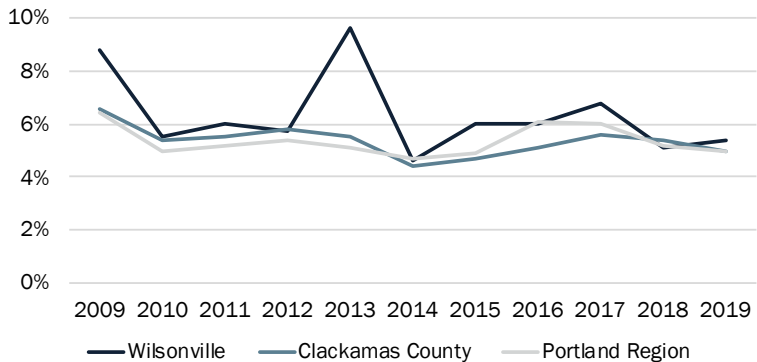
Source: CoStar



Multifamily vacancies in Wilsonville are average for the region. After some volatility during the recession, vacancy rates have settled at 5.4% in 2019, mirroring trends in the region, with vacancy rates of 5% for the Portland MSA and 4.8% for Clackamas County.

Exhibit 18. Multifamily Vacancy Rates in Wilsonville and Comparison Geographies, 2009-2019.

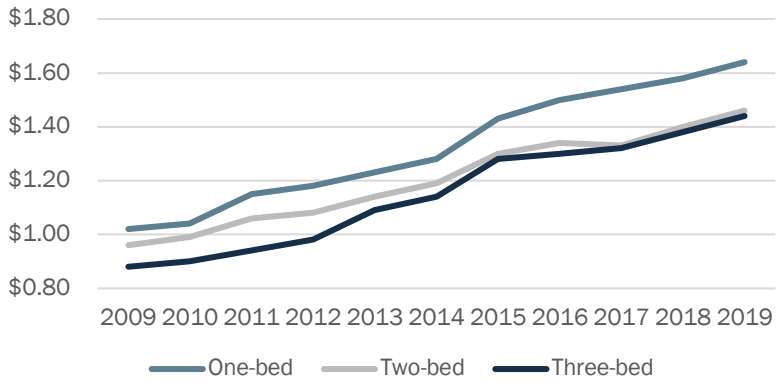
Source: CoStar



Apartment rents per square foot have been rising at similar rates across unit sizes. While one-bedroom apartments are still more expensive on a per square foot basis than larger units, the prices are rising at similar rates as for two- and three-bedroom apartments.

Exhibit 19. Wilsonville Apartment Rents per Square Foot, by Bedroom Count.

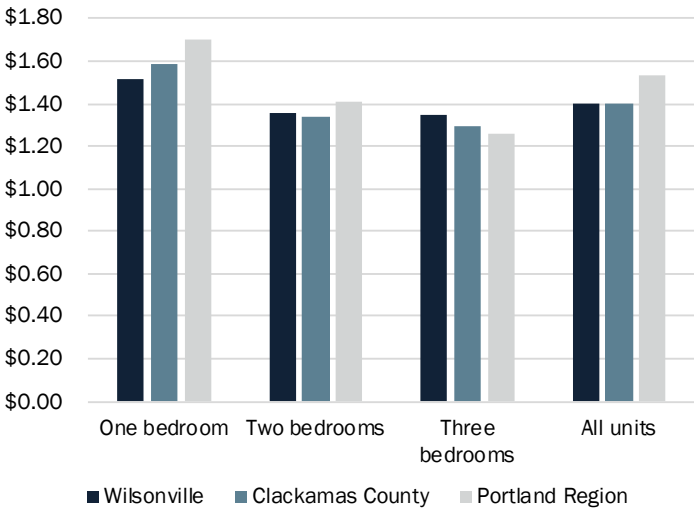
Source: CoStar.



Rents for Wilsonville’s one bedroom units are less expensive than the County or region, while three bedroom units are more expensive.

Exhibit 20. Apartment Rents Per Square Foot, by Bedroom Count, Wilsonville, Clackamas County, Portland Region, 2018.

Source: CoStar.

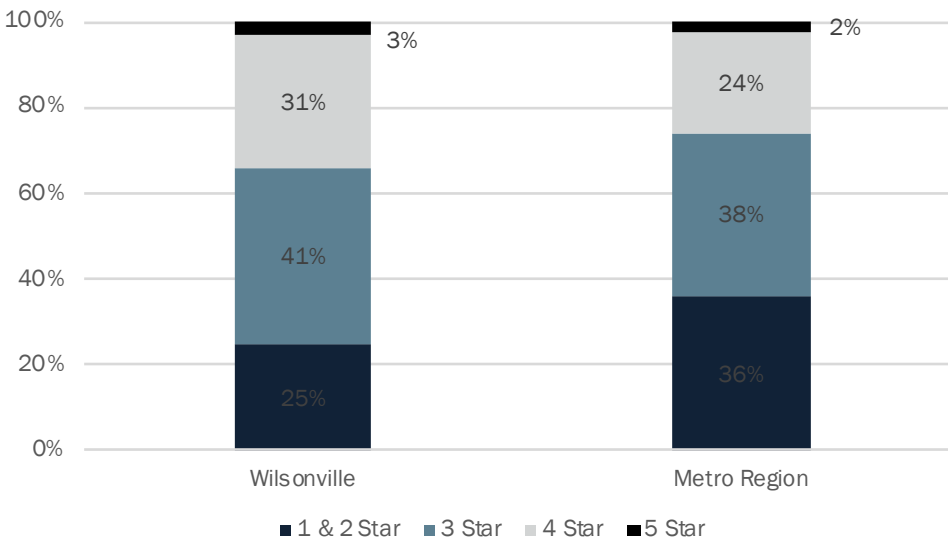


Wilsonville’s multifamily housing stock is relatively high-quality compared to the region.

According to CoStar—a multi-national commercial real estate information company—over one-third of Wilsonville’s multifamily housing stock is high-quality, compared to only one-quarter in the Portland region. This difference is mostly explained by the city’s relative lack of housing that CoStar¹⁶ rates as lower-tier.

Exhibit 21. Costar Quality Ratings for Multifamily Buildings in Wilsonville and Metro Region housing.

Source: CoStar.



Wilsonville’s higher quality multifamily housing stock results in higher rental prices compared with communities with a greater share of low-cost market rate rentals. On the other hand, Wilsonville may be less likely to see as much repositioning of its multifamily housing stock. This is the result of investors buying low-cost apartment complexes, making improvements, and increasing the rents at higher than average market rates.

Many residents cannot afford their housing costs.

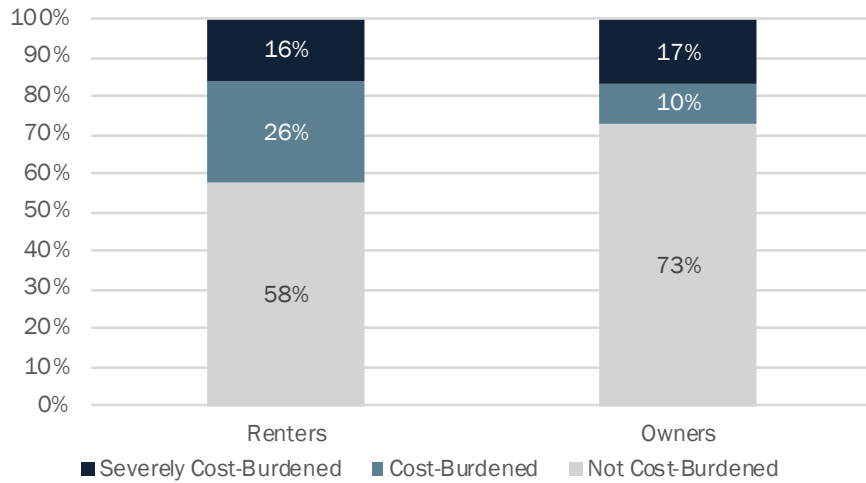
Many residents are paying more than 30% of their income on housing. Almost a quarter (23%) of all households in Wilsonville are cost-burdened, defined as spending more than 30% of their income on housing costs. Renters are particularly impacted: 42% are cost-burdened or extremely cost-burdened (spending more than 50% of their income on housing costs).

Low-income households are particularly likely to be cost-burdened.

Cost burden is a particularly pressing issue amongst renters. Disparities in income between current residents who rent and own their homes exacerbate the issue of housing cost burden, as renters have less income to begin with and are also paying too much of these limited resources on housing costs.

Exhibit 22. Housing Cost Burden in the City of Wilsonville by Tenure, 2012-2016

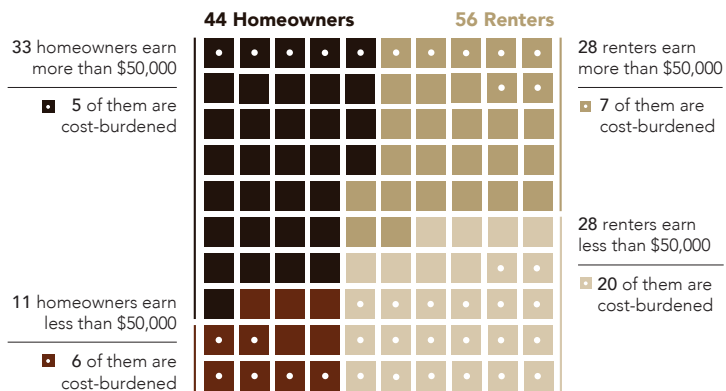
Source: U.S. Census Bureau, 2012-2016 ACS Table B25091 and B25070.



Almost **8 of 10 households** that earn less than \$50,000 per year in Wilsonville are cost-burdened.¹⁷

Exhibit 23. Illustration of Cost Burden if all of Wilsonville's Households were 100 Residents

Source: U.S. Census Bureau, 2012-2016 ACS Table S2503.



Rents are relatively less affordable in Wilsonville than in Clackamas County.

When comparing household incomes to the median rent, Wilsonville's rental housing stock is relatively more expensive than the county as a whole.

A household can start to afford Wilsonville's median rents at about 70% of Wilsonville's median household income (\$44,167).

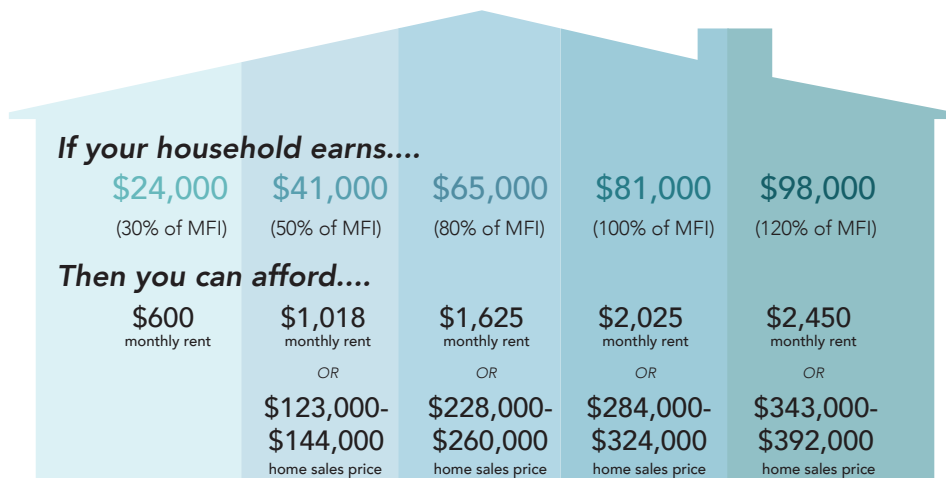
A household can start to afford Clackamas County's median rents at about 61% of County median household income (\$41,349).

Low-income households have very few options for either homeownership or rental. Exhibit 24 provides an overview of what households at different incomes can afford in terms of monthly rent or home sales price. It also provides examples of annual salaries for different job types that fall into each income bracket.

Wilsonville's residents are dissatisfied with the availability of reasonably-priced housing. The City's 2018 Community Survey concluded that only 38% of residents rated the availability of affordable quality housing as excellent or good, down from 47% in 2014.

Exhibit 24. Financially Attainable Housing, by Median Family Income (MFI) for Clackamas County (\$81,400), Clackamas County, 2018

Source: U.S. Department of Housing and Urban Development 2016. U.S. Census Bureau, 2012-2016 ACS Table 19001, Bureau of Labor Services, Portland MSA, 2018, Note: MFI is Median Family Income, determined by HUD for Clackamas County.

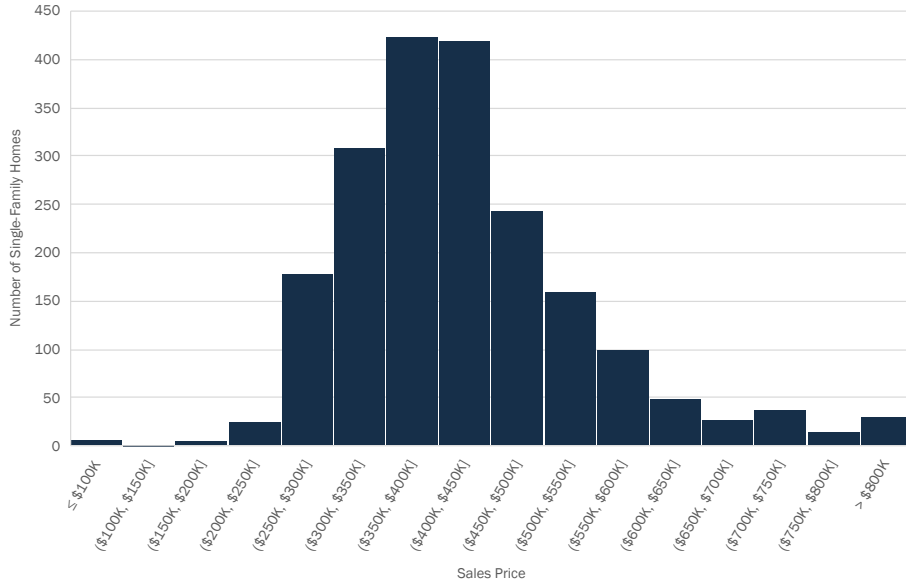


Homeownership is out of reach for many of Wilsonville’s current residents.

In the past five years, Wilsonville saw few single-family homes sell below \$300,000. Just 10% of homes sold for under \$300,000.

Exhibit 25. Single-Family Home Sales Price Distribution, Wilsonville, 2015-2019

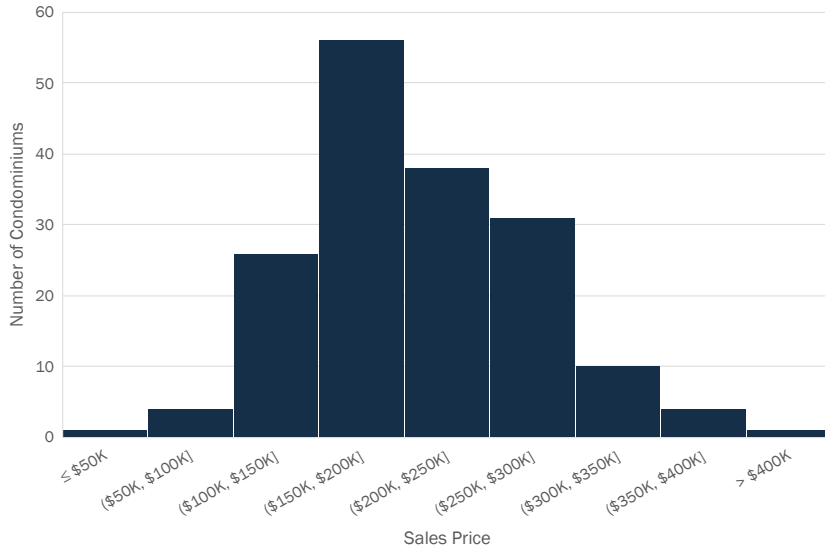
Source: Oregon Metro, Taxlots data, 2015-2019. N = 2,034. Includes single-family detached and attached housing types.



Condominiums had somewhat lower sales prices, with most selling for under \$300,000. However, there were only 171 sales of condos over the past five years.

Exhibit 26. Condominium Sales Price Distribution, Wilsonville, 2015-2019

Source: Oregon Metro, Taxlots data, 2015-2019. N = 171



A family making the median income for a renter household (\$50,406) could afford homes valued between about \$221,000 to \$252,000 (based on a range of financing assumptions).

However, the median home sales price in the city was almost double, at \$454,500, in February 2019.¹⁸

A household can start to afford the median home sales price (\$454,500), at:

Wilsonville:
185%
of Wilsonville's
median household income
(\$116,550).

Clackamas County:
152%
of County
median household income
(\$105,000).

In addition to high home sales prices, there are ongoing costs of homeownership. Most residential neighborhoods in Wilsonville have an homeowners association (HOA), which levies fees that can add to housing costs. An HOA is an organization in a subdivision, planned community or condominium that makes and enforces rules for properties. Those who purchase a house within an HOA's jurisdiction become members and must pay dues. These costs can add hundreds of dollars to monthly housing costs.

Wilsonville has few starter homes, which means would-be homeowners may be renting for longer.

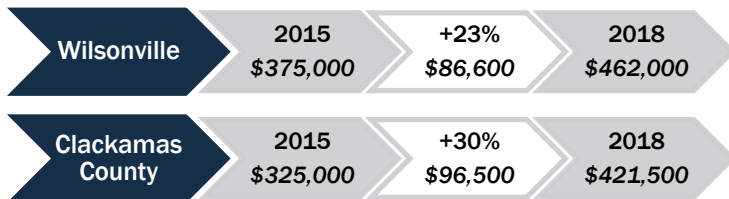
Homeownership is generally out of reach for most first-time buyers. The median housing sales price in September 2018, \$462,000, indicates that few entry-level homes are available for sale in Wilsonville. Prospective homeowners are likely renting for a longer period of time, perhaps bypassing the starter home stage and seeking instead to buy a “forever” home. This can be due to the many costs of acquiring a home, primarily the down payment and closing costs.

The average home in Wilsonville costs 31% more than what the average household can afford.¹⁹

Despite high home costs in Wilsonville, prices are increasing at a slower rate than in the County. From 2015 to 2018, the median home price increased only 23% in Wilsonville compared to 30% in Clackamas County.

Exhibit 27. Median Home Prices in Wilsonville and Clackamas County, 2015-2018.

Source: Property Radar.



An entry-level home, or starter home, is a home accessible to a first-time homebuyer, often smaller and on the less expensive side of the market. Trulia defines a starter home as one priced in the lowest third of the local market, which in Wilsonville's case is up to about \$350,000 as of 2019. Typically, starter homeowners trade up to a bigger home in about five years.

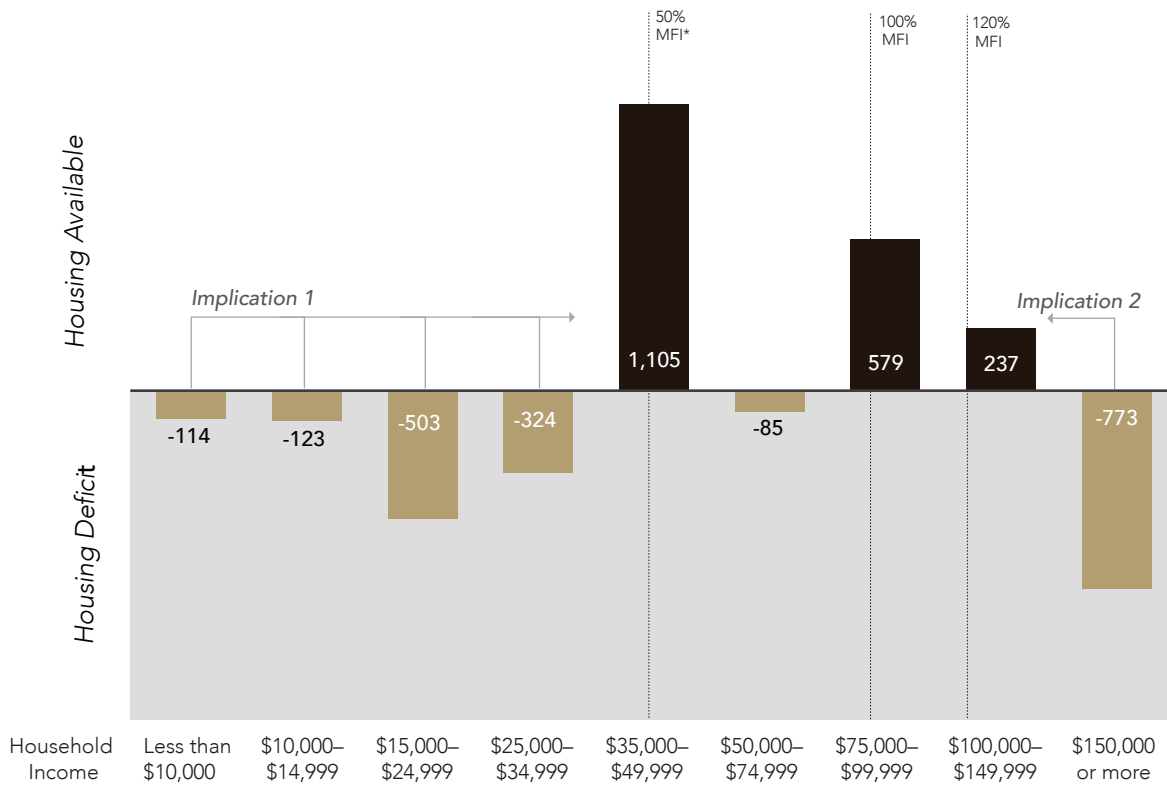
Overall, there is little housing affordable to those at the low end of the income spectrum.

Wilsonville currently has a deficit of housing for households earning less than \$35,000. The housing types that Wilsonville has a deficit of are more affordable housing types such as apartments, duplexes, tri and quad-plexes, manufactured housing, and small, clustered single-family detached housing (e.g. cottages).

Exhibit 28 compares the number of households by income level with the number of units affordable to those households in cities within Clackamas County. Many lower-income households are living in expensive homes because of a deficit in units that they can afford (**Implication 1**). On the other end of the spectrum, some higher-income households are spending less than they could afford on housing, either because of preference, the timing of when they started renting or owning their home, or because of a lack of high-end housing stock (**Implication 2**). The pattern is similar for low-income households in Clackamas County.²⁰

Exhibit 28. Housing Costs and Units by Income Level, All Households, Wilsonville, 2018.

Source U.S. Census Bureau, 2012-2016 ACS. Note: MFI is Median Family Income, determined by HUD for the Portland MSA.



5 What types of housing will future residents need?

In the future, Wilsonville will need a wider range of housing types and price points.

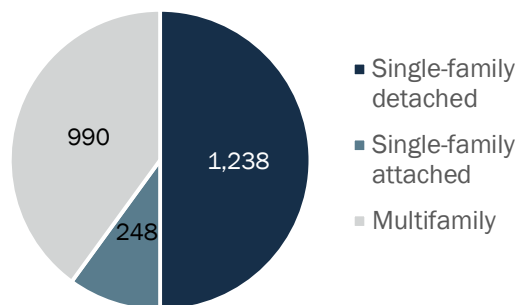
Over the next 20 years, the city will need a **wide range of housing types** and **housing that is affordable to households at all income levels** to accommodate an estimated 3,373 new residents by 2039. This conclusion is consistent with housing need in other cities in Clackamas County, the Portland Region, and most cities across the state.

This need largely originates in above-described demographic changes, where **Baby Boomers**, **Millennials**, and **Latinx families** will be increasingly important groups seeking housing. All three groups seek **affordable housing options, but may have different requirements for unit types and sizes**. Housing needs and preferences change for households in predictable ways over time, such as with changes in marital status, age, and size of family. However, income is the biggest driver of housing type choice. Both single-family attached and multifamily units will likely appeal to the growing demographic groups because they are less expensive and easier to maintain than single-family detached homes.

It is projected that Wilsonville will have demand for 2,476 new dwelling units over the next 20 years, and Wilsonville has land capacity for 2,377 units over that same period (not including the recently expanded UGB area of Frog Pond South and East).¹

Exhibit 29. Forecast of demand for new dwelling units, Wilsonville Planning Area, 2019 to 2039

Source: Calculations by ECONorthwest



¹ The HNA's forecast for Frog Pond East and South is based on Metro Ordinance 18-1427¹ which says Wilsonville must plan for a minimum of 1,325 dwelling units in Frog Pond East and South. However, this area was not included within the HNA's housing growth in the forecast for Wilsonville Planning Area because this UGB expansion was not yet acknowledged by the Land Conservation and Development Commission at the time of publication.

Exhibit 30. Implications for Future Housing Types from Increased Population Growth and Demographic Changes

Source: Population Research Center and ECONorthwest.

Future Trends	What could this mean for future housing types?
A growing city.	<ul style="list-style-type: none"> • To accommodate these new households, an average of 124 new units will need to be built each year.
More middle-aged Millennials.	<ul style="list-style-type: none"> • Homeownership rates for Millennials will increase as they continue to form their own households. • There will likely be increased demand for relatively affordable housing types, including ownership and rental types, over the next 20 years. • Some older Millennials with families may become empty nesters who need smaller units. Others may want housing to accommodate a three-generation family. <p><i>Source: Clackamas County HNA (page 54 and page 315)</i></p>
A relatively constant share of people 60+.	<ul style="list-style-type: none"> • The aging of the Baby Boomers may have a smaller impact in Wilsonville than in some cities in the County because Wilsonville has a smaller share of people over 60 years of age. • The city will be affected by retirement and changing housing needs of seniors as their households get smaller and their lifestyles change. • While most Baby Boomers prefer to stay in their current homes as long as possible, some Baby Boomers may choose to downsize into smaller homes and seek homes where they can age in place (often single-story with easy access to services and amenities). • Due to health or other issues, some Baby Boomers may become unable to stay in their current homes and will choose to live in multigenerational households or assisted-living facilities (at various stages of the continuum of care). <p><i>Source: Clackamas County HNA (page 53 and page 315)</i></p>
A steady or increasing share of Latinx households.	<ul style="list-style-type: none"> • Continued growth in Latinx households will increase need for larger units (to accommodate larger, multigenerational households) and relatively affordable housing. <p><i>Source: Clackamas County HNA (page 316)</i></p>

The key finding from the data above is that Wilsonville will need to continue to offer a diverse array of housing types, at a range of price points. Given decreases in average household sizes and a stable to increased share of older households, there will be more demand for smaller, attached housing types and multifamily housing.

Wilsonville has diverse housing types and is planning for a mix of unit types in its growth areas.

Much of the current residential growth in Wilsonville is taking place in the Villebois neighborhood on the west side of I-5, but a handful of other smaller pockets of development are under construction as well. Primary future growth areas for the community include the Frog Pond and Town Center Planning Areas, which are both on the east side of I-5.

This section summarizes information from the Clackamas County Baseline Housing Needs Analysis (2019) and the Wilsonville Baseline Housing Needs Analysis (2019), which is included in Appendix A.

Key Growth Areas

Frog Pond

Development of Frog Pond, an area designated to transition from rural to urban development, will take time, given the need to extend utilities and build infrastructure to serve houses. Engineering and construction plans for Frog Pond West are underway, with an expectation that the first homes will be available starting in 2019. Frog Pond West will include mostly single-family detached housing types, with some single-family attached units. The rest of the Frog Pond Area—Frog Pond South and East—is expected to contain some attached housing and cottage clusters, with the majority of the Frog Pond Area planned for single-family detached housing. Timing for moving forward on Frog Pond South and East is not entirely known, but, following master planning of this area, it is expected that building of the first homes in the area will not likely begin until after 2024.²¹ Ultimately, infrastructure extensions, market response to Frog Pond West, and overall housing demand will determine the timing for Frog Pond South and East.

The forecast for Frog Pond East and South is based on Metro Ordinance 18-1427, which says Wilsonville must plan for a minimum of 1,325 dwelling units in Frog Pond East and South. However, the Baseline HNA for Wilsonville did not include Frog Pond East and South housing growth in the forecast for Wilsonville Planning Area because this UGB expansion has not yet been acknowledged by the Land Conservation and Development Commission.

Town Center

The Wilsonville Town Center area is already built, but there is a newly adopted plan that anticipates infill and redevelopment of much of the area that could result in up to 880 new units within a 20-year timeframe. Almost all of the new housing in the Town Center is expected to be attached single family or multifamily housing, much of which will be co-located with retail and office uses in modern, mixed-use buildings. Timing for the infill and redevelopment will be determined by private property owners, their business plans, and market demand for a more urban living experience in the center of Wilsonville.

Villebois

On the west side of the city, Villebois is a mixed-use community that contains single-family detached housing, single-family attached housing, duplexes, row houses, multifamily housing, and cluster housing. Villebois will be nearing full build-out in the next few years.

Other Neighborhoods

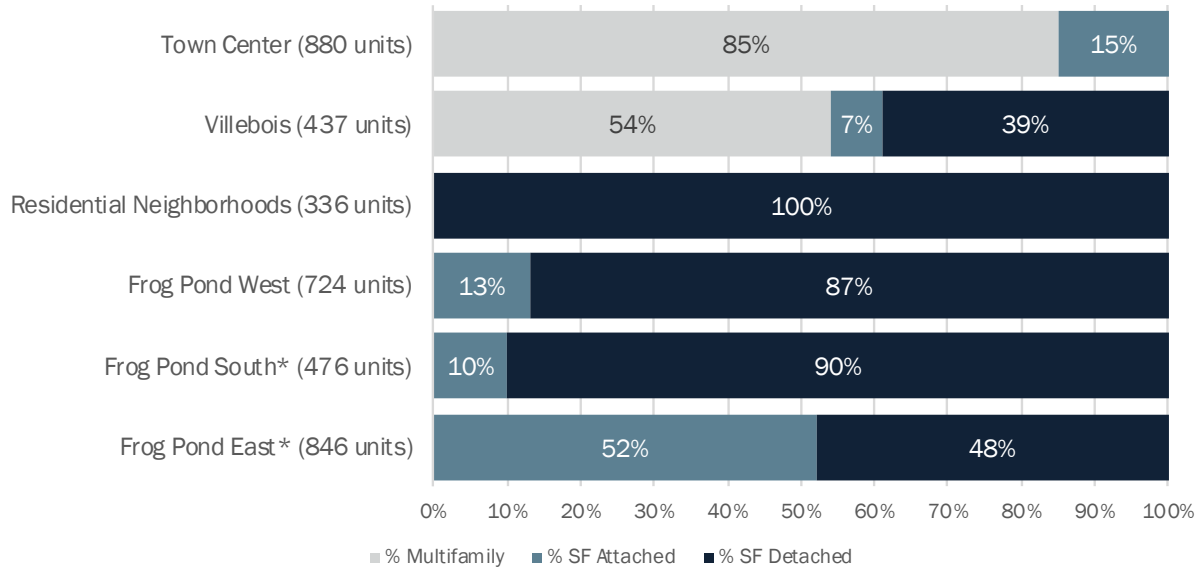
Infill may be possible in some areas outside of Villebois, the Town Center, and the UGB expansion areas. There could be an opportunity for accessory dwelling units, but most neighborhoods are planned developments with Covenants, Conditions, and Restrictions that could make infill more challenging.

Summary of Capacity by Neighborhood

In 2019, the City of Wilsonville received a baseline Housing Needs Analysis as part of a broader project to assess housing needs across Clackamas County (for details, see Appendix A). It is expected that most new homes will be built in the existing neighborhoods of Villebois and Town Center, and the new Frog Pond West growth area. The analysis also assumes that vacant residential land in other existing Residential Neighborhoods will be built, at historical densities, over the next 20 years.²² Exhibit 31 provides a graphical summary of the capacity within Wilsonville planning areas that was included in the Housing Needs Assessment.

Exhibit 31. Summary of Estimated Capacity and Housing Mix within Wilsonville Planning Areas, 2019 to 2039

Source: Buildable Lands Inventory; Frog Pond Concept Plan (2015), Wilsonville Staff, Calculations by ECONorthwest.
 Note: Capacity matches demand in Villebois, Town Center, and Frog Pond West. Land in Residential Neighborhoods includes vacant and partially vacant land. For this housing market research report, we have added in calculations for Frog Pond South and East. For a map of these areas, see page 4 of Appendix A: Wilsonville Baseline Housing Needs Analysis.



* Not included in Baseline HNA Calculations.

6 Conclusion

This housing market research report provides a compendium of information to City leadership to support future decision making for the Equitable Housing Strategic Plan. The analysis found that the City has proactively planned for a mix of housing types across its planning areas, but increasing rents and home sales prices in the Portland region continue to exacerbate affordability in Wilsonville. The City is expected to grow by over 3,000 people in the next 20 years, many of whom will be interested in diverse, affordable housing types. These issues point to a need for a proactive roadmap toward achieving more equitable housing now and into the future.

The Plan will build on this base of information to identify implementation actions that the City should take to address current housing issues and plan for future housing. In future phases of the work, the City should take the following considerations into account:

- **Affordability Considerations.** Housing prices are a regional issue that also must be addressed at the local scale. Many residents in the city are paying more than 30% of their income towards housing. This is especially true for lower income renters. Contributors to development costs such as parking requirements, on-site amenities, extending water and sewer lines into new growth areas, and escalating construction costs have significant implications as to what housing types get built and where the rent or sales price needs to be set. Similarly, residents' incomes are not keeping pace with rising housing costs. Many residents who would like to own a home struggle to save enough to cover down payment and closing costs, and avoid being cost-burdened by the mortgage payment, insurance and property taxes, and monthly homeowners association fees.
- **Unit Type Considerations.** The demographic changes that Wilsonville will see over the next 20 years point to a need for planning a broad range of housing types for owners and renters with a wide range of price points. This conclusion is consistent with housing need in other cities in Clackamas County, the Portland Region, and most cities across the state. Compared to the rest of the county, Wilsonville has done a commendable job of promoting a diversity of housing types in the past, but recent trends point to a growing production of single-family detached units. Going forward, Wilsonville will need to continue to ensure a range of housing types are developed, such as small single-family detached housing (e.g., small-lot single-family and cottage clusters), townhouses, duplexes and quad-plexes, and apartments. Wilsonville is planning for these housing types in areas like Villebois and Town Center. However, in the Town Center, it will take time before market conditions improve for mixed-use multifamily development and the implementation of the Town Center Plan. The Frog Pond Planning Area includes new single-family attached types, which will meet an important need among future residents. Going forward, Wilsonville will need to ensure that these plans and their goals are fully implemented.

- **Access to Services, Amenities, and Transit.** Given Wilsonville’s relatively small size, much of Wilsonville’s housing is within easy reach of services, amenities, and transit. However, new planning areas are located farther from the city’s core and existing city services and amenities. Frog Pond West is planned to develop as predominately single-family detached neighborhoods, without the addition of retail amenities or services. The Town Center is the city’s commercial core with unrealized capacity to develop into a dynamic, amenity-rich center that could appeal to growth populations – Millennials, Baby Boomers, and Latinx populations.
- **Structural Considerations.** Finally, Metro notes that “Equitable housing also represents a system that accounts for the needs of households with low income and communities of color, recognizes a history of housing discrimination, and complies with current state and federal fair housing policy.”²³ ECONorthwest and its partners will be conducting stakeholder outreach to uncover findings related to the structural gap – how welcome do people feel in Wilsonville’s housing market? What kinds of barriers to people have in getting financing or making a security deposit? Have people encountered discrimination when looking for or locating in a home? Addressing these structural issues is important to achieving a balanced plan that meets the needs of Wilsonville’s diverse residents.

The Equitable Housing Strategy Plan should seek to address each of these considerations. The consultant team will use the research along with findings from the stakeholder outreach to develop a set of implementation actions in the final Equitable Housing Strategic Plan.

Appendix

Appendix A: Wilsonville Baseline HNA

This memorandum serves as Wilsonville’s preliminary baseline HNA, as an update to the HNA completed by the City in 2014.

¹ 2018 Wilsonville Annual Housing Strategy

² Geigerich, Andy. "List Leaders: These are Oregon's 15 fastest-growing cities." Portland Business Journal. May 13, 2019. <https://www.bizjournals.com/portland/news/2019/05/13/list-leaders-these-are-oregons-15-fastest-growing.html>

³ Current Population Survey Definitions. United States Census Bureau.

<https://www.census.gov/programs-surveys/cps/technical-documentation/subject-definitions.html>

⁴ U.S. Census Bureau. 2019. LEHD Origin-Destination Employment Statistics (2002-2015). Washington, DC: U.S. Census Bureau, Longitudinal-Employer Household Dynamics Program, accessed on June 20, 2019 at <https://onthemap.ces.census.gov>. LODES 7.3. The latest Census data available on commute patterns are from 2015.

⁵ The Oregon Department of Education Child Nutrition Programs provides income guidelines by household size for free and reduced price meals for students in schools. In 2016-2017, students qualified for free lunch at the following income levels: 2 people (\$20,826), 3 people (\$26,208), 4 people (\$31,590). Students qualified for reduce lunch prices at the following income levels: 2 people (\$29,637), 3 people (\$37,296), 4 people (\$44,955).

⁶ 2018 Wilsonville Annual Housing Report.

https://www.ci.wilsonville.or.us/sites/default/files/fileattachments/community_development/page/29051/housing_report_pdf_version.pdf

⁷ Wilsonville Housing Needs Assessment, 2019.

⁸ Clackamas County Baseline Housing Needs Assessment, 2019. Page 73.

⁹ https://www.oregonmetro.gov/sites/default/files/2018/12/03/2018_UGR-summary-11282018_v2pdf.pdf

¹⁰ Portland Region Housing Needs Assessment.

<https://www.oregonmetro.gov/sites/default/files/2018/12/04/Appendix5A-HousingNeedsAnalysis.pdf>

¹¹ Clackamas County Baseline Housing Needs Assessment, 2019.

¹² Wilsonville Residential Land Study

¹³ Villebois Village Master Plan.

https://www.ci.wilsonville.or.us/sites/default/files/fileattachments/planning/page/84681/villebois_village_master_plan.pdf.

¹⁴ 2018 Wilsonville Annual Housing Report

¹⁵ <https://olis.leg.state.or.us/liz/2019R1/Downloads/MeasureDocument/SB608/Introduced>

¹⁶ The CoStar Building Rating System provides a national rating for buildings. Properties are evaluated and rated using a 5-star scale based on the characteristics of each property type, including: architectural attributes, structural and systems specifications, amenities, site and landscaping treatments, third party certifications and detailed property type specifics. More information on CoStar's website:

https://www.costar.com/docs/default-source/brs-lib/costar_buildingratingsystem-definition.pdf?sfvrsn=12a507a4_2

¹⁷ 2018 Wilsonville Annual Housing Report.

¹⁸ Redfin, Property Radar.

¹⁹ 2018 Wilsonville Annual Housing Report.

²⁰ Clackamas County Baseline Housing Needs Assessment, 2019. See Exhibit 67 on page 75.

²¹ In addition to the capacity in the areas mentioned above, Frog Pond East and South are new additions to the Metro Urban Growth Boundary with housing expectations defined in Metro's growth boundary (refer to Metro Ordinance 18-1427 at <http://rim.oregonmetro.gov/Webdrawer/Record/558717>). The growth decision says Wilsonville must plan for a minimum of 1,325 dwelling units in Frog Pond East and South. However, as of June 2019, this UGB expansion has not yet been acknowledged by the State of Oregon Land Conservation and Development Commission. Therefore, ECONorthwest has not included Frog Pond East and South housing growth in the forecast for Wilsonville.

²² Assumption for future mix is based on requirements from OAR 660.007. OAR 660-007-0030(1) requires "(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."

²³ "Opportunities and Challenges for Equitable Housing." Metro. 2016.

<https://www.oregonmetro.gov/sites/default/files/2016/01/28/EquitableHousingReport-20160122.pdf>



DATE: June 27, 2019
TO: Miranda Bateschell, City of Wilsonville
FROM: Beth Goodman and Sadie DiNatale, ECONorthwest
SUBJECT: WILSONVILLE BASELINE HOUSING NEEDS ANALYSIS

Clackamas County is developing a Housing Needs Analysis (HNA).¹ The purpose of the HNA is to provide information to the County about Clackamas County's housing market and to provide a basis for updating the County's housing policies. The project also provides participating cities in Clackamas County with a baseline housing needs analysis.

This memorandum serves as Wilsonville's preliminary baseline HNA, as an update to the HNA completed by the City in 2014.² The City can use the information in the Clackamas County HNA and the information in the City's baseline housing needs analysis as the basis for developing a full housing needs analysis. The preliminary HNA provides information to staff and decision makers about the characteristics and conditions of the city's housing market and serves as a starting point for further evaluation of the city's housing needs and housing policies.

Organization of this Memorandum

The contents of this memorandum include the following sections:

- Buildable Lands Inventory Results
- Baseline Housing Forecast
- Baseline Assessment of Residential Land Sufficiency
- Conclusions

In addition, Appendix B of the Clackamas County HNA provides the factual basis for the analysis in the baseline housing needs analysis.

Buildable Land Inventory Results

This section provides a summary of the residential buildable lands inventory (BLI) for the Wilsonville planning area, which includes the city limits and the Frog Pond West area. This buildable land inventory analysis complies with statewide planning Goal 10 policies that govern planning for residential uses. This section presents a summary of vacant and partially vacant land in Wilsonville that excludes land with constraints that limit or prohibit

¹ This project is funded through a grant from the Oregon Department of Land Conservation and Development (DLCD).

² *Wilsonville Residential Land Study: Technical Report*, May 2014, ECONorthwest

development, such as slopes over 25% or floodplains. **The full results of the Buildable Land Inventory and the methodology are presented in detail in Appendix A.**³

Wilsonville has 1,920 acres of residentially zoned land. Exhibit 1 shows that Wilsonville has 186 unconstrained vacant acres in designations that outright allow housing, including in Town Center. About 46% of Wilsonville’s unconstrained buildable residential land is vacant and 54% are in tax lots classified as partially vacant.

Note: Residential Neighborhood is Frog Pond West and Village is Villebois.

Exhibit 1. Unconstrained buildable acres in vacant and partially vacant tax lots by Plan Designation, Wilsonville city limits, 2019

Source: ECONorthwest Note: The numbers in the table may not sum to the total as a result of rounding.

Generalized Plan Designation	Total buildable acres	Buildable acres on vacant lots	Buildable acres on partially vacant lots
Residential			
0-1 du/ac	3	0	3
2-3 du/ac	1	0	1
4-5 du/ac	6	0	6
6-7 du/ac	25	20	5
10-12 du/ac	20	18	1
16-20 du/ac	0	0	0
Residential Neighborhood	100	15	84
Village	24	24	0
Town Center			
Town Center	7	7	0
Total	186	85	100

³ Appendix A of the Clackamas County Housing Needs Analysis provides an overview of the structure of the buildable land (supply) analysis based on the DLCD HB 2709 workbook “Planning for Residential Growth – A Workbook for Oregon’s Urban Areas,” which specifically addresses residential lands. Appendix A also discusses the buildable lands inventory methods and definitions, consistent with Goal 10/OAR 660-008.

Exhibit 2 shows buildable acres by size of parcels (e.g., acres in tax lots after constraints are deducted) for vacant and partially vacant land by Plan Designation. Of Wilsonville's 186 unconstrained buildable residential acres, about 89% are in tax lots larger than one acre.

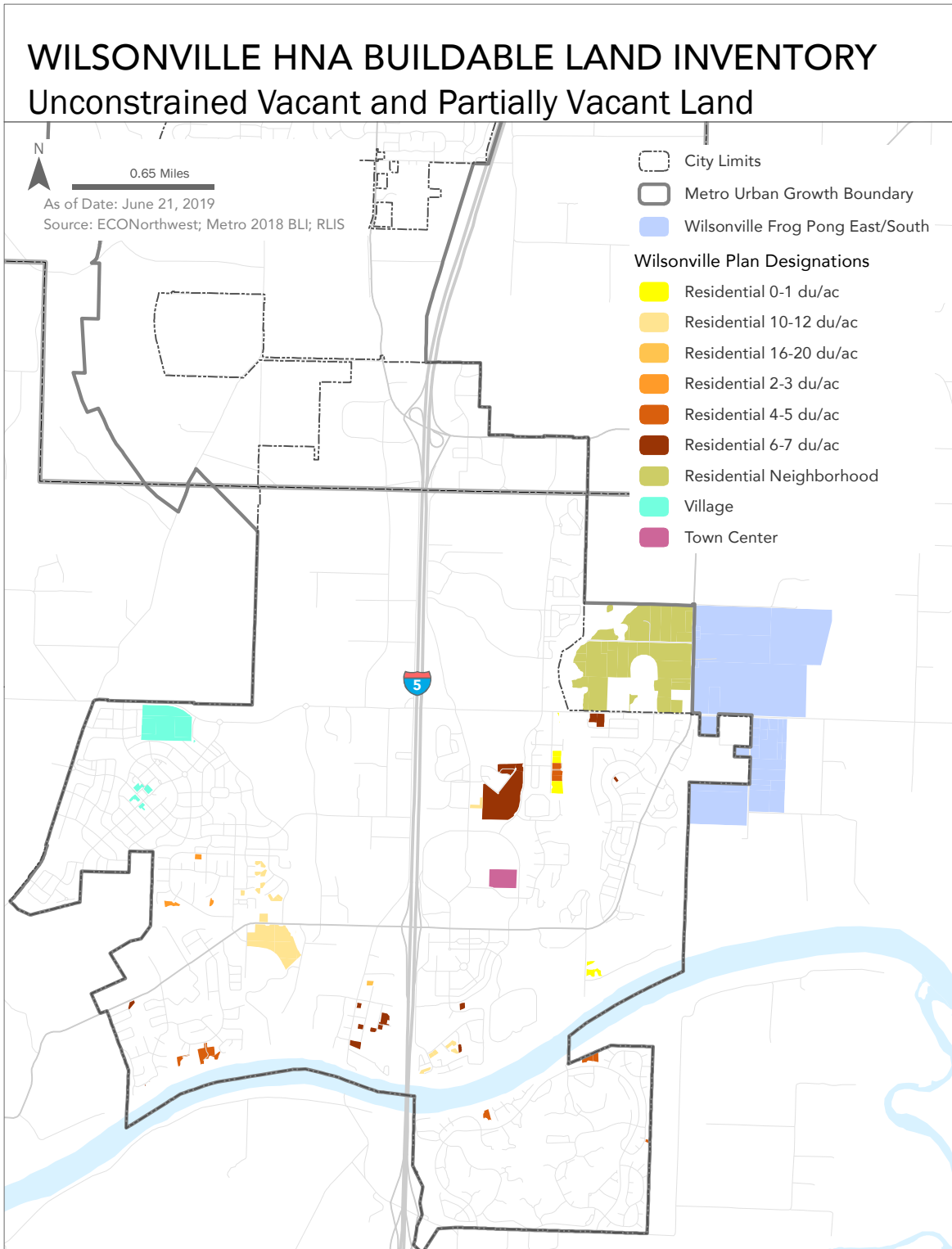
Exhibit 2. Unconstrained buildable acres, by size of parcel, in vacant and partially vacant tax lots by Plan Designation, Wilsonville city limits, 2019

Source: ECONorthwest Note: The numbers in the table may not sum to the total as a result of rounding.

Generalized Plan Designation	Total buildable acres	Buildable acres on vacant lots	Buildable acres on partially vacant lots
Residential			
0-1 du/ac	3	0	3
2-3 du/ac	1	0	1
4-5 du/ac	6	0	6
6-7 du/ac	25	20	5
10-12 du/ac	20	18	1
16-20 du/ac	0	0	0
Residential Neighborhood	100	15	84
Village	24	24	0
Town Center			
Town Center	7	7	0
Total	186	85	100

Exhibit 3 shows the results of Wilsonville's BLI by plan designation and by plan designation and planned density range.

Exhibit 3. Vacant and Partially Vacant Residential Land by Plan Designation with Constraints, Wilsonville, 2019



Over the 20-year study period, some lots with existing development are likely to redevelop within new buildings. To account for the development capacity on these developed lots, Metro identifies a subset of developed lots as “redevelopable”. Metro has created two “filters” to identify lots with the potential to redevelop.⁴

- **Threshold Method.** This method identifies lots where redevelopment would result in a net increase of 50% more than the current number of units on the site. The method uses property value thresholds where it is economically viable for a lot to redevelop at this intensity. For suburban areas in the regional UGB the threshold is \$10 per square foot of property value for multifamily structures and \$12 per square foot for mixed use structures. If a lot’s current property value is below these thresholds, it is assumed to have the potential to redevelop.
- **Historic Probability Method.** This method determines the probability of a lot redeveloped based on a statistical analysis of lots that historically redeveloped within the region. The probability for each lot is multiplied by the total zoned capacity of the lot to determine the likely future residential capacity.

For the Wilsonville BLI, ECONorthwest used the estimate of redevelopable units on *developed* lots, as identified based on the Threshold Method, which is based on discussion with Metro staff. The analysis of redevelopment potential in Exhibit 4 does **not** take into account the City redevelopment plans for Town Center, as documented in the Town Center Plan, adopted in 2019.

Exhibit 4. Potential redevelopment capacity by plan designation, Wilsonville city limits, 2019

Source: ECONorthwest Note: The numbers in the table may not sum to the total as a result of rounding.

Generalized Plan Designation	Estimated Redevelopment Units
Residential 0-1 du/ac	-
Residential 2-3 du/ac	3
Residential 4-5 du/ac	18
Residential 6-7 du/ac	67
Residential 10-12 du/ac	282
Residential 16-20 du/ac	-
Village	664
Town Center	8
Total	1,042

⁴ Oregon Metro. Appendix 2: Buildable Lands Inventory. November 21, 2018.

https://www.oregonmetro.gov/sites/default/files/2018/12/03/Appendix2-BuildableLandsInventory_12032018.pdf

Note, the capacity of partially vacant lots (where the lot could be further developed under current development standards without demolishing existing structures) is accounted for in the unconstrained buildable acres.

Baseline Housing Forecast for 2019 to 2039

The purpose of Wilsonville's housing forecast is to estimate future housing need in Wilsonville to provide the basis for additional analysis of housing need and discussions about housing policies.

The baseline housing needs analysis is based on: (1) Metro's official population forecast for household growth in Wilsonville over the 20-year planning period, (2) information about Wilsonville's housing market, and (3) the demographic composition of Wilsonville's existing population and expected long-term changes in the demographics of Clackamas County. **This analysis pulls information about Wilsonville's demographic and socioeconomic characteristics and housing market from Appendix B Housing Trends.**

Forecast for Housing Growth

A 20-year household forecast (in this instance for 2019 to 2039) is the foundation for estimating needed new dwelling units. Metro forecasts growth of new households and this analysis assumes one household is equal to need for one dwelling unit. The forecast for Wilsonville Planning Area is based the following geographies:

- **Wilsonville city limits.** Wilsonville's city limits will grow from 9,883 households in 2019⁵ to 11,635 households in 2039, an increase of 1,752 households.⁶ This forecast is based on Metro's *2040 Household Distributed Forecast, 2016*. It also includes the household forecast for TAZ 973 (the Coffee Creek area) of 24 new households, based on *Metro's 2040 TAZ Forecast, 2016*.⁷
- **Wilsonville's Urban Growth Boundary expansion area.** Frog Pond West will grow from 40 households in 2019 to 754 households in 2039, an increase of 714 households.

⁵ Metro's 2040 Household Distributed Forecast shows that in 2015 the Wilsonville's city limits had 9,553 households. The Metro forecast shows Wilsonville growing to 11,706 households in 2040, at an average annual growth rate of 0.82% for the 25-year period. Using this growth rate, ECONorthwest extrapolated the forecast to 2019 (9,869 households) and 2039 (11,611 households).

⁶ This forecast is based on Wilsonville's (city limits) official household forecast from Metro for the 2019 to 2039 period.

⁷ Per Jim Cser: Metro's *2040 Household Distributed Forecast, 2016* is based on the Portland State University city population estimates as of July 1, 2015. At the time of the forecast, TAZ 973 was not annexed into the city limits. Therefore, to account for annex today, ECONorthwest included the household forecast for TAZ 973 into the forecast for Wilsonville City limits.

The forecast for Frog Pond West is based on Metro's 2040 TAZ Forecast, 2016, which is different from the *Frog Pond West Master Plan*.⁸

- **Frog Pond East and South.** The forecast for Frog Pond East and South is based on Metro Ordinance 18-1427⁹ which says Wilsonville must plan for a minimum of 1,325 dwelling units in Frog Pond East and South. However, we do not include Frog Pond East and South housing growth in the forecast for Wilsonville Planning Area because this UGB expansion has not yet been acknowledged by the Land Conservation and Development Commission.

While the forecast in Exhibit 5 is a forecast for new households, we assume that each household will need a dwelling unit. The new 2,476 households in Exhibit 5 will result in a need for 2,476 new dwelling units in the Wilsonville Planning Area. Throughout the remainder of this memorandum, we refer to this growth as growth in dwelling units.

Exhibit 5. Forecast for new households and dwelling units, Wilsonville Planning Area, 2019 to 2039

Source: Metro's 2040 Household Distributed Forecast, July 12, 2016. Metro's 2040 TAZ Forecast (released November 6, 2015 and revised January 22, 2016). Calculations by ECONorthwest.

Variable	Wilsonville City Limits	Frog Pond West	Wilsonville Planning Area (Dwelling Units, 2019-2039)
Household Forecast 2019	9,883	40	9,923
Household Forecast 2039	11,635	764	12,399
Total New Dwelling Units (2019-2039)	1,752	724	2,476
Annual Average of New Dwelling Units	88	36	124

Wilsonville is forecast to grow by 2,476 new dwelling units over the 20-year period, with an annual average of 124 dwelling units.

⁸ Metro's 2040 TAZ Forecast (released November 6, 2015 and revised January 22, 2016) shows Frog Pond West (TAZ 976) had 22 households in 2015. The Metro forecast shows Frog Pond West growing to 878 households in 2040, at an average annual growth rate of 15.89% for the 25-year period. Using this growth rate, ECONorthwest extrapolated the forecast to 2019 (40 households) and 2039 (754 households).

⁹ <http://rim.oregonmetro.gov/Webdrawer/Record/558717>

Housing Units Needed

Exhibit 5 presented a forecast of new housing in Wilsonville planning area for the 2019 to 2039 period. This section determines the mix and density needed to meet State requirements (OAR 660-007) and meet the housing needs of Wilsonville residents.

The preliminary conclusion for Wilsonville is that, over the next 20 years, the need for new housing developed in Wilsonville will generally include a wider range of housing types and housing that is more affordable. This conclusion is consistent with housing need in other cities in Clackamas County, the Portland Region,¹⁰ and most cities across the State. This conclusion is based on the following information, found in Appendix B:¹¹

- Wilsonville’s housing mix is unlike Clackamas County’s in that over half of Wilsonville’s housing stock is multifamily housing. In the 2013-2017 period, 41% of Wilsonville’s housing was single-family detached, 8% was single-family attached, and 51% was multifamily. Between 2013 and 2017, Wilsonville issued building permits for 1,352 dwelling units, 99% of which were for single-family detached units.
- Demographic changes across the Portland Region (and in Wilsonville) suggest increases in demand for single-family attached housing and multifamily housing. The key demographic trends that will affect Wilsonville’s future housing needs are:
 - The aging of the Baby Boomers. In 2012-2016, 20% of Wilsonville’s population was over 60 years old. Between 2020 and 2040, the share of people over 60 years old is expected to stay relatively constant in Clackamas County, from 26% of the population to 27% of the population. The aging of the Baby Boomers may have a smaller impact in Wilsonville than in some cities in the County because Wilsonville has a smaller share of people over 60 years of age. The City will be affected by retirement and changing housing needs of seniors as their households get smaller and their lifestyles change. Some Baby Boomers may choose to downsize into smaller homes. Due to health or other issues, some Baby Boomers may become unable to stay in their current homes and will choose to live in multigenerational households or assisted-living facilities (at various stages of the continuum of care).
 - The aging of the Millennials. In 2012-2016, 32% of Wilsonville’s population was between 20 and 40 years old. Between 2020 and 2040, Millennials are expected to grow from 23% of Clackamas County’s population to 28% of the population, an increase of 5% in the share of the population. Homeownership rates for Millennials will increase as they continue to form their own households.

¹⁰ The Portland Region is defined as all of Clackamas County, Multnomah County, and Washington County.

¹¹ Appendix B presents detailed demographic, socioeconomic, and housing affordability data. This section summarizes key findings from Appendix B for Wilsonville. For the most part, data sources included in these findings (and cited in Appendix B) derive from: United States Decennial Census, United States American Community Survey, Portland State University’s Population Research Center, Redfin, and Property Radar.

Wilsonville has a larger share of Millennials than the County. As a result, the City may have increased demand for relatively affordable housing types, for both ownership and rent, over the planning period.

- The continued growth in Latinx populations. From 2000 to the 2012-2016 period, the share of Wilsonville's Latinx population increased from 7% of the population to 14%, an increase of 7% in the share of the population. At the same time, the share of Latinx increased by 3% in Clackamas County and 4% in the Portland Region. Continued growth in Latinx households will increase need for larger units (to accommodate larger, sometimes multigenerational households) and relatively affordable housing.
- Wilsonville's median household income was \$63,097, about \$5,800 lower than Clackamas County's median. Approximately 38% of Wilsonville's households earn less than \$50,000 per year, compared to 35% in Clackamas County and 40% in the Portland Region.
- About 35% of Wilsonville's households are cost burdened (paying 30% or more of their household income on housing costs).¹² About 42% of Wilsonville's **renters** are cost burdened and about 27% of Wilsonville's **homeowners** are cost burdened. Cost burden rates in Wilsonville are similar to those in the Portland Region.
- About 56% of Wilsonville's households are renters, 89% of whom live in multifamily housing. Median rents in Wilsonville are \$1,127 per month, compared to the \$1,091 median rent for Clackamas County as a whole.

A household earning 100% of Wilsonville's median household income (\$63,000) could afford about \$1,577 per month in rent, compared with the median gross rent of \$1,127. A household can start to afford Wilsonville's median rents at about 70% of Wilsonville's median household income. However, Wilsonville's higher proportion of renters who are cost burdened signals housing affordability issues. This suggests that many households who are currently renting in Wilsonville have income below the median family income.

- Housing sales prices increased in Wilsonville over the last three years. From February 2015 to February 2019, the median housing sale price increased by about \$126,600 (39%), from \$328,000 to \$454,500.¹³ At the same time, the median housing home sale price in Clackamas County increased by \$136,700 (46%), from \$298,000 to \$435,500. Median sales prices in Wilsonville were about \$19,000 or about 4% higher than the County average in February 2019.

A household earning 100% of Wilsonville's median household income (\$63,000) could afford a home valued between about \$221,000 to \$252,000, which is less than the median

¹² 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."

¹³ Property Radar.

home sales price of about \$454,500 in Wilsonville. A household can start to afford Wilsonville's median home sale prices at about 185% of Wilsonville's median household income.

These factors suggest that Wilsonville continues to need a broad range of housing types with a wide range of price points. This includes providing opportunity for development of housing types such as: small single-family detached housing (e.g., small-lot single-family and cottages), townhouses, duplexes and quad-plexes, and apartments. Wilsonville is planning for these types housing types in areas like Villebois and Town Center.

Exhibit 6 shows a forecast for housing growth in the Wilsonville city limits during the 2019 to 2039 period. The projection is based on the following assumptions:

- Metro's official forecast for Wilsonville shows that the City will add 2,476 households over the 20-year period. Exhibit 5 shows that Metro's growth forecast results in 2,476 new dwelling units over the 20-year period.
- The assumptions about the mix of housing in Exhibit 6 are consistent with the requirements of OAR 660-007¹⁴:
 - **About 50% of new housing will be single-family detached**, a category which includes manufactured housing. According to 2013-2017 American Community Survey data from the U.S. Census, 41% of Wilsonville's housing was single-family detached.
 - **Nearly 10% of new housing will be single-family attached.** In 2013-2017, 8% of Wilsonville's housing was single-family attached.
 - **About 40% of new housing will be multifamily.** In 2013-2017, 51% of Wilsonville's housing was multifamily.

¹⁴ OAR 660-007-0030(1) requires "(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."

Wilsonville will have demand for 2,476 new dwelling units over the 20-year period, 50% of which are forecast to be single-family detached housing.

Exhibit 6. Forecast of demand for new dwelling units, Wilsonville Planning Area, 2019 to 2039

Source: Calculations by ECONorthwest.

Variable	Mix of New Housing Units (2019-2039)
Needed new dwelling units (2019-2039)	2,476
Dwelling units by structure type	
Single-family detached	
Percent single-family detached DU	50%
equals Total new single-family detached DU	1,238
Single-family attached	
Percent single-family attached DU	10%
equals Total new single-family attached DU	248
Multifamily	
Percent multifamily DU	40%
Total new multifamily DU	990
equals Total new dwelling units (2019-2039)	2,476

The forecast of new units does not include dwellings that will be demolished and replaced. This analysis does not factor those units in, but redevelopment potential in Wilsonville is explained in this document.

Exhibit 7 and Exhibit 8 allocate needed housing to generalized planning designations in Wilsonville. The allocation is based, in part, on the types of housing allowed in planned development ranges and in each plan designation.

Exhibit 7 shows:

- **Residential (PDR 1 through 6¹⁵)** land will accommodate single-family detached housing (including manufactured houses) and multifamily.
- **Village (V) Villebois** land will accommodate single-family detached housing, single-family attached housing, duplexes, row houses, multifamily housing, and cluster housing. Allocation (demand) matches capacity in Villebois.
- **Town Center** land will predominately accommodate multifamily housing with some single-family attached housing. Allocation (demand) matches capacity in Town Center, as described in the Town Center Plan.
- **Residential Neighborhood (RN) Frog Pond West** land will accommodate single-family detached housing (including manufactured houses), single-family attached housing, and duplexes. Allocation (demand) matches capacity in Frog Pond West.

¹⁵ Wilsonville has no buildable land in PDR 7 (20+ du/acre).

Exhibit 7. Allocation of needed housing by housing type and generalized planning designation, Wilsonville (city limits), 2019 to 2039

Source: ECONorthwest.

Housing Types	Generalized Plan Designation				Total
	Residential	Village (Villebois)	Commercial (Town Center)	Residential Neighborhood (Frog Pond West)	
Dwelling Units					
Single-family detached	435	173	-	630	1,238
Single-family attached	-	30	124	94	248
Multifamily	-	234	756	-	990
Total	435	437	880	724	2,476
Percent of Units					
Single-family detached	18%	7%	0%	25%	50%
Single-family attached	0%	1%	5%	4%	10%
Multifamily	0%	9%	31%	0%	40%
Total	18%	18%	36%	29%	100%

Notes:

Per the City of Wilsonville, as of February 2019, outstanding development potential in **Villebois** (Village Zone and Comprehensive Plan designation) consists of the following assumed uses: 173 single family detached units, 30 row houses/single-family attached units, and 235 multifamily units (including apartments and stacked condominiums. Due to rounding, the allocation table shows 234 multifamily units.

Per Wilsonville Town Center Master Plan (March 2019),¹⁶ potential future development in **Town Center** is 880 units (page 41, table 3.1). The City of Wilsonville indicated that Town Center will be predominately composed of multifamily housing with some single-family attached housing.

Frog Pond West planning area is located in transportation analysis zone (TAZ) 976, which is forecast to grow by 724 households/dwelling units between 2019 and 2039. The 2040 TAZ forecast for households is from Metro, released November 6, 2015 and revised January 22, 2016, which is different from the *Frog Pond West Master Plan*.

¹⁶

https://www.ci.wilsonville.or.us/sites/default/files/fileattachments/planning_commission/meeting/packets/88931/ii.a._town_center_plan_90_minutes.pdf

Exhibit 8. Allocation subset (Residential) of needed housing by housing type, Wilsonville (city limits), 2019 to 2039

Source: ECONorthwest.

Housing Types	Residential						Total
	0-1 DU/Acre	2-3 DU/Acre	4-5 DU/Acre	6-7 DU/Acre	10/12 DU/Acre	16-20 DU/Acre	
Dwelling Units							
Single-family detached	-	-	207	208	20	-	435
Single-family attached	-	-	-	-	-	-	-
Multifamily	-	-	-	-	-	-	-
Total	-	-	207	208	20	-	435

Exhibit 9 shows an estimate of baseline densities for future development. If the City conducts a full HNA, the City may need to evaluate assumptions about future densities to determine whether the City is meeting the requirements of OAR 660-007 to provide opportunity for housing.

Exhibit 9 also converts between net acres and gross acres¹⁷ to account for land needed for rights-of-way by plan ranges within Residential in Wilsonville, based on Metro's methodology of existing rights-of-way.¹⁸ Exhibit 9 uses the mathematical average of permitted housing density by planned development range informed the baseline density (with the exception of the 0-1 du/acre range, where we use one dwelling unit per acre). For example, the average density in the 2-3 du/acre range, will be 2.5 dwelling units per gross acre, in tax lots smaller than 0.38 acres as no land is needed for rights-of-ways based on Metro's assumptions. In this planned development range, for lots between 0.38 and 1.0 acres, the future density will be 2.3 dwelling units per gross acre and for lots larger than 1.0 acres the future density will be 2.0 dwelling units per gross acre.

¹⁷ 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.

¹⁸ 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.

Exhibit 9. Future Housing Densities in Residential Accounting for land for rights-of-way, Wilsonville city limits, 2013 to 2017¹⁹

Source: ECONorthwest. Note: DU is dwelling unit.

Plan Designation and Planned Development	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)
Residential									
0-1 du/ac	1.0	0%	1.0	1.0	10%	0.9	1.0	18.5%	0.8
2-3 du/ac	2.5	0%	2.5	2.5	10%	2.3	2.5	18.5%	2.0
4-5 du/ac	4.5	0%	4.5	4.5	10%	4.1	4.5	18.5%	3.7
6-7 du/ac	6.5	0%	6.5	6.5	10%	5.9	6.5	18.5%	5.3
10-12 du/ac	11.0	0%	11.0	11.0	10%	9.9	11.0	18.5%	9.0

Housing Need 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 10 is based on American Community Survey data about income levels of existing households in Wilsonville. Income is categorized into market segments consistent with HUD income level categories, using Clackamas County's 2018 Median Family Income (MFI) of \$81,400. The percentages used in Exhibit 10 are based on current household income distribution, assuming that approximately the same percentage of households will be in each market segment in the future.

¹⁹ The analysis of historical densities was housing developed between 2013 and 2017. The analysis of land in rights-of-way is based on analysis of existing development patterns and percentages of land in rights-of-way in 2018.

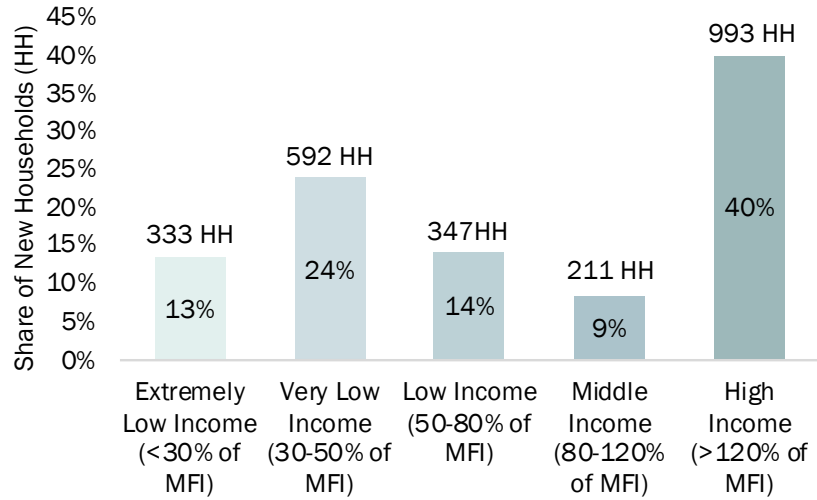
About 37% of Wilsonville’s future households will have income below 50% of Clackamas County’s median family income (less than \$40,700 in 2016 dollars) and about 23% will have incomes between 50% and 120% of the county’s MFI (between \$40,700 and \$97,680).

This trend shows a substantial need for more affordable housing types, as well as housing types affordable to households earning more than 120% of MFI.

Exhibit 10. Future (New) Households, by Median Family Income (MFI) for Clackamas County (\$81,400), Wilsonville, 2019 to 2039

Source: U.S. Department of Housing and Urban Development. U.S. Census Bureau, 2012-2016 ACS Table 19001.

The percentages used in Exhibit 10 are based on current household income distribution, assuming that approximately the same percentage of households will be in each market segment in the future.



Need for Government Assisted, Farmworker Housing, and Manufactured Housing

ORS 197.303, 197.307, 197.312, and 197.314 requires cities to plan for government-assisted housing, farmworker housing, manufactured housing on lots, and in manufactured home parks.

- **Government-subsidized housing.** Government-subsidies can apply to all housing types (e.g., single family detached, apartments, etc.). Wilsonville allows development of government-assisted housing in all residential plan designations, with the same development standards for market-rate housing. This analysis assumes that Wilsonville 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 also apply to all housing types and the City allows for development of farmworker housing in all residential plan designations, with the same development standards as market-rate housing. This analysis assumes that Wilsonville 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.** Wilsonville allows manufactured homes on lots in residential zones. Wilsonville does not have special siting requirements for manufactured homes. Since manufactured homes are subject to the same siting requirements as site-built homes, it is not necessary to develop separate forecasts for manufactured housing on lots.
- **Manufactured housing in parks.** 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. According to the Oregon Housing and Community Services' Manufactured Dwelling Park Directory,²⁰ Wilsonville has two manufactured home parks within the City, with 120 spaces.

ORS 197.480(2) requires Wilsonville 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.

- Wilsonville will grow by 2,476 dwelling units over the 2019 to 2039 period.

²⁰ Oregon Housing and Community Services, Oregon Manufactured Dwelling Park Directory, <http://o.hcs.state.or.us/MDPCRParcs/ParkDirQuery.jsp>

- Analysis of housing affordability shows that about 37% of Wilsonville’s new households will be Extremely-Low or Very-Low Income, earning 50% or less of the region’s median family income. One type of housing affordable to these households is manufactured housing.
- Manufactured housing in parks accounts for about 1.3% (about 120 dwelling units) of Wilsonville’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 24% of Wilsonville’s households. However, households in other income categories may live in manufactured homes in parks.

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 in Wilsonville is unlikely.

Our conclusion from this analysis is that development of new manufactured home parks in Wilsonville over the planning period is unlikely over the 2019 to 2039 period. It is, however, likely that manufactured homes will continue to locate on individual lots in Wilsonville. The forecast of housing assumes that no new manufactured home parks will be opened in Wilsonville over the 2019 to 2039 period. The forecast includes new manufactured homes on lots in the category of single-family detached housing.

- Over the next 20 years (or longer) one or both manufactured home parks may close in Wilsonville. This may be a result of 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,²¹ the

²¹ 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

City has a role to play in ensuring that there are opportunities for housing for the displaced residents. The City has ordinances that regulate closure of existing mobile and manufactured home parks that exceed State standards, requiring adequate notice of closure, definition and mitigation of social and economic impacts of the proposed closure, and provision of relocation and other assistance to park 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 development to allow for development of new, relatively affordable housing. 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, designating more land for multifamily housing or 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. For example, Wilsonville incentivized development of affordable multifamily housing in the Creekside Woods development, to accommodate the former residents of the Thunderbird Mobile Home Park when the park closed.

Baseline Assessment of Residential Land Sufficiency

This section presents an evaluation of the sufficiency of vacant residential land in Wilsonville to accommodate expected residential growth over the 2019 to 2039 period. This section includes an estimate of residential development capacity (measured in new dwelling units) and an estimate of Wilsonville's ability to accommodate needed new housing units for the 2019 to 2039 period, based on the analysis in the housing needs analysis.

Capacity Analysis

The comparison of supply (buildable land) and demand (population and growth leading to demand for more residential development) 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 city limits to accommodate new

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.

housing. This analysis, sometimes called a “capacity analysis,”²² can be used to evaluate different ways that vacant residential land may build out by applying different assumptions.

Wilsonville Capacity Analysis Results

Exhibit 11 summarizes capacity in all of the areas of the Wilsonville Planning Area, based on the more detailed analysis shown in Exhibit 12 and Exhibit 13.

Exhibit 11. Summary of capacity within areas of the Wilsonville Planning Area, 2019 to 2039

Source: Buildable Lands Inventory; Calculations by ECONorthwest. Note: DU is dwelling unit.

Note: Capacity matches demand in Villebois, Town Center, and Frog Pond West.

Generalized Plan Designation	Capacity (Dwelling Unit)
Residential	336
Village (Villebois)	437
Town Center	880
Residential Neighborhood (Frog Pond West)	724
Total	2,377

The capacity analysis estimates the development potential of vacant Residential land by planned density range to accommodate new housing, based on the densities shown in Exhibit 9. Exhibit 12 shows that **Wilsonville’s vacant and partially vacant land in Residential has capacity to accommodate approximately 336 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 that allow residential uses.
- **Assumed densities.** The capacity analysis in Exhibit 12 assumes development will occur at historical densities. Those densities were derived from the densities shown in Exhibit 9.
- **Average net density.** Exhibit 12 shows capacity and densities in gross density. OAR 660-007 requires that Wilsonville provide opportunity for development of housing at an overall average density of eight dwelling units per net acre. The average net density of

²² 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.

buildable residential land in Exhibit 12 is 7.4 dwelling units per net acres and 6.2 dwelling units per gross acre.

Exhibit 12. Estimate of residential capacity on unconstrained vacant and partially vacant buildable Residential land, Wilsonville city limits, 2019 to 2039

Source: Buildable Lands Inventory; Calculations by ECONorthwest. Note: DU is dwelling unit.

Plan Designation and Planned Development Range	Tax Lots Smaller than 0.38 acre			Tax Lots \geq 0.38 and \leq 1.0 acre			Tax Lots larger than 1.0 acre			Total, combined	
	Build-able Acres	Density Assumpt. (DU/gross acre)	Capacity (Dwelling Units)	Build-able Acres	Density Assumpt. (DU/gross acre)	Capacity (Dwelling Units)	Build-able Acres	Density Assumpt. (DU/gross acre)	Capacity (Dwelling Units)	Build-able Acres	Capacity (Dwelling Units)
Residential											
0-1 du/ac	0	1.0	0	3	0.9	2	0	0.8	0	3	2
2-3 du/ac	0	2.5	0	1	2.3	1	0	2.0	0	1	1
4-5 du/ac	1	4.5	2	3	4.1	12	2	3.7	8	6	22
6-7 du/ac	1	6.5	4	2	5.9	11	22	5.3	116	25	131
10-12 du/ac	1	11.0	11	2	9.9	15	17	9.0	154	20	180
Total	3	-	17	10	-	41	42	-	278	54	336

Capacity in master plan areas (Exhibit 13) assumes that demand will match capacity in Town Center, Villebois, and Frog Pond West. Wilsonville's capacity for dwelling units in Frog Pond West, Town Center, and Villebois totals 2,041 dwelling units.

Exhibit 13. Estimate of residential capacity in Frog Pond West, Town Center, and Villebois 2019 to 2039

Source: Conversations with the City of Wilsonville. Metro's 2040 TAZ forecast for households (TAZ 976), released November 6, 2015 and revised January 22, 2016. Wilsonville Town Center Master Plan.

Area	Capacity (Dwelling Units)
Residential Neighborhood (Frog Pond West)	
Single-Family Detached	630
Single-Family Attached & Multifamily	94
Town Center	
Single-Family Detached	-
Single-Family Attached & Multifamily	880
Village (Villebois)	
Single-Family Detached	173
Single-Family Attached & Multifamily	264
Total	2,041
Single-Family Detached	39%
Single-Family Attached & Multifamily	61%

Residential Land Sufficiency

The next step in the analysis of the sufficiency of residential land within Wilsonville is to compare the forecast for new housing by generalized plan designation (Exhibit 7) with the capacity of land by generalized plan designation (Exhibit 12 and Exhibit 13).

Exhibit 14 shows:

- Wilsonville has a **small surplus of capacity (3 dwelling units)** in the 0-1 du/ac and 2-3 du/ac planned development ranges.
- Wilsonville has a **deficit of capacity for 185 dwelling units in the 4-5 du/ac and 77 dwelling units in the 6-7 du/ac ranges**. Exhibit 8 shows that this deficit is for single-family detached housing types.
- Wilsonville has a **surplus of capacity of 160 dwelling units** in the 10-12 du/ac planned development range. The 2014 *Wilsonville Residential Land Study: Technical Report* assumed that about 10% of new housing in the 10-12 du/ac range would be single-family detached and the remainder single-family attached or multifamily. This analysis uses the same assumption. As a result, this 160 unit surplus will likely all be single-family attached and multifamily housing types.
- Wilsonville has **sufficient capacity** in the Village, Town Center, and Residential Neighborhood areas to accommodate expected growth

Exhibit 14. Capacity to accommodate new housing with demand for new housing, Wilsonville city limits, 2019 to 2039

Source: Buildable Lands Inventory; Calculations by ECONorthwest. Note: Capacity matches demand in Villebois, Town Center, and Frog Pond West.

*Note: The 10-12 du/ac planned development range includes capacity for 20 dwelling units of single-family detached housing.

Plan Designation and Planned Development Range	Capacity of Buildable Residential Land (Dwelling Units)	Demand for New Housing (Dwelling Units)	Comparison Capacity minus Demand (Dwelling Units)
Residential			
0-1 du/ac	2	0	2
2-3 du/ac	1	0	1
4-5 du/ac	22	207	(185)
6-7 du/ac	131	208	(77)
10-12 du/ac	180	20	160
Village (Villebois)	437	437	0
Commerical (Town Center)	880	880	0
Residential Neighborhood (Frog Pond West)	724	724	0

Summary of Planned Housing Mix

Exhibit 15 shows the estimated housing mix based on the forecast for new housing. About 50% of new housing will be single-family detached and 50% will be single-family attached and multifamily. Exhibit 14 shows that Wilsonville has a deficit of land to accommodate 262 new dwelling units in areas planned as Residential (in the 4-5 du/ac and 6-7 du/ac ranges), all of which are expected to be single-family detached units.

Exhibit 15. Estimated housing mix based on forecast of housing need

Source: Calculations by ECONorthwest.

Note: The type of attached and multifamily housing planned in Frog Pond West is single-family attached housing, not multifamily housing.

Generalized Plan Designation	Single-Family Detached	Single-Family Attached and Multifamily
Residential	435	-
Village (Villebois)	173	264
Commerical (Town Center)	-	880
Residential Neighborhood (Frog Pond West)	630	94
Total Units	1,238	1,238
Percent of Total	50%	50%

Conclusions and Next Steps

The conclusions of the baseline HNA are:

- **Identify opportunities to address the housing deficits shown in Exhibit 14.** Wilsonville has a deficit of capacity (262 dwelling units) for single-family detached housing, resulting in a deficit of about 53 gross acres of suitable land for residential development. These deficits are in the planned density ranges for 4-5 du/ac and 6-7 du/ac. These deficit may be met through planning for new development in the Frog Pond South and Frog Pond East areas.
- **Work with Metro to better understand the analysis of redevelopment potential and ensure that the analysis makes sense in the context of Wilsonville’s housing market and planning context.** Metro assumes a substantial amount of redevelopment (shown in Exhibit 4) may occur in the Village designation (Villebois). Given that Villebois is still developing and that most development there is relatively new, the City should better understand what types of redevelopment that Metro expects to occur in Villebois. On the other hand, the redevelopment analysis shows little redevelopment potential in Town Center. Metro conducted the redevelopment analysis prior to the City’s completion of the *Town Center Plan*.
- **Evaluate changes in Wilsonville’s housing market since the *Wilsonville Residential Land Study: Technical Report* was completed in May 2014.** This report presented a HNA for Wilsonville. Since 2014, the housing market in Wilsonville has continued to change. Below is a brief summary of changes in Wilsonville’s housing market since completion of the 2014 Report. The City should evaluate changes since 2014 in more detail.
 - *Wilsonville is growing faster than the forecast in the 2014 Report*, which forecast growth of 3,749 new units over the 2014 to 2034 period, or about 187 new units per year. Between 2013 and 2017, Wilsonville issued permits for 1,352 new dwelling units or 338 new units per year. The forecast for new growth in the Wilsonville Planning area is for 123 new units per year, which is a considerably slower growth than the city has been experiencing.
 - *Wilsonville’s growth since 2013 has been mostly single-family dwelling units*, with 99% of the new 1,352 units permitted being single-family units, including single-family detached and single-family attached. The 2014 report shows that, between 2000 and 2012, 66% of the new units permitted were multifamily housing (1,892 units), with 34% (970 units) in single-family housing types.
 - *Housing sales prices continue to increase.* In 2012, the median sales price for housing in Wilsonville was \$290,000. By 2019, the median sales price was \$454,500, an increase of \$164,000 or 57%. This increase is consistent with increases in housing prices across Clackamas County and the Portland region.

- *Rents also increased.* For the 2007-2011 period, the median gross rent was \$912 per unit. In the 2012-2016 period, gross rent increased to \$1,127, an increase of \$215 or 24%. This is consistent with increases in rent costs across Clackamas County and the Portland region.
- *The landbase in Wilsonville has changed.* Villebois continued to build-out since 2014 and will be nearing build-out in the next years. Frog Pond West was brought into the city and the master plan was completed. If the rate of growth in Wilsonville continues, Frog Pond West will build-out early in the 2019 to 2039 planning period.
- *Wilsonville continues to have a deficit of land for single-family housing.* Wilsonville has a deficit of land for 162 single-family detached dwelling units, shown in the 4-5 du/ac and 6-7 du/ac residential density ranges in Exhibit 14. These units could be accommodated in Frog Pond South and Frog Pond East. The Metro UGB has been expanded to include these areas but that expansion has not yet been acknowledged by DLCD.

Once these areas are acknowledged to be within the Metro UGB, Wilsonville should continue to planning work to bring these areas into the city limits and get land in these areas development ready. Given that Wilsonville continues to grow faster than Metro's forecasts, Wilsonville may need these areas to accommodate residential growth within the next five to ten years and maybe as soon as five to seven years if Wilsonville continues to grow at the rate the city did between 2013 to 2017.

Appendix B: Summary of Stakeholder Input

This document provides an overview of stakeholder input and ideas for how to improve housing equity in Wilsonville. To understand the housing challenges in Wilsonville and possible solutions to them, the project team conducted a stakeholder engagement process with the following activities:

- Focus groups and interviews during summer 2019
- An informational kiosk at the Wilsonville Public Library in December 2019
- Online surveys and feedback forums on Let's Talk Wilsonville, the City's online public engagement platform from August to December 2019
- A survey of people living in rent-regulated affordable housing in December 2019

This appendix is composed of three parts:

- Part 1: Summary of Input on Equitable Housing
- Part 2: Summary of Input on Broader Social Equity Themes
- Part 3: Outreach Process and Key Findings for Each Outreach Activity

Part 1: Summary of Input on Equitable Housing

A few larger themes surfaced that helped shape the plan, summarized below:

- **Wilsonville’s rental market is bifurcated.** There is subsidized rental housing for lower-income households and newer, more expensive developments, but little else in the middle. While stakeholders recognized that Wilsonville has a large share of multifamily units, the city lacks older market-rate rental housing that has “filtered” over time to become less expensive. The result is that the city’s rental market is perceived as being more similar to Lake Oswego and West Linn than to Milwaukie or Oregon City. Many people are paying more than they can afford for rental housing in the city.
- **For homeowners, housing affordability is seen as a key obstacle.** Wilsonville needs middle-income ownership housing most of all, including housing for residents earning 80% to 120% of area median income. Per the service providers in the focus group, the biggest challenge to homeownership that renters identified was finding a home that they could afford, especially for single-parent families and people of color. For existing homeowners, there is ongoing concern about HOA fees and property taxes driving up housing costs for themselves and for future residents. There are some resources to support existing homeowners, like home repair programs, but demand for support may be larger than the individual programs can address on their own.
- **There is a need for housing for people with mobility needs.** A key theme in the outreach was the need for single-level homes.
- **There is a perception that there is little land for infill housing development and some opportunities for the City to explore in new planning areas.** Those opportunities include (1) encouraging new housing types (e.g., homes with accessory dwelling units (ADUs) in new residential neighborhoods) with incentives (e.g., tax abatements) and (2) an easier/clearer path for small and medium infill development. Developers also identified tools to support housing affordability that other communities have, but Wilsonville lacks.
- **Wilsonville has a strong and positive history of working with affordable housing developers.** The City’s active support is both valued and seen as being essential for future development to occur. Because of this positive relationship, nonprofit housing providers are willing and eager to consult with the City early on and lend their development knowledge and expertise to planning efforts.

Part 2: Summary of Input on Broader Social Equity Themes

Equity – a world in which all people have housing choices that meet their unique needs without racial and economic disparities – is a key component of a larger strategy of achieving greater equity. As part of the project team’s conversations with stakeholders, other themes related to equity emerged, not specific to housing. While most of the items below are not directly related to housing and are therefore not appropriate to include as actions in a housing-focused strategy, they are a starting place for a more comprehensive approach to an equitable future for the City of Wilsonville. These insights informed the overall planning process, and also are fruitful feedback for future City of Wilsonville equity-planning initiatives.

General Social Equity Themes

- Wilsonville would be well-served by a committee or body focused on issues of diversity and inclusion, to provide a forum for the City to more comprehensively address social equity across all of its functions and services.
- More social connections are needed for residents who do not have a community gathering space where they feel welcome.
- Service providers participating in a Summer 2019 focus group provided examples of some residents, including people experiencing homelessness and people of color, reporting that they had felt unwelcome in public spaces.
- It is important to promote inclusion within the community. As discussed at a high level at the February 2020 Planning Commission meeting, it is important to think about what would encourage people of color to move into Wilsonville, especially if there are not enough jobs for people with different skillsets.

General Social Equity Ideas

- Develop a citywide equity strategy that incorporates a new approach to drive internal and external operations toward a more socially just and equitable community.
- Consider expanding representation on boards and commissions to increase diversity of backgrounds and views, including the Development Review Board and Planning Commission.
- Require future housing data collection and analysis (e.g., HNA, BLI, etc.) to include an equity-based group of people to provide input, feedback, and identify equity measures.
- Convene community-based organizations to determine how the City can best support them.
- Consider chartering a Human Rights Commission or similar organization that would encourage diversity, inclusivity, and celebration of Wilsonville’s many cultures.

- Given the bifurcated housing market of subsidized housing and expensive homes, aiming for the inclusion of owner-occupied units at 80 to 120% of median income would be a great idea. Wilsonville needs middle-income housing most of all.
- Reach out to school district representatives to discuss possible partnerships related to equity training, new policies to promote inclusion, etc.
- Generate ideas for what actions the City could take to attract more people of color to the community.
- Ask each of the City's boards and commissions to spend part of a meeting in the next year talking about equity and how it could incorporate greater equity in its work. The City might consider creating a training toolkit that the boards and commissions could use to increase their understanding of equity and inclusion. Each group could list what it is doing now to promote equity and inclusion and identify two to three new actions it could take in the next year to bring greater equity and inclusion into its work. This could be repeated annually or biennially.

Part 3: Outreach Process and Key Findings

Focus Groups and Interviews

The project team conducted three focus groups with employers, nonprofit service providers in Wilsonville, and nonprofit affordable housing providers. The team also conducted ten interviews with for-profit developers and a representative from the real estate industry.

Key Findings

- **Wilsonville's rental market is perceived as having newer, higher quality, more expensive developments with longer waitlists.** The market is perceived as being more similar to Lake Oswego and West Linn than to Milwaukie or Oregon City. The County gets fewer calls on discrimination/repairs/landlord-tenant issues from residents in Wilsonville. The City has a lot of amenities that make it an attractive place to build housing.
- **There is ongoing concern about HOA fees and property taxes driving up housing costs.**
- **Needed housing types:** Single-story units; smaller homes; triplex/duplexes; houses with ADUs; low-cost, single-room occupancy units for people transitioning into the area; roommate matching/homeshares.
- **Who needs help with housing:** single parents, single working adults, people with disabilities, seniors (people cannot age in place easily in Wilsonville).
- **There are not a lot of services for homeless people available locally.**
- **Like affordable rental housing, affordable homeownership projects require subsidy.** About \$100,000 to \$120,000 in subsidy is needed to build a new home affordable at 60% to 80% AMI; if purchasing an existing home, a buyer needs about 20% of the home's

value. The subsidy can come from several sources: land write-downs, permit fee/SDC waivers, outright subsidy, etc.

- **Affordability is a key issue for employers.** In a recent survey of the city’s employers, approximately 30% identified housing costs as a problem for local businesses.
- **The cost of housing presents challenges for those relocating from out of state.** Employers are challenged to find affordable, temporary housing for employees moving to the area. Those arriving in the area find housing costs to be out of line with their previous location. Many employers have to increase wages as a result.
- **Workers commuting to Wilsonville face increasing congestion** (especially shift workers). Some businesses mentioned having a difficult time retaining employees, partly due to transportation costs. Many would like to see increased transportation options for workers, such as regional transit connections and bike/walk options.
- **Employers do not have capacity to offer housing assistance** because they are increasing wages. Instead, employees (particularly lower-wage employees) are finding lower-cost housing in places like Salem, Keizer, Woodburn, Oregon City, Tualatin, and Canby.
- **Additional workforce housing and affordable student housing is needed** to help accommodate growing employment and student populations.
- **Developers working in Wilsonville find some of the City’s regulations to be onerous,** including the stormwater regulations and high SDC fees (though these are comparable to other areas). Many were complimentary of City staff but would like to see a less discretionary, streamlined review process. There has been public pushback on infill development due to density and parking concerns, which has led to increased carrying costs.
- **There is the perception that there is not a lot of land to accommodate new infill development.** Wilsonville is not on the radar for many infill developers given the lack of land for infill development, and the perception that Town Center is not yet “ready” for development.
- **The City could do a better job encouraging new housing types** (like homes with ADUs in new residential neighborhoods) with incentives (e.g., Vertical Housing Program) and an easier/clearer path for small and medium infill development.
- **Capacity for ADUs and infill development in most neighborhoods is unknown:** The majority of Wilsonville’s residential areas are covered under covenants and restrictions (CC&Rs) established by the original developers. The capacity for existing homes to add ADUs or infill on a large lot is unknown by the City and many property owners. New developments could add provisions for ADU development in the future, but there is no incentive for developers to deviate from writing CC&Rs to match the original plans.
- **Some developers referenced incentives that other communities provide:** SDC waivers for ADUs (Wilsonville has this provision in policy), Tigard’s Lean Code, tools for preserving affordability, and tools to reduce carrying costs.

- **The list of developers working in Wilsonville is short.** Developers who might be a good fit for infill development in the Town Center or other areas are not familiar with the City's opportunities or potential incentives. While many developers are focusing attention on suburban markets, they remain interested in opportunities near good transit and existing services and retail. Infill developers are looking to partner with a city and would be open to an array of incentives. Supports could include land write-downs, SDC waivers, tax abatements, urban renewal support for infrastructure development, etc.
- **The City and County could have a closer working relationship, potentially through information sharing, relationship-building and formal agreements on County and other housing resources.** Information and referral linkages between the City and County regarding services for older adults are strong; what is needed is more actual onsite (in Wilsonville) delivery of County programs. More ongoing information sharing is needed about plans for the Metro Housing Bond, assistance for renters, housing authority programs, use and availability of federal housing assistance, and homelessness funding.
- **Wilsonville has a strong and positive history of working with affordable housing developers in the past.** For example, the City made land available, championed projects, and cleared a pathway toward a tax exemption for affordable units. This has solidified the City's good reputation among affordable housing developers.
- **A city's advocacy and support for affordable housing is key in making a project work.** Projects need champions on City Council, the Planning Commission, and among City staff to problem-solve development review projects and provide support for these projects at neighborhood meetings.
- **The Metro Affordable Housing Bond is a near-term opportunity to help fund affordable housing.** The City is receiving calls from affordable housing developers who might be interested in working in the city.
- **The City-owned site near the WES station could be a desirable Transit-Oriented Development site.** To make property near WES station viable, the City needs to: provide a clear path for land use review, write down land cost, provide goals for the project, and make site issues known.
- **Affordable housing developers like being involved early in process.** They are happy to share expertise and can even bring development team to talk about ideas for potential sites. Possible opportunities for tours and additional engagement.
- **Some see isolation among some residents.** More social connections are needed for residents who do not have a community gathering space. The city's parks are a wonderful asset and people feel safe there.

Library Kiosk

In December 2019, the project team placed a kiosk survey board in the Wilsonville Public Library to gather resident input on what kind of housing Wilsonville needs most. The board was presented in English and Spanish to gather input from a wider range of residents who live

in Wilsonville, focusing on residents who have not provided project feedback through other venues such as Let's Talk, Wilsonville!

In total there were over 320 votes, which ranked eight different potential housing types for Wilsonville. Participants could choose to place as many votes as they wanted. Every housing option received votes, and the top three choices were single-level homes where people can live their whole lives, smaller, single-family homes, and homes with an accessory dwelling unit (ADU). Smaller homes were preferred more often than bigger, single-family homes at a ratio of two to one. Co-housing, which ranked fifth, received higher interest than smaller apartments or live-work spaces; both of these options ranked last, with fewer votes overall.

Most popular responses

- Single-level homes/accessibility was the most popular response
- Smaller homes (but not as much interest in smaller apartments); preferred to bigger homes by 2 to 1 ratio.
- Homes with an accessory dwelling unit

Let's Talk Wilsonville Survey and Submitted Stories

The City of Wilsonville released a survey about equitable housing on its online open house platform, Let's Talk Wilsonville, in August 2019, and a quick poll in December 2019. In addition, website visitors could submit stories about their housing experiences in the city.

Key Findings

- A total of 80 residents took the online survey. Respondents tended to be longtime residents (10+ years, 36%) or fairly new to the City (1-5 years, 39%). Renters were highly underrepresented, with 76% of respondents stating they owned their home.
- General takeaways from people who rent their homes:
 - Properties are seen as fairly well-maintained.
 - All but one respondent was at least somewhat stressed about the possibility of rent increases (79% responded yes).
 - The biggest challenge respondents identified to buying a home in Wilsonville is finding a home they can afford (68% of respondents).
- General takeaways from people who own their homes:
 - Affording maintenance needs is not generally a problem, but 88% of owners are at least somewhat stressed about affording overall monthly housing costs.
 - There is close to a 50/50 split on whether homes are suitable for aging in place. Multiple floors seem to be the biggest factor in this perception.
 - Less than half of owners (41%) think they could afford to buy a home in Wilsonville in today's market.
- Commute and schools were the top two choices of why people chose Wilsonville.

- Respondents were split on whether there is an adequate variety of housing types in Wilsonville.
- Housing concerns are mixed:
 - Just under half of respondents indicated concerns about cost of housing and expressed a need for more affordable housing.
 - About one-third of respondents shared concerns around themes of quick growth, density, too many apartments, etc.
 - Other comments indicated that more unit types are needed in the City.
- A separate “quick poll” asked “Which of these ideas would most help ensure that people from different backgrounds, ages, ethnicities, incomes, and physical abilities have an opportunity to enjoy Wilsonville?” (*a total of 31 responses were recorded as of January 13, 2020*)
 - The most popular response was “encourage builders to construct more single-level homes with features that make independent living easier.” (31% of responses)
 - Other responses that garnered interest were:
 - Work with apartment owners to maintain housing for the long term and keep rents from increasing too rapidly (all types of apartments, not only “affordable housing”) (21% of responses)
 - Make it easier to build different types of homes – single detached homes, cohousing, townhomes, cottage clusters, apartments, mobile home parks (17% of responses)
- Themes of stories shared on Let’s Talk, Wilsonville!: (14 total submitted)
 - Lack of starter homes affordable for first time homebuyers
 - Increased cost of rent over time
 - More housing types needed
 - Little housing for working class
 - Need for more outreach and education on available services
 - Good quality of life – parks and schools
 - Need to plan for infrastructure to support increased growth

Renter Survey

In order to improve the project’s engagement of underrepresented groups, including renters and communities of color, housing surveys were distributed to residents living in Wilsonville’s subsidized affordable apartment complexes in December 2019. A total of 14 responses were returned to the project team.

Key Findings

Residents surveyed seem to be connected to the community of Wilsonville:

- Most of the respondents do not plan to leave Wilsonville in the next five years.
- Around 36% of respondents only looked in Wilsonville for housing.
- Most respondents were somewhat long-term residents, five years or more.
- Around 40% of respondents would contact friends or family in times of need, which suggests they have a strong network nearby.

Survey respondents feel secure and satisfied with their housing:

- Compared to the national averages, respondents found affordable housing very quickly.
- The majority also did not feel that they are at risk of losing their housing or not being able to afford their current home in the future.
- While many of the responses to the quick poll and library kiosk indicated a need for more housing suitable to aging in place, all but one respondent to this survey felt they are able to age in their current home without issue.

Survey respondents may not feel it is possible to be homeowners or are just not interested:

- The most picked answer for the last question, which asked about strategies that would help ensure that people from different backgrounds, ages, ethnicities, incomes, and physical abilities can live in Wilsonville was “working with apartment owners to maintain housing for the long term and keep rents from increasing too rapidly.”
- Very few respondents aspired to buy a home. This could be due to how satisfied they are with their current living situation. However, it is interesting to note that they believe the biggest barrier for anyone to buy a home in Wilsonville would be finding a home they could afford. This suggests that, if they did aspire to own a home, they see it being a big challenge to stay in their community.

Detailed Results

Question 1: How long have you lived in Wilsonville?

Twelve survey respondents have lived in Wilsonville for more than five years.

Question 2: Why did you choose to live in Wilsonville?

Housing cost was at least one of the reasons 10 survey respondents choose to live in Wilsonville. For half of the respondents, parks and open space was one of the reasons they choose Wilsonville. Only one survey respondent chose Wilsonville because of the proximity to

work. No respondents choose to live in Wilsonville for the school system or because they liked the home.

Question 3: When you were looking for your current home, how long did it take before you found it in Wilsonville?

Ten respondents only looked for housing for between zero to six months before finding housing in Wilsonville. The other respondents found housing between six months and two years. No respondents waited more than two years to find housing.

Question 4: When you were looking for your current home, what other areas were you considering?

Five respondents were looking for housing in only Wilsonville. The two other cities most commonly chosen were Tualatin and Oregon City.

Question 5: Do you feel your home is suitable for aging in place?

All but one respondent felt that their home is suitable for aging in place.

Question 6: Is your home big enough to meet the needs of your family?

Twelve respondents felt their home is big enough to meet their needs.

Question 7: If you could improve one thing about your housing now, what would it be?

The majority of respondents chose other. There did not appear to be any trend for the other responses. The second highest response for this question was more bedrooms.

Question 8: How well do you feel the property owner is maintaining your home?

Ten respondents felt that their property is well maintained. No respondents felt that their home is poorly maintained.

Question 9: Do you feel stressed about your ability to afford monthly housing costs?

Nine respondents indicated that they are not stressed about affording monthly housing costs. Only one respondent felt stressed with two feeling somewhat stressed.

10. Do you plan to stay in your current home for at least the next 5 years?

Ten respondents planned to stay in their current home for the next five years. Three were unsure.

11. Do you aspire one day to buy a home?

Ten respondents do not aspire to buy a home.

12. What do you think would be the biggest challenge to buying a home in Wilsonville?

Ten respondents believed that finding a home they could afford would be the biggest barrier to buying a home (some respondents chose more than one response).

13. If you had an issue with you living situation or needed assistance, who would you go to for help?

Seven respondents indicated that they would go to County or State services for help, and seven indicated that they would go to family or friends (some respondents chose more than one response).

14. Which of these ideas would help ensure that people from different backgrounds, ages, ethnicities, incomes, and physical abilities can live in Wilsonville?

Nine respondents thought that working with apartment owners to maintain housing for the long term and keep rents from increasing too rapidly would help the most (some respondents chose more than one response).

Appendix C: Construction Excise Tax Implementation Roadmap

How It Works

In 2016, the Oregon Legislature passed Senate Bill 1533 which permits cities to adopt a construction excise tax (CET) on the value of new construction projects to raise funds for affordable housing projects. The statute permits a maximum rate of 1% of permit value on residential construction and does not limit the rate on commercial and industrial construction. The adopting jurisdiction selects the rate within these constraints. Many communities in Oregon are exploring the application of CET for housing projects, because the tool can provide a locally-generated, dedicated source of funds for affordable housing programs and developer incentives.

The allowed uses for CET funding are defined by the state statute. The City may retain 4% of funds to cover administrative costs. The net revenue after deducting administrative costs 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 net revenue must be used for local housing programs, as defined by the jurisdiction, and the remaining 50% are unrestricted.

The statute exempts public buildings, regulated affordable housing, places of worship, public and private hospitals, agricultural buildings, and nonprofit long-term care facilities, residential care facilities, and continuing care retirement communities.² The City can exempt other types of development if desired (e.g., small developments under a certain size or permit value). The tax applies only to new construction and additions or remodels that add square footage.

Construction Excise Taxes in Oregon¹

As of 2020, the following Oregon cities have adopted a CET:

- Portland
 - Corvallis
 - Tillamook County
 - Cannon Beach
 - Hood River County
 - Hood River City
 - Newport
 - Medford
 - Milwaukie
 - Bend (*grandfathered program from before legislation*)
-

¹ This list is based on ECONorthwest research as of April 2020 and may not be exhaustive.

² Oregon Revised Statute 320.173

Pros

- Flexible funding source, especially for funds derived from commercial/industrial development.
- Can be blended with other City funds to maximize impact.
- Ability to link industrial or other employment investments, which generate new jobs and demand for new housing, with funding for housing development.
- Allows some use of funds for administration; can fund staff time needed to administer programs.

Cons

- CET increases development costs in an environment where many developers are already seeking relief from systems development charges, so it would have impact on project feasibility.
- Where demand is high relative to supply, may be passed on in whole or in part through higher housing costs or higher rents for tenants in new buildings.
- Revenue will fluctuate with market cycles and will not be a steady source of funding when limited development is occurring.

Application in Wilsonville

This section outlines the broad steps that the City might take in evaluating the establishment of a CET in the City.

1. Develop and Analyze Program Scenarios

To better understand and select among the options available through the statutes, the City should evaluate a number of scenarios that are tailored to the Wilsonville market and the specific program design.

- Should the CET apply to both residential and commercial / industrial development?
- What rate would be appropriate for each type of development included, balancing revenue generation with impacts to development feasibility?
- What exemptions might the City want to establish, in addition to those required under statute (see above)? For example, would the City want to exempt projects under a certain size or permit value, certain housing types, or a broader definition of affordable housing?

Using the historical and projected residential building permit values, the City could analyze the average revenue it would generate with a CET by use, per the statutory rate cap and spending limitations.

	Residential	Commercial/Industrial
Rate Cap	The statutory rate cap is 1%. The City could look at rates of 0.5% to 1% of permit value.	Given that the rate is uncapped, the City could evaluate a range of CET rates (e.g., 0.5%, 1%, 2%, and 5%).
Spending Limitations	50% - developer incentives 35% - affordable housing programs, as defined by the jurisdiction 15% - Oregon Housing and Community Services for homeowner programs	50% - developer incentives 50% - unrestricted

Source: Oregon Revised Statutes 320.195 (4)

A key question for the program structure will be how the City can structure the CET so that it would not provide a great disincentive to new market-rate development that would otherwise pencil without the CET.

2. Determine How the City Would Use CET Revenues

Because CET is dependent on new construction, revenue will vary with market cycles. The City should consider reasonable assumptions for budgeting purposes and define priorities for the portion of the revenue that may be used flexibly. Consistent with implementation of this Plan's actions, Council would determine what types of incentives it would want to fund with the money dedicated to developer incentives (e.g., a tax abatement, SDC waiver, direct grants, land write-downs, etc.), funds for affordable housing, and any unrestricted funds.

If the City were to establish a CET on commercial and industrial development, there may be demand from other City priorities and programs for the unrestricted portion of the revenue, which would reduce the amount available for affordable housing. The City could consider dedicating CET to actions that are focused on reducing displacement that could also withstand the variability in CET revenue generation, such as emergency short-term rent vouchers.

As part of these conversations, the City should consider how it would administer the program, and what staffing and partnerships would be needed to implement the programs identified.

3. Seek Stakeholder Input

The City should seek input from local developers and business leaders regarding the potential impact of a CET on development activity and business recruitment. To ground these conversations, the City can evaluate recent development examples and calculate what the CET costs would have been. It may also be helpful to conduct additional outreach to affordable

housing providers to help the City understand how best to administer funding if a CET is adopted.

4. If Applicable, Carry Out Adoption Process

If the City chooses to adopt a CET, it must pass an ordinance or resolution that states the rate and base of the tax.³ Most communities also identify any further self-imposed restrictions on the use of funds as part of the adopting ordinance (e.g., establishing that the housing programs will support housing affordable up to a certain percentage of area median income, or specifying the allowed uses of unrestricted funds). If the ordinance passes, the City must then establish a process to distribute the funds.

³ ORS 320.192

Appendix D: All Actions Evaluated

This information was part of the presentation materials for the September 4, 2019 Task Force and September 11, 2019 Planning Commission meetings.

To address the community's housing needs now and in the future, the City of Wilsonville has identified the need to establish a roadmap toward a more equitable housing system. This memorandum provides a menu of potential actions that the City can take to advance its Equitable Housing Strategy.

The tools outlined in this document fall under the following categories:

- A. Programs to Fund or Reduce Costs for Housing Development or Preservation
- B. Development/Permitting Incentives and Regulatory Reform
- C. Outreach and Coordination
- D. Property Tax Abatement Programs
- E. Affordability Requirements
- F. Homeownership Programs
- G. Anti-Displacement and Renter Support Tools
- H. Ownership or Sale Requirements

A. Programs to Fund or Reduce Costs for Housing Development or Preservation

Grants/Loans for New Development and Preservation. Investments intended to help regulated and unregulated properties with development costs, pre-development assistance, loan recapitalization, and/or pay for necessary capital repairs so that land owners can avoid selling to the private market for capital. The City would need to determine funding sources – possible sources include urban renewal, CDBG, Section 108 (up to 80% of MFI).

Reduced or Waived Permit Fees or Systems Development Charges (SDCs) for Affordable Housing. An array of programs that offer reductions or waivers on a project's permit fees or system development charges in order to reduce the cost to build housing. The City already waives SDCs for Accessory Dwelling Units. One option would be to develop a separate fee schedule for the portion of rent-restricted affordable units within a project.

Financed Building Permit and Planning Fees or SDCs. Program to finance permit fees and/or System Development Charges for affordable housing developments.

Expedited and Fast-Track Planning and Building Permit Review for Affordable Housing or Specific Housing Types. Allows for faster development review for affordable housing, or for pre-approved housing development types, thereby reducing time and cost of new development to allow for lower rents to be charged.

Partnerships with Community Land Trusts. There are several community land trust models throughout the country. The model used in the Portland area involves a non-profit, municipal, or other organization that owns land and provides long-term ground leases to low-income households to purchase the homes on the land, agreeing to purchase prices, resale prices, equity capture, and other terms. The City could pursue discussions with Proud Ground, determine the sites it could offer for a CLT, and explore options agreements for voluntary inclusionary zoning in partnership CLT's as part of single family neighborhood development.

SMART/WES Property Development. The two- to three-acre City-owned property near Wilsonville's WES transit station is the City's main opportunity to promote Transit-Oriented Development for affordable and/or workforce housing. Potential support could include development/permitting incentives or a public-private partnership that would provide development or infrastructure subsidies in exchange for fulfillment of community goals.

City-Led Land Acquisition Strategy and Land Banking. City-led program to buy and hold land for future development opportunities. This supports affordable housing by reducing or eliminating land cost from development.

City-Supported Employer-Assisted Housing. Employer-assisted housing programs help employees meet their housing needs, which in turn helps employers to achieve their business goals. The City's role could be to provide subsidies, convene employers with other players in the housing sphere, or partner in development.

B. Development/Permitting Incentives and Regulatory Reform

Development of Requirements and Policies for Master Planning Efforts in Frog Pond East and South. Frog Pond East, West, and South are the main areas where the City expects new housing development. Frog Pond West has a master plan, but Frog Pond East and South do not. Those areas will likely be developed through a series of Planned Unit Developments. As part of its planning, the City should determine what kinds of affordability and unit type requirements to consider as a part of the master planning requirements for Frog Pond East and South.

Implementation of Oregon House Bill 2001 (Middle Housing). Oregon House Bill 2001 requires that local jurisdictions adopt zoning code regulations or comprehensive plan amendments to permit middle housing types (e.g., duplexes, triplexes, etc.) in all areas that are zoned for residential use and allow for detached single-family dwellings. These changes will allow for a diversity of unit types throughout Wilsonville, but the City will need to assess its own plans for future planning areas for Frog Pond as well as the restrictions in each of its existing neighborhoods that have HOAs.

Accessible Design Standards Incentives. Incentives for visitability, adaptability, and accessibility. This could include incentives encouraging universal design.

Incentives for Space-Efficient Housing. Provides development standards that allow certain types of housing such as cottage clusters, internal division of larger homes, duplexes, and accessory dwelling units. This could include increased density and/or height for regulated affordable housing and/or for housing types that tend to be lower cost (e.g., cottage homes, duplexes/triplexes, etc.) Consider including as part of new development agreements. Follow up actions include fact-finding with existing Homeowners' Associations about whether ADUs are allowed within CC&Rs.

Reduced Parking Requirements for Affordable Housing or Housing Near High-Capacity Transit. Development standards that reduce the required number of parking spaces for affordable housing and/or housing near high-capacity or rapid transit. There is a potential to limit to subsidized units.

C. Outreach and Coordination

Track Market Conditions. To support successful program implementation, the City can enhance its tracking of the residential real estate market, such as RMLS, Zillow, Multifamily NW, and Co-Star. This will help the City to understand where change is occurring and help the City to better target its resources.

Outreach with Non-Profit Affordable Housing Developers. Proactively seek out connections to regional developers looking for infill and other development opportunities. Potential organizations include: REACH CDC, Habitat, Northwest Housing Alternatives.

Outreach with Market-Rate Developers. Proactively seek out connections to regional developers looking for infill and other development opportunities. This could include a public relations strategy about possible opportunity sites available, developer tours, and increased participation in housing-related real estate events so that the City can better understand development activity within the region.

Better Connections to Clackamas County's Housing Bond Implementation. Increase coordination and communication on the Metro Affordable Housing Bond.

D. Property Tax Abatement Programs

Multiple-Unit Limited Tax Exemption Program. Incentivizes high-quality, mixed-use, and diverse housing options by selecting a development to award a property tax exemption.

Vertical Housing Tax Abatement. Subsidizes mixed-use development by providing a partial property tax exemption on increased property value for qualified developments.

Tax Abatement for New and Rehabilitated Multifamily Rental Housing. Offers a full property tax abatement for up to 10 years for multifamily rental housing affordable at up to 120% of Area Median Income. The City sets the length of exemption based on percent of units meeting affordability criteria.

Nonprofit Affordable Housing Property Tax Abatement. The Oregon legislature authorizes a property tax exemption for low-income housing (60% MFI and below) held by charitable, nonprofit organizations only.

Low-Income Rental Housing Property Tax Abatement. The Oregon legislature authorizes a property tax exemption for new rental housing exclusively for low-income households (60% MFI and below). Housing need not be owned or operated by a nonprofit entity.

E. Affordability Requirements

Inclusionary Zoning. Incent or requires developers to set aside a certain share of new housing at a price affordable to people of low or middle income.

F. Homeownership Programs

Education on Home Ownership Preparation. Help first-time homebuyers learn the basics about the home buying process in classes taught by experienced professionals who specialize in helping first-time homebuyers. Special topics on HOAs can be included. The City could coordinate with existing organizations such as the Portland Housing Center to facilitate this training or develop its own program.

Alternative Funding Sources for Down Payment and Mortgage Assistance. Expand financing options to low-income and middle-income households who plan to purchase a home.

G. Anti-Displacement and Renter Support Tools

Create Better Linkages to County Support Services for Renters. Create formal structures with County to better provide resources and technical assistance for tenants: (1) Provide connections to the County mediation process in which people work with a neutral professional to facilitate a mutually beneficial, binding resolution, (2) work with County on trainings, counseling services, resource fair, website resources to help residents to gain familiarity with landlord-tenant law and information needed to know their rights, (3) provide information on existing local rent assistance programs.

Monitor Implementation of State Rules on Rent Control and Evictions. City staff can monitor and understand how Senate Bill 608 is being implemented within the City. This landmark law fundamentally changes landlord-tenant laws by regulating how and when Oregon landlords can increase rents, sets limitations on when landlords can use evictions, and requires landlords to pay relocation payments to tenants in certain circumstances.

Mediation That Supports Residents to Remain in Their Homes. The City could provide its own mediation services for homeowners facing foreclosure to resolve the issue with the mortgage by mutual agreement before a default judgment or foreclosure sale is reached.

City-Led Landlord Counseling. Support landlords towards successful property management by providing education services that inform landlords of their rights and responsibilities, coach them on best practices, and assist in resolving disputes. This could also incorporate better connections to County resources.

Landlord Accountability and Support. Explore options to partner with – and hold accountable – landlords whose properties generate disproportionate complaints from tenants. Examples include strong code enforcement and a rental housing inspection program.

City Database of Rental Buildings. The City could create a database of rental buildings to provide data for programs to (1) support renters and (2) watch for opportunities to preserve housing that may be sold or may see rents increase.

Short-Term Assistance for Upfront Rental Costs. Create a Wilsonville-specific program for upfront rental costs.

Platforms to More Easily Find a Place to Live. Create a single place to find housing and submit a rental application, such as OneAppOregon.com.

Designate “Front Door” Staff at City Hall. Designate staff that are available for referrals, community housing training, etc. A possible role could be connecting employees to housing opportunities.

H. Ownership or Sale Requirements

Policies Requiring or Incenting Purchase Rights to Nonprofits or City (First Right of Refusal Policies). Policy that would require landlords to notify cities and/or nonprofits of the intent to sell so that the cities/nonprofits have the ability to purchase land/properties before they turn to market rate (important for low-cost, market-rate housing).

Policies Requiring Notification of Expiring Contracts. Policy requiring that rent-regulated properties coming upon their regulatory expirations notify cities or nonprofits (again to enable cities/nonprofits to purchase the properties before they turn to market rate).

Appendix E: Property Tax Abatement Programs for Housing in Oregon

Oregon has several property tax abatement programs that can be used to support development of affordable housing or to leverage private housing development to provide benefits (e.g., a portion of units at reduced rents, or ground floor retail in key areas) that the market may not deliver on its own. Each program differs in the type of housing it incents (eligibility criteria), the geographic specificity, and other policy parameters:

- **Vertical Housing Development Zones (VHDZ):** Incent multi-story mixed-use development by offering a partial property tax exemption for 10 years to developments that include housing as well as non-residential use (e.g., retail on the ground floor), with a larger tax exemption for higher density developments. Overlapping taxing districts can opt out.
- **Multiple Unit Property Tax Exemption (MUPTE, sometimes called MULTE):** Can be used to incent multifamily housing with particular features or at particular price points by offering qualifying developments a partial property tax exemption for 10 years (or longer, for housing subject to affordability agreements). Limited to adopting jurisdiction's taxes unless there is sufficient support from overlapping taxing districts.
- **Low-Income Rental Housing Exemption:** Provides a 20-year, renewable property tax exemption for rental housing for low-income households (60% of area median income and below). Housing need not be owned or operated by a nonprofit entity; if it is not, only housing built after the program is adopted is eligible. Limited to adopting jurisdiction's taxes unless there is sufficient support from overlapping taxing districts. Requires that savings be passed on to tenants through rent reductions.
- **Nonprofit Low-Income Rental Housing Exemption:** Provides a full property tax exemption for new and existing affordable housing owned and operated by a nonprofit organization for as long as the property meets eligibility criteria. Also applies to land held by a nonprofit for future affordable housing development. Limited to adopting jurisdiction's taxes unless there is sufficient support from overlapping taxing districts.
- **Temporary Exemption for Newly Rehabilitated or Constructed Multiunit Rental Housing:** Incent development or rehabilitation of multifamily rental housing with rents affordable to households with an annual income at or below 120% of area median income citywide through a full property tax abatement for no more than 10 years. Does not take effect unless there is sufficient support from overlapping taxing districts.
- **Homebuyer Opportunity Limited Tax Exemption (HOLTE):** Provides a 10-year property tax exemption for the structural improvements of a new or rehabilitated single-unit housing. Available for properties valued at no more than 120% of the median sales price. Allows each city to determine its own income and owner-occupancy requirements.

The following sections describe each program and its pros and cons. To facilitate comparison between programs, key features and differences of the programs are summarized in Exhibit 1 on page.

Vertical Housing Development Zones (VHDZ)

How It Works

This program incents mixed-use development and affordable housing by partially exempting property taxes for qualifying projects. The exemption varies in accordance with the number of residential floors in a mixed-use project; the maximum property tax exemption is 80% of the residential improvement value over 10 years. An additional property tax exemption on the land may be given if some or all of the housing is for low-income persons (80% of area median income or below). There is no tax exemption on the non-residential component.

Before a city or county can grant an exemption for an eligible development project, they must establish a VHDZ. Per state statute, jurisdictions must consider the potential for displacement¹ of households within a proposed vertical housing development zone before designating the zone. Once the VHDZ is established, the developer may apply for the city's Vertical Housing Tax Abatement Program.

Pros

- Targeted tool to support mixed-use development in places with locational advantages.
- Overlapping taxing districts must take action to opt out, rather than having to take affirmative action to approve zone designations and project applications.
- Offers incentives for market-rate, mixed-income, and affordable housing, with greater incentives for affordable/mixed income housing.
- Incents higher density development as well as mixed-income development.

Cons

- May provide insufficient incentive to lead to affordability unless paired with other tools.

¹ According to the relevant statute (ORS 307.841(2)): "Displacement" means a situation in which a household is forced to move from its current residence due to conditions that affect the residence or the immediate surroundings of the residence and that: (a) A reasonable person would consider to be beyond the household's ability to prevent or control; (b) Occur despite the household's having met all previously imposed conditions of occupancy; and (c) Make continued occupancy of the residence by the household unaffordable, hazardous or impossible.

In evaluating this issue for other communities, ECONorthwest has considered the potential for displacement because of redevelopment of existing housing with new development using the VHDZ program ("direct displacement"), and the potential that the presence of new development that uses the VHDZ program could encourage property owners to increase rents in existing housing to a degree that the households can no longer afford them ("indirect displacement").

- Requires retail space, which may not be viable or appropriate for all projects, and can be particularly challenging for publicly-funded, affordable housing projects.
- Can't qualify until project is under construction—creates uncertainty for developer & lenders
- Reduces general fund revenues for all overlapping taxing districts (unless they opt out).

Best for:

- Encouraging mixed-use development in locations where ground-floor commercial uses are essential to the vision and mixed use is not economically feasible yet.

Implementation Considerations

- Both ground-floor retail and multifamily rental housing must be allowed, appropriate, and potentially desirable to tenants for the program to be effective.
- The program works better for taller development (at least 4 stories tall) since the incentive is very limited for lower-scale development. It should be applied in places where this is allowed, desirable, and close to being feasible, given the higher cost of such development relative to 2- to 3-story housing or single-story retail.
- Expect market-rate development through this program, if any development occurs because of it—there is little or no history of it being used for affordable housing in Oregon. Also consider how any affordability restrictions will be monitored and enforced.

Multiple Unit Property Tax Exemption (MUPTE)

How It Works

Through a multiple unit property tax exemption, a jurisdiction can encourage multifamily and attached housing in specific locations lacking in housing choices, or inclusion of units with below-market rents. The abatement applies to improvement value only and lasts for 10 years, except for affordable housing, which lasts as long as the affordability restriction lasts. 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, eligibility criteria (including required public benefits), program requirements, application process and fees, and program cap.

The City can select projects on a case-by-case basis through a competitive process. Applicants must show that the housing would not be feasible without the abatement.

To implement the exemption, the City would take the following steps:

- (1) Determine desired eligibility criteria (percentage of affordable or workforce housing or other public benefits, where the program applies, etc.).

- (2) Seek agreement from taxing districts representing 51% or more of the combined levying authority on the property to include all of the taxing jurisdictions in the abatement. If the City is unable to get agreement from other taxing districts, the abatement will only apply to the City's portion of property taxes.
- (3) Establish annual reporting and administration procedures.

Pros

- City sets eligibility criteria and controls application process and project selection.
- Program is flexible to support various objectives related to encouraging housing.
- Tax abatements can contribute to the feasibility of both market-rate and regulated units. Saving on operational costs contributes to greater net operating income, which is important in determining project value and subsequently the development feasibility.
- The City can use the abatement program to incent private development to include some affordable units, or to incent higher density housing or other specific types of housing not being delivered by the market.
- Since applicants need to prove that the project would not be feasible without the exemption, the funding theoretically only goes to developments that would not have otherwise occurred.
- Property owner can apply by the February before first assessment year of requested exemption. Construction need not be complete.
- The City can set an annual cap on the total amount of tax exemptions in any given year for all projects.

Cons

- May provide insufficient incentive to lead to affordability unless paired with other tools.
- Discretionary application process creates uncertainty during the development stage and more work for applicants. Some developers will be discouraged from applying.
- Can be difficult for the City to validate applicants' claims that the development would otherwise not be feasible.
- Depending on the project criteria, can be a highly competitive process among development projects.
- City must weigh the temporary (up to 10 years) loss of tax revenue against the potential attraction of new investment to targeted areas.
- Reduces general fund revenues for all overlapping taxing districts, which could make it harder to promote the tool to partner jurisdictions that do not perceive the same project benefits.
- Must get affirmative support from enough overlapping taxing districts to apply to their tax collections.

Best for:

Encouraging multifamily housing with specific features (with or without ground floor commercial uses) in strategic locations, or supporting development of housing affordable to moderate-income households (e.g., around 80% AMI where the rent discount relative to market rates is limited).

Implementation Considerations

There are multiple ways a City could implement this tool, which will require additional staff and stakeholder conversations to determine which application is most appropriate.

- The City could offer a citywide program for housing that is affordable to households making up to some specific income level (e.g., 80% or 100% of AMI). If the City were to require income certification of tenants, this would require a lot of paperwork for developers. If the affordability threshold is relatively close to current market rents, the City could limit the rent the developer could charge but not require income certification for tenants. This would be less burdensome for all involved but would not guarantee that the units would go to those that need them most, and would offer little discount relative to market-rate development. Also, the City should consider how affordability restrictions will be monitored and enforced—whether City staff has capacity for this, or whether there is an appropriate and willing partner to assist.
- The City could offer abatements for market-rate apartments that meet public goals and are not being produced by the market today. This could include higher-density development adjacent to transit or downtown, development that meets certain green building or sustainability goals, etc. In some markets, any multifamily rental housing development at scale is a challenge due to low market rents and difficult financing, and the program may be appropriate with minimal eligibility criteria.
- The abatement could be applied to certain middle housing types like duplexes, triplexes, cottage clusters on a common lot, etc. in neighborhoods close to transit or services. It will be most effective for rental properties, and should not be tied to affordability requirements without careful consideration of whether those will work for middle housing.
- Regardless of how the City chooses to apply the program, it could set a limit on the total amount of abatement granted per year or at any given time in order to limit fiscal impacts to the City and other taxing districts.

Low-Income Rental Housing Exemption

How It Works

Provides a 20-year, renewable property tax exemption for rental housing exclusively for low-income households (60% of AMI and below). Housing need not be owned or operated by a nonprofit entity. The program is limited to housing built after the program is adopted, except for existing housing owned by a nonprofit. The exemption is limited to the adopting jurisdiction's taxes unless there is sufficient support from overlapping taxing districts. Rents within the eligible properties must be reduced to reflect the full value of the property tax abatement. The exemption can also apply to land held for future affordable housing development, up to whatever time limit the City sets. If only a portion of a given property is used for qualifying, low-income housing (e.g., a mixed-use or mixed-income development), the exemption is applied only to the qualifying portion of the property. This program offers one of few options for private affordable housing development to receive a property tax exemption.

Pros

- Housing need not be owned or operated by a nonprofit entity.
- No requirement that construction be complete prior to application.
- Reduces carrying costs before development occurs (tax exemption available for land being held for development of affordable units).
- Reduces costs for low-income residents by passing through savings in reduced rents.
- Demonstrates local support for affordable housing development, which can make projects more competitive for state and federal funds.
- Allows a city to adopt additional criteria, such as a cap on the number of eligible properties or on the amount of lost tax revenue.

Cons

- Because the full savings must be passed through to residents, the exemption does not improve feasibility or reduce costs for the developer.
- In most affordable housing development using state and federal subsidies, rents are set based on a percentage of the household's income using formulas set by state or federal agencies. Building in an additional reduction based on the tax exemption and determining how to distribute savings among tenants with different unit sizes and incomes creates additional complexity and requires the City to monitor compliance with that aspect of the program.
- Complex to apply to mixed-income housing, since the abatement is pro-rated to apply to the portion of the property that meets the criteria. Even housing funded with Low Income Housing Tax Credits can sometimes have a mix of income levels that includes households with incomes above 60% of area median income.

- The 20-year duration does not align well with the 15- and 30-year compliance periods for the Low Income Housing Tax Credit program, which is a likely source of funding for property that would qualify for this exemption.
- Reduces general fund revenues for all overlapping taxing districts if properties that would not otherwise have received an exemption are approved through the program.
- Must get affirmative support from enough overlapping taxing districts to apply to their tax collections.

Best for:

Lowering rent burdens for residents of affordable housing in jurisdictions with a sophisticated affordable housing program.

Implementation Considerations

- Although not required in statute, most cities conduct ongoing monitoring or enforcement to confirm ongoing eligibility.

Nonprofit Corporation Low Income Housing Exemption

How It Works

This program provides an opportunity to assist nonprofits providing affordable housing in the community by lowering operating costs. It applies to rental housing for low-income persons² that is owned, being purchased, and/or operated by a nonprofit. It can apply to land held for affordable housing development, existing affordable housing, or new construction. Both land and improvement value (if any) are exempt. The exemption can be granted for as long as the property meets eligibility criteria, but the property owner must reapply on an annual basis to demonstrate on-going eligibility. For land held for future affordable housing development, the City sets a limit on how long the exemption can apply, with the option for property owners to apply for an extension after that time. This program offers one of few options for nonprofit affordable housing development to receive a property tax exemption.

Pros

- The abatement can be used for most nonprofit affordable rental housing development.
- Can apply to both existing and new housing.
- Reduces carrying costs before development occurs (tax exemption available for land being held for development of affordable units), and offsets operational costs once the development is complete, reducing feasibility gaps.
- Allows a city to adopt additional criteria, such as a cap on the number of eligible properties or on the amount of lost tax revenue.

² Incomes must be at or below 60% of area median income (AMI) to start, and up to 80% AMI in subsequent years.

Cons

- Must get affirmative support from enough overlapping taxing districts to apply to their tax collections.
- Reduces general fund revenues for all affected taxing districts.
- Limited applicability / eligibility, since it does not apply to mixed-income housing or affordable housing built by for-profit developers.
- The requirement for the property owner to resubmit eligibility documentation every year may be burdensome, though a streamlined application process can mitigate this.

Best for:

Reducing operating costs for regulated affordable rental housing developed by nonprofits.

Implementation Considerations

- Because this exemption applies to both new construction and existing housing, it has the potential to cover more properties and have a greater impact on a city's tax revenues.
- Little or no additional monitoring or enforcement is likely needed for this program, since eligibility is limited to nonprofit affordable housing providers and the annual application process provides evidence of eligibility.
- If part of an eligible property is used for purposes other than low-income housing (e.g., a commercial use or mixed-income housing), the exemption is pro-rated.

Temporary Exemption for Newly Rehabilitated or Constructed Multiunit Rental Housing

How It Works

This program provides a maximum 10-year tax abatement for newly rehabilitated or constructed multiunit rental housing that is affordable to households with an annual income at or below 120% of area median income. The tax abatement applies to the full property tax amount—land and improvements.

A city must establish a schedule that provides longer exemptions for projects with more qualifying units, with a maximum of 10 years. To establish this tax abatement, a city adopts an ordinance or resolution and must establish definitions of affordability and duration of exemption. Overlapping taxing districts must agree. Specifically, the city must:

- (1) Create an ordinance to adopt a schedule establishing the length and percentage of the exemption based on the number of affordable units.
- (2) Define the terms “area median income” and “affordable” for families of varying sizes.

- (3) Seek agreement from taxing districts representing 51% or more of the combined levying authority on the property. If the city is unable to get agreement from other taxing districts, the abatement cannot take effect.

Pros

- Properties must re-apply every year, which provides a built-in enforcement mechanism. This is not overly burdensome since they only need to show that they continue to meet the criteria, which are non-discretionary.
- All properties that meet eligibility criteria must be granted the exemption, reducing uncertainty for developers.

Cons

- Little ability to tailor the program to offer greater benefits to projects that are more desirable, and all eligible projects get the exemption.
- With market rents even for new construction generally already affordable at or below 120% of area median income, this would offer as much of an incentive for market-rate development as for affordable housing development.

Best for:

Incenting market rate / moderate-income multifamily housing development city-wide.

Implementation Considerations

- The City may run into more concerns among local tax jurisdictions with this program due to the temporary loss of tax revenue (because land value is exempted in addition to improvement value) and because there are so few limits on the program.
- In markets where any multifamily rental housing is needed, and market rents are already affordable at or below 120% of AMI, this program may make sense as a developer-friendly and streamlined alternative to MUPTE. The sliding scale for number of years of abatement for the percent of units affordable at or below 120% AMI will be irrelevant in this case.
- In markets where typical rents for new construction are well above 120% of AMI, this program could potentially make sense as a way to incent lower rents for market-rate housing or inclusion of some below-market units, but without income qualification (which the program does not require), there is no guarantee they would go to those that need them most.
- While income qualification is not required, consider whether staff has capacity to review annual submittals detailing rents for compliance with program requirements.

Homebuyer Opportunity Limited Tax Exemption (HOLTE)

How It Works

The purpose of this program is to encourage homeownership among low- and moderate-income households. As authorized by ORS 307.651 through 307.687, a rehabilitated or newly constructed eligible unit types can be granted the tax exemption for up to 10 years for the value associated with the property's structural improvements, but not the land value. The property values for the structural improvements and the land are reassessed at the end of the exemption period. Eligible building types include single-family housing units, multifamily homeownership units (e.g., condos and townhomes), and manufactured housing. Effective October 2017, the law was expanded to allow for exemptions for low- and moderate-income homebuyers of existing homes and low-income property owners at risk of losing their homes.³

At the time of the application, the market value for the land and the improvements must be no more than 120% of the median sales price of single-unit housing in the city, though some cities may opt for a lower threshold. Each city can formulate the eligibility criteria, required design elements, and public benefits that would be applied to properties using the exemption.

The City of Portland employs this limited tax exemption as the "Homebuyer Opportunity Limited Tax Exemption," which provides a ten-year property tax exemption for structural improvements to single-unit housing with at least three bedrooms and single-unit housing with two bedrooms in transit-oriented areas. The program is highly competitive; only 100 units can be approved each year, though properties with long-term affordability covenants are exempt from this cap. The units must be occupied by the owners as their primary residence. Eligibility requirements restrict the incomes of homeowners to 100% of AMI for a family of four. If a housing unit transfers ownership during the 10-year exemption period, the new homebuyer must meet the affordability and owner-occupancy requirements of the program to be eligible. The City of Portland also specifies design standards and requires participation in a green building program.

Pros

- Helps to buy down ongoing housing costs for prospective purchases and opens up the pool of buyers.
- Lowers the expenses of qualifying, low-income homeowners.
- Can be used in conjunction with other incentives (e.g., SDC waivers) and homeownership programs (e.g., down payment assistance programs and mortgage credit certificate programs).
- Can be used to accomplish other development goals, such as green buildings and transit-oriented development.

³ HB 2964. Oregon Legislative Information. <https://olis.leg.state.or.us/liz/2017R1/Measures/Overview/HB2964>

- May incent developers to include more middle housing in development plans than may have otherwise occurred.

Cons

- Ongoing administrative requirements include annual application process and ongoing monitoring to ensure owner-occupancy.
- Requires coordination with other taxing districts (including Clackamas County) representing 51% of taxing authority with ongoing agreement for a total estimate of foregone revenue.

Best for: Encouraging affordable homeownership and stabilizing low- and moderate-income families in single- and two-unit homes.

Implementation Considerations

- City should consider setting a limit for foregone revenues on an annual basis, or an annual unit cap.
- City must maintain an annual application process.
- City must monitor and publish median sales price of single-unit dwellings every year.

Exhibit 1. Housing Tax Exemption Program Comparison

Program	Vertical Housing Development Zones (VHDZs)	Multiple-Unit Property Tax Exemption (MUPTE)	Low-Income Rental Housing Exemption	Nonprofit Low-Income Rental Housing Exemption	Temporary Exemption for Newly Rehabilitated or Constructed Multiunit Rental Housing	Homebuyer Opportunity Limited Tax Exemption
Authorizing Statute	ORS 307.841 to 307.867	ORS 307.600 to 307.637	ORS 307.515 to 307.535	ORS 307.540 to 307.548	HB 2377 / chapter 624, Oregon Laws 2017 ¹	ORS 307.651 to 687
Adoption / Designation Process	City designates via ordinance or resolution. Notice to overlapping taxing districts required. Must consider potential for displacement of households in the zone.	City designates via ordinance or resolution. Public hearing required to determine whether qualifying housing would or would not be built without the benefit of the program. City must establish standards and guidelines with requirements for eligibility.	City adopts an ordinance or resolution. City sets any additional local requirements.	City adopts an ordinance or resolution. City must select one of two definitions of affordability and set any additional local requirements.	City adopts an ordinance or resolution. City must establish definitions of affordability and duration of exemption. Overlapping taxing districts must agree (see below).	City adopts an ordinance or resolution.
Participation by Other Taxing Districts	Can elect not to participate within 30 days from City notice	None, unless districts representing at least 51% of combined levy agree by board resolution to participate, in which case all districts are included.	None, unless the boards of districts representing at least 51% of combined levy agree to the exemption for a given property, in which case all districts are included	None, unless the boards of districts representing at least 51% of combined levy agree to the exemption for a given property, in which case all districts are included.	Exemption cannot take effect unless governing bodies representing at least 51% of the total combined tax rate (when combined with the City's tax rate) agree to grant the exemption.	Exemption cannot take effect unless governing bodies representing at least 51% of the total combined tax rate (when combined with the City's tax rate) agree to grant the exemption.
Eligible Areas	Within designated areas. City may designate any area it chooses. ²	Within designated areas such as core areas, ³ light rail station areas, transit-oriented areas (within a quarter-mile of fixed-route transit service per a local transportation plan), or Urban Renewal Areas. Alternatively, the City can designate the entire City and limit the program to affordable housing.	Anywhere in a city	Anywhere in a city	Anywhere in a city	Anywhere in a city

Program	Vertical Housing Development Zones (VHDZs)	Multiple-Unit Property Tax Exemption (MUPTe)	Low-Income Rental Housing Exemption	Nonprofit Low-Income Rental Housing Exemption	Temporary Exemption for Newly Rehabilitated or Constructed Multiunit Rental Housing	Homebuyer Opportunity Limited Tax Exemption
Eligible Projects / Properties	Must include at least one “equalized floor” of residential; at least 50% of the street-facing ground-floor area must be committed to non-residential use. Can be new construction or rehabilitation. City can add other criteria.	Housing subject to a housing assistance contract with a public agency (must show that the exemption is necessary to preserve or establish the low-income units, but the statute does not define an income threshold); OR housing that meets City-established criteria for design elements benefitting the general public and number of units. If transit-oriented, must support the transit system. May be new construction, addition of units, or conversion of existing building to residential use.	New rental housing exclusively for low-income households (60% of area median income and below). Housing need not be owned or operated by a nonprofit entity. Existing nonprofit-owned housing can also qualify. Rents must reflect the full value of the property tax abatement. City can add other criteria.	New rental housing exclusively for low-income households (at or below 60% AMI); rental housing for low-income persons (at or below 60% AMI) that is owned, being purchased, and/or operated by a nonprofit; ⁴ or land held for affordable housing development. Rents must reflect the full value of the property tax abatement. City can add other criteria.	Newly rehabilitated or constructed multiunit rental housing. Rental units affordable to households with an annual income at or below 120% of AMI.	Existing or new construction single-family, townhome, or condominium with an annual income at or below 120% of AMI.
Extent of Tax Exemption / Abatement	Improvements exempt based on number of “equalized floors” of residential use: 20% for 1 floor, 40% for 2 floors, 60% for 3 floors, 80% for 4 floors. Land partially exempt for low-income housing (up to 80% AMI) – same % per floor as above.	Improvements exempt. Exemption does not apply to commercial components unless required as a public benefit element.	Land and improvements exempt.	Land and improvements exempt.	Full property tax levy of all taxing districts.	Improvements exempt.

Program	Vertical Housing Development Zones (VHDZs)	Multiple-Unit Property Tax Exemption (MUPTE)	Low-Income Rental Housing Exemption	Nonprofit Low-Income Rental Housing Exemption	Temporary Exemption for Newly Rehabilitated or Constructed Multiunit Rental Housing	Homebuyer Opportunity Limited Tax Exemption
Duration of Tax Exemption / Abatement	Exemption is for 10 years (this is set in statute, not by the City).	Exemption is for up to 10 years (this is set by statute, not by the City), except that for low-income housing, exemption can be extended for as long as the housing is subject to the public assistance contract.	Exemption lasts 20 years, but can be renewed.	Must be applied for every year, but can continue as long as the property meets the criteria.	City must establish a schedule that provides longer exemptions for projects with more qualifying units, with a maximum of 10 years.	Maximum of 10 years
Where in use⁵	<p>Program Established and Tax Abatements Granted: Tigard, Hillsboro, Beaverton, Milwaukie, Gresham</p> <p>Program Adopted: Oregon City, Wood Village, Forest Grove, Stayton, Springfield, Cottage Grove, Monmouth, La Grande, The Dalles, Canby, Central Point, Klamath Falls, Roseburg, Grants Pass, Medford, Eugene</p>	Portland, Eugene, Salem, Newport	Springfield, Eugene, Bend	Newport, Beaverton, Portland, Tigard, Forest Grove, Cornelius, Wilsonville	None identified to date	Portland

¹ The text is included following ORS 307.867 in the online version of ORS Chapter 307, but is not numbered to match the rest of the statute.

² 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 non-residential uses in order to allow development that could be eligible for VHDZ tax abatement.

³ “Core areas” is not defined in the statute. The legislative findings in ORS 307.600 suggest that the intent is for areas around a downtown, but there seems to be discretion for the City to interpret this broadly if desired.

⁴ For the nonprofit corporation low-income housing program, eligibility is housing owned by a nonprofit that is occupied by low-income persons (at or below 60% AMI to start, and up to 80% AMI in subsequent years).

⁵ This list is based on the best information available to ECONorthwest in April 2020, but it may not be exhaustive.

Resolution No. 2820
Exhibit B
Planning Commission Record

Please visit the link below to download Exhibit B
Planning Commission Record:

https://www.ci.wilsonville.or.us/sites/default/files/fileattachments/city_council/meeting/28391/d_res_no_2820_exhibit_b-6.1.2020.pdf

Attachment 2 – Errata Sheet

In conducting a final review of the final draft Equitable Housing Strategic Plan, staff has noted the following clarifications from the Planning Commission recommendation. The following modifications have been included within Resolution No. 2820, Exhibit A. New proposed language is in ***bold italics***, deleted language has been ~~struck through~~.

General: Group and retitle Chapters 4 and 5 into one chapter, “Equitable Housing Actions”; renumber subsequent chapter

Page 4: Prior to the COVID-19-induced economic shock, ~~like much of the West Coast,~~ Wilsonville residents, ***like people on much of the West Coast***, were experiencing a housing crisis.

Page 10: While stakeholders recognized that Wilsonville has a large share of multifamily units, the city lacks older, market-rate rental housing that depreciates over time ~~to become less~~ ***expensive***.

Page 28: Saving on operational costs contributes to greater net operating income, which is important in determining project value and ~~subsequently the~~ development feasibility.

Page 29: Identify ~~specific~~ geographies where specific abatements would be most effective.

Page 35: The CLT attaches a deed restriction that requires the family to “pay it forward” when they sell the home ***by selling the property*** to another qualifying family.

Page 42: How does Wilsonville’s topography limit ~~to ability for~~ ***the development of*** accessible homes, often leading to the need for stairs in site design?

Page 43: Carrying out the actions outlined in this Plan will require the City to continually review potential sources of funding ~~to carry out its implementation actions~~.

Page E-5: Encouraging multifamily housing ~~in strategic locations and~~ with specific features (with or without ground floor commercial uses) ***in strategic locations***, or supporting development of housing affordable to moderate-income households (e.g., around 80% AMI where the rent discount relative to market rates is limited).

Equitable Housing Strategic Plan

City Council Public Hearing
June 15, 2020





Equitable Housing Defined

Equitable housing aims to ensure all people have housing choices that are:

- Diverse
- High quality
- Physically accessible
- Reasonably priced
- Close to opportunities, services, and amenities



Project Purpose

- **2017-19 Council Goal:** Pursue a balanced housing mix with a variety of choices to meet the needs of current and future residents of varying financial levels





Planning Process

Research

Outreach

Policy Prioritization

**EQUITABLE HOUSING
STRATEGIC PLAN**

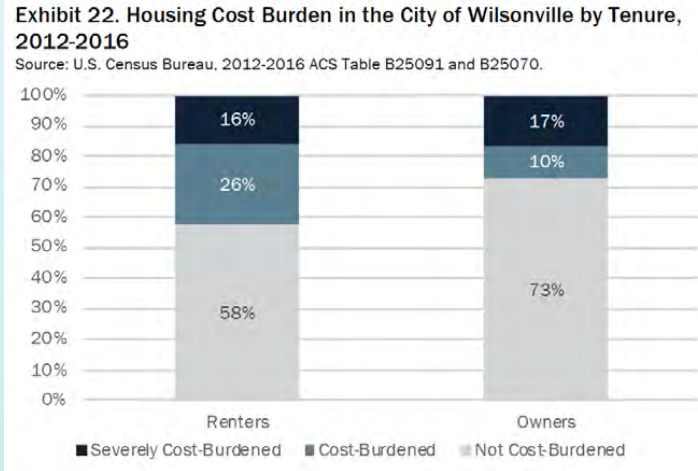




What we learned

From technical research and data:

- Who lives in Wilsonville now
- How housing costs compare to incomes
- Who is likely to live here in the future





Future Housing Types

Shift	What does this mean for future housing types?
More middle-aged Millennials	<ul style="list-style-type: none"> • Homeownership for Millennials will increase • Demand for relatively affordable ownership and rental types near amenities
Constant number of people 60+	<ul style="list-style-type: none"> • Downsizing • Aging in place and multigenerational households • Homes close to services
Increasing share of Latinx households	<ul style="list-style-type: none"> • Larger units, to accommodate larger, multigenerational households • Relatively affordable housing



What we heard

From interviews, focus groups, surveys:

- Why people choose Wilsonville
- Challenges to accessing housing
- Costs and barriers to constructing housing
- Desired housing types and features





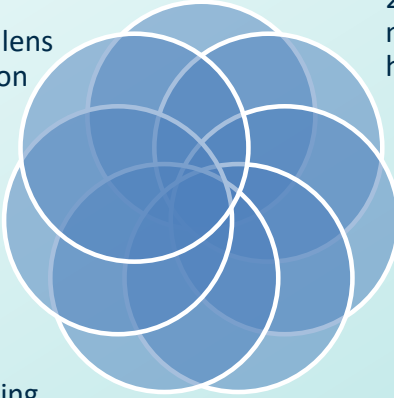
Framework for Action

Created with input from the Task Force,
Planning Commission and City Council:

- **Policy Objectives**
- **Priority Actions**
- **Steps for Implementation**



Policy Objectives

- 
1. Greater availability of a diversity of housing types for a full range of price points to serve the community
 2. Increased partnerships with nonprofit and for-profit housing developers
 3. New and expanded affordable homeownership options, especially for first-time homebuyers
 4. Reduced risk of housing displacement
 5. Targeted housing opportunities in areas with access to services and public transit
 6. Maintenance and expansion of quality subsidized affordable housing stock
 7. Implementation of all housing policies through a lens of social equity and inclusion



Implementation Actions

High-priority actions to initiate within two years of Plan adoption

- 1A** Transit-Oriented Development at City-owned Wilsonville Transit Center
- 1B** Incorporate Needs into Middle Housing Plans
- 1C** Equitable Housing in New Urban Growth Areas
- 1D** Housing Tax Abatement Programs to Achieve Housing Diversity and Affordability
- 1E** Facilitate Connections to Partners and Housing Resources through City Liaison



Other Actions to Explore

High-priority actions that require further research and community discussion

- 2A** Secure Land for Equitable Housing
- 2B** Modify Parking Requirements to Reduce Costs
- 2C** Tactics to Reduce Development Fees/Charges
- 2D** Partner with Community Land Trusts
- 2E** Homeownership Support Programs
- 2F** Housing Preservation Tax Abatement
- 2G** Local Home Repair Programs
- 2H** Accessibility/Visitability Standards and Incentives



Steps for Implementation

- Assemble work plans and resources
- Continue building community relationships and project partnerships
- **TAKE ACTION**
- Track / align / adjust / update



Planning Commission Recommendation

- Adopt Wilsonville Equitable Housing Strategic Plan
- Discussion of equity/inclusion committee





CITY COUNCIL MEETING STAFF REPORT

Meeting Date: June 15, 2020	Subject: Resolution No. 2821 Supplemental Budget Adjustment Staff Member: Cathy Rodocker, Finance Director Department: Finance	
Action Required	Advisory Board/Commission Recommendation	
<input type="checkbox"/> Motion <input checked="" type="checkbox"/> Public Hearing Date: June 15, 2020 <input type="checkbox"/> Ordinance 1 st Reading Date: <input type="checkbox"/> Ordinance 2 nd Reading Date: <input checked="" type="checkbox"/> Resolution <input type="checkbox"/> Information or Direction <input type="checkbox"/> Information Only <input type="checkbox"/> Council Direction <input type="checkbox"/> Consent Agenda	<input type="checkbox"/> Approval <input type="checkbox"/> Denial <input type="checkbox"/> None Forwarded <input checked="" type="checkbox"/> Not Applicable Comments: N/A	
Staff Recommendation: Staff recommends that Council adopt Resolution No. 2821.		
Recommended Language for Motion: I move to approve Resolution No. 2821.		
Project / Issue Relates To:		
<input checked="" type="checkbox"/> Council Goals/Priorities	<input type="checkbox"/> Adopted Master Plan(s)	<input type="checkbox"/> Not Applicable

ISSUE BEFORE COUNCIL:

A supplemental budget resolution for the FY2019/20 budget year.

EXECUTIVE SUMMARY:

Oregon's Local Budget Law allows the Council to amend the adopted budget for an occurrence or condition that was not known at the time the budget was adopted. A transfer resolution moves

expenditures from one category to another within a specific fund and does not increase the overall budget that was approved during the annual budget process. A supplemental budget adjustment can impact the budget by increasing revenues and/or expenditures. The supplemental adjustment can also recognize expenditures that exceed 10% of the adopted budget expenditures or 15% of the adopted contingency in a fund.

The largest supplemental request is for additional funding for the Water Operations Debt Service line item in the amount of \$725K. With interest rates plummeting, the decision was made to pay off the last of the water debt six months early. The fund would have incurred an additional \$12K in interest expense had the payment made on the scheduled due date.

The supplemental being presented also includes budget transfer for the City's COVID-19 emergency response. Early on, Bryan Cosgrove, City Manager, requested each director to review their projected year end budgets and to search for additional budget savings that could be allocated to the City's response. As a result, the \$200,000 estimated expenses presented in the supplemental will be covered by the funds identified by each program. The cost is also reduced by \$27K from grant proceeds received from the City's worker's compensation insurance carrier for specific costs associated with employee safety. Attachment A includes a detail of the funding by program.

Lastly, there are a number of net zero transfers between CIP projects to reallocate funding. Additional funding requests include \$19.7K from the Road SDC Fund for the following projects: Tooze Rd-110th to Grahams Ferry Rd and Exit 283 Congestion Improvements. Both projects are now completed.

EXPECTED RESULTS:

As stated in the Fiscal Management Policies, the City shall amend its annual budget in accordance with Oregon local budget law. The supplemental budget adjustment is adopted by the Council at a regularly scheduled meeting. Convening the budget committee is not required.

TIMELINE:

As required by Local Budget Law, a notice for the public hearing has been published in the Pamplin Media, formerly the Wilsonville Spokesman. The notice was published on Wednesday, June 10, 2020. Adoption of the Supplemental Budget Adjustment is required prior to the end of the fiscal year, June 30, 2020.

FINANCIAL REVIEW / COMMENT:

Reviewed by: CAR Date: 6/3/2020

LEGAL REVIEW / COMMENT:

Reviewed by: ARGH Date: 6/10/2020

COMMUNITY INVOLVEMENT PROCESS:

As required by Local Budget Law, a notice for the public hearing has been published in the Pamplin Media formerly Wilsonville Spokesman. The notice has also been published on the City's website. As the accompanying resolution is a budget adjustment, a public hearing must be part of the adoption process.

POTENTIAL IMPACTS OR BENEFIT TO THE COMMUNITY:

The amended budget provides for the delivery of services and construction of capital projects throughout the community.

ALTERNATIVES:

Not approving the attached supplemental budget could result in overspending current budget appropriations. The City is required to disclose all excess of expenditures over appropriations in the Comprehensive Annual Financial report.

CITY MANAGER COMMENT:

N/A

ATTACHMENTS:

1. Supplemental Budget Adjustments
2. Resolution No. 2821
 - A. Need, Purpose And Amount: Detail By Fund & Category

City

Attachment #1-Supplemental Budget Adjustments

Budget Requests - Non-Capital Project Related

COVID 19 Response Related Expenses			
COVID 19 Response	\$	200,000	Funded by General Fund Hotel/Motel Tax
		(27,177)	SAIF Grant Proceeds
		(15,000)	Admin
		(15,000)	Finanace
		(15,000)	IT
		(10,000)	Human Resources
		(10,000)	Police
		(4,000)	Municipal Court
		(15,000)	Parks Administration
		(15,000)	Library
		(2,323)	CD Administration
		(2,500)	Building
		(6,500)	Water Operating
		(6,500)	Sewer Operating
		(6,000)	Storm Operating
		(50,000)	Transit
Water Operating Debt Service			
Debt Service		725,000	Water Operating

Budget Requests - Capital Project Related

4146-Tooze Rd-110th to Grahams Ferry Rd	12,200	Streets SDC Fund
1998-5 Year and Annual Water CIP Budget Development	3,000	Water Operating and Water SDC Funds
1999-Project Design and Development	(3,000)	Water Operating and Water SDC Funds
4199-Exit 283 Congestion Improvements	15,000	Road Operating and Roads SDC Funds
7053-Willamette River Outfalls	20,000	Stormwater Operating and Stormwater SDC Funds
7060-Coffee Creek & Commerece Circle Stormwater Facility	(20,000)	Stormwater Operating and Stormwater SDC Funds
9998-5 Year and Annual Parks CIP Budget Development	1,000	General Fund and Parks SDC
9993-Early Planning - Future Parks Project	(1,000)	General Fund and Parks SDC

RESOLUTION NO. 2821

A RESOLUTION AUTHORIZING A SUPPLEMENTAL BUDGET ADJUSTMENT FOR FISCAL YEAR 2019-20.

WHEREAS, the City adopted a budget and appropriated funds for fiscal year 2019-20 by Resolution No. 2750; and,

WHEREAS, certain expenditures are expected to exceed the original adopted budget in some of the City's funds and budgetary transfers are necessary within these funds to provide adequate appropriation levels to expend the unforeseen costs; and,

WHEREAS, ORS 294.463 provides that a city may adjust appropriations within appropriation categories provided the enabling resolution states the need for the adjustment, purpose of the expenditure and corresponding amount of appropriation; and,

WHEREAS, all transfers from contingencies within the fiscal year to date that exceed fifteen percent (15%) of the fund's total appropriations, are included in the supplemental budget adjustment request; and,

WHEREAS, all expenditure transfers within the fiscal year to date in aggregate exceed ten percent (10%) of the fund's total expenditures, are included in the supplemental budget adjustment request; and,

WHEREAS, consistent with local budget law and based upon the foregoing, the staff report in this matter and public hearing input, the public interest is served in the proposed supplemental budget adjustment,

WHEREAS, to facilitate clarification of the adjustments in this resolution, Attachment A to this resolution provides a summary by fund of the appropriation categories affected by the proposed transfer of budget appropriation and the purpose of the expenditure.

NOW, THEREFORE, THE CITY OF WILSONVILLE RESOLVES AS FOLLOWS:

The City amends and adjusts the estimated revenues and appropriations within the funds and categories delineated and set forth in Attachment A, attached hereto and incorporated by reference herein as if fully set forth.

This resolution becomes effective upon adoption.

ADOPTED by the City Council of the City of Wilsonville at a regular meeting thereof this 15th day of June and filed with Wilsonville City Recorder this same date.

Tim Knapp, Mayor

ATTEST:

Kimberly Veliz, City Recorder

SUMMARY OF VOTES:

Mayor Knapp
Councilor President Akervall
Councilor Lehan
Councilor West
Councilor Linville

Attachment:

A. Need, Purpose And Amount: Detail By Fund & Category

ATTACHMENT A

NEED, PURPOSE AND AMOUNT: DETAIL BY FUND & CATEGORY

	Current Appropriations	Change in Appropriations	Amended Appropriations
General Fund			
Resources			
Interfund Transfers	\$ (3,817,812)	\$ (73,823)	\$ (3,891,635)
Other Revenue	\$ (9,569,070)	\$ (27,177)	\$ (9,596,247)
All other resources	(32,229,090)	-	(32,229,090)
total increase in resources	(45,615,972)	(101,000)	(45,716,972)
Requirements			
Administration	\$ 2,131,424	\$ (15,000)	\$ 2,116,424
Finance	3,362,181	(15,000)	3,347,181
Information systems/GIS	1,279,490	(15,000)	1,264,490
Human Resources	880,052	(10,000)	870,052
Public Works Administrations	727,304	200,000	927,304
Parks & Recreation General Services	1,713,320	(15,000)	1,698,320
Library	2,199,781	(15,000)	2,184,781
Municipal Court	233,535	(4,000)	229,535
Police	5,291,589	(10,000)	5,281,589
All other requirements	27,797,296	-	27,797,296
Net change in requirements	\$ 45,615,972	\$ 101,000	\$ 45,716,972
<p>The primary budget request is directly related to the City's COVID 19 response and the expenses incurred. The Interfund Transfers In represents the amount due from other operating funds for their share of the expenses. The Other Revenue line item reflects a grant received to help defer the costs incurred. The reduction in operating programs reflect the reductions in budget to fund the additional costs incurred. All costs incurred have been reported in the Public Works Administration operating budget, which is responsible for Emergency Operations Management expenses. A net zero transfer will reflect the increase/decrease of funding for the 5 Year and Annual CIP Budget Development and the Parks CIP Closeout from Prior Year capital projects.</p>			
Building Fund			
Interfund transfers	\$ 936,604	\$ 2,500	\$ 939,104
Contingency	1,276,358	(2,500)	1,273,858
All other requirements	1,030,509	-	1,030,509
Net change in requirements	\$ 3,243,471	\$ -	\$ 3,243,471
Increases to the Interfund Transfers reflects the program share of COVID-19 responses expenses.			
Community Development Fund			
Interfund transfers	\$ (3,201,704)	\$ (1,200)	\$ (3,202,904)
Charges for services	(55,165)	(1,800)	(56,965)
All other resources	(4,306,280)	-	(4,306,280)
total increase in resources	(7,563,149)	(3,000)	(7,566,149)
Interfund transfers	\$ 581,628	\$ 2,323	\$ 583,951
Contingency	1,743,723	677	1,744,400
All other requirements	5,237,798	-	5,237,798
Net change in requirements	\$ 7,563,149	\$ 3,000	\$ 7,566,149
Interfund transfers revenue increase reflects additional resources for project management fees on capital improvement projects. Increases to the Interfund Transfers reflects the program share of COVID-19 responses expenses.			
Road Operating Fund			
Interfund transfers	\$ 1,537,030	\$ 14,454	\$ 1,551,484
Contingency	729,414	(14,454)	714,960
All other requirements	1,222,621	-	1,222,621
Net change in requirements	\$ 3,489,065	\$ -	\$ 3,489,065
Interfund transfer requirements reflect funding of the following capital improvement projects: Tooze Rd and Exit 283 Congestion Improvements.			

ATTACHMENT A

NEED, PURPOSE AND AMOUNT: DETAIL BY FUND & CATEGORY

	Current Appropriations	Change in Appropriations	Amended Appropriations
Transit Fund			
Interfund transfers	\$ 637,912	\$ 50,000	\$ 687,912
Contingency	2,062,580	(50,000)	2,012,580
All other requirements	10,786,965	-	10,786,965
Net change in requirements	\$ 13,487,457	\$ -	\$ 13,487,457
Increases to the Interfund Transfers reflects the program share of COVID-19 responses expenses.			
Water Operating Fund			
Interfund Transfers	\$ 4,344,613	\$ 6,500	\$ 4,351,113
Debt Service	1,870,000	725,000	2,595,000
Contingency	13,086,170	(731,500)	12,354,670
All other requirements	6,565,272	-	6,565,272
Net change in requirements	\$ 25,866,055	\$ -	\$ 25,866,055
Increases to the Interfund Transfers reflects the program share of COVID-19 responses expenses. An increase in Debt Service recognizes the defeasance of long term debt. A net zero transfer will reflect the increase/decrease of funding for the requirements reflect funding for the following capital improvement projects: 5 Year and Annual CIP Budget Design and Development and Annual Project Design and Development.			
Sewer Operating Fund			
Interfund Transfers	\$ 4,162,436	\$ 6,500	\$ 4,168,936
Contingency	12,422,123	(6,500)	12,415,623
All other requirements	7,778,485	-	7,778,485
Net change in requirements	\$ 24,363,044	\$ -	\$ 24,363,044
Increases to the Interfund Transfers reflects the program share of COVID-19 responses expenses.			
Stormwater Operating Fund			
Interfund transfers	\$ 4,040,765	\$ 6,000	\$ 4,046,765
Contingency	268,813	(6,000)	262,813
All other requirements	1,602,333	-	1,602,333
Net change in requirements	\$ 5,911,911	\$ -	\$ 5,911,911
Increases to the Interfund Transfers reflects the program share of COVID-19 responses expenses. A net zero transfer will reflect the increase/decrease of funding for the requirements reflect funding for the Willamette River Outfall and Coffee Creek/Commerce Circle Stormwater facility CIP projects.			
Water Capital Projects Fund			
Interfund transfers	\$ (1,900,519)	\$ -	\$ (1,181,792)
All other resources	(6,992,198)	-	(66,121)
Total increase in resources	\$ (8,892,717)	\$ -	\$ (1,247,913)
Water capital projects	7,193,213	-	7,193,213
Interfund Transfers	89,516	-	89,516
Contingency	804,338	-	804,338
Net change in requirements	\$ 8,087,067	\$ -	\$ 8,087,067
A net zero transfer will reflect the increase/decrease of funding for the requirements reflect funding for the following capital improvement projects: 5 Year and Annual CIP Budget Design and Development and Annual Project Design and Development.			
Streets Capital Projects Fund			
Interfund transfers	\$ (12,977,648)	\$ (27,200)	\$ (5,539,405)
All other resources	(1,567,612)	-	(1,266,459)
Total increase in resources	\$ (14,545,260)	\$ (27,200)	\$ (6,805,864)
Streets capital projects	12,563,557	26,000	12,589,557
Interfund Transfers	847,193	1,200	848,393
Contingency	1,134,510	-	1,134,510
Net change in requirements	\$ 14,545,260	\$ 27,200	\$ 14,572,460
The interfund transfers and the corresponding requirements for street capital projects and transfers to other funds is for the following projects: Tooze Road and and Exit 283 Congestion Improvements.			

ATTACHMENT A NEED, PURPOSE AND AMOUNT: DETAIL BY FUND & CATEGORY

	Current Appropriations	Change in Appropriations	Amended Appropriations
Stormwater Capital Projects Fund			
Interfund transfers	\$ (4,521,532)	\$ -	\$ (5,539,405)
Beginning fund balance	(224,605)	-	(224,605)
All other resources	(6,018)	-	(1,266,459)
Total increase in resources	\$ (4,752,155)	\$ -	\$ (7,030,469)
Stormwater capital projects	\$ 4,025,576	\$ -	\$ 4,025,576
Interfund Transfers	449,847	-	449,847
Contingency	276,732	-	276,732
Net change in requirements	\$ 4,752,155	\$ -	\$ 4,752,155
A net zero transfer will reflect the increase/decrease of funding for the requirements reflect funding for the following capital improvement projects: Willamette River Outfalls and Coffee Creek and Commerce Circle Stormwater Facility.			
Parks Capital Projects Fund			
Interfund transfers	\$ (5,381,124)	\$ -	\$ (4,033,579)
All other resources	(202,005)	-	(16,578)
Total increase in resources	\$ (5,583,129)	\$ -	\$ (4,050,157)
Parks capital projects	\$ 4,869,760	\$ -	\$ 4,869,760
Interfund Transfers	463,176	-	463,176
Contingency	250,193	-	250,193
Net change in requirements	\$ 5,583,129	\$ -	\$ 5,583,129
A net zero transfer will reflect the increase/decrease of funding for the requirements reflect funding for the following capital improvement projects: 5 Year and Annual CIP Budget Development and Early Planning - Future Parks Projects.			
Roads SDC Fund			
Interfund Transfers	\$ 38,829	\$ 12,746	\$ 51,575
Contingency	5,939,892	(12,746)	5,927,146
Materials and Services	1,777,519	-	1,777,519
Net change in requirements	\$ 7,756,240	\$ -	\$ 7,756,240
The transfer to other funds is for the following projects: Tooze Rd and Exit 283 Congestion Improvement projects.			
Stormwater SDC			
Interfund Transfers	\$ 6,207	\$ -	\$ 6,207
Contingency	1,348,284	-	1,348,284
Materials and Services	2,153,301	-	2,153,301
Net change in requirements	\$ 3,507,792	\$ -	\$ 3,507,792
A net zero transfer will reflect the increase/decrease of funding for the requirements reflect funding for the following capital improvements projects: Willamette River Outfalls and Coffee Creek & Commerce Circle Stormwater Facility.			
Parks SDC Fund			
Interfund Transfers	\$ 16,546	\$ -	\$ 16,546
Contingency	4,657,113	-	4,657,113
Materials and Services	1,061,500	-	1,061,500
Net change in requirements	\$ 5,735,159	\$ -	\$ 5,735,159
A net zero transfer will reflect the increase/decrease of funding for the requirements reflect funding for the following capital improvements projects: 5 Year and Annual CIP Budget Development and Early Planning - Future Parks Projects.			



MAY 2020 MONTHLY REPORT

From The Director's Office

Housing issues are continually on the mind and firmly in the work program of Community Development Department staff. This month, staff will release the 2019 Annual Housing Report, which is an illustrative, interactive story map overview of housing activities and trends. The report contains charts, maps and summaries of our housing inventory, the amount and type of homes constructed throughout the community as well as the number of homes approved for future development, affordability and growth trends. Council will receive a presentation on the Annual Report at an upcoming work session. I am hopeful that you will find this an interesting and valuable tool.

Last month, the Planning Commission conducted a public hearing on the Equitable Housing Strategic Plan, forwarding it unanimously to the Council. The goal of this Plan is to identify market gaps and prioritize strategies to fill the gaps providing citizens with housing opportunities for different household compositions, ages and incomes. The Plan was guided by a Council goal that led to the creation of seven policy objectives to guide development of recommended strategic actions included within the Plan. This important work is scheduled to be on the Council docket in June.

Additionally, staff have been busy advancing many housing related items, participating in and tracking committee rulemaking and model code work at the state level on House Bill 2001 and House Bill 2003. Work on infrastructure based time extension requests is also ongoing with much focus on writing grants to assist in implementing the Council work program. Staff recently submitted grant requests upwards of \$500,000 for master planning Frog Pond East and South, in addition to addressing the legislative mandates related to missing middle housing products. Staff are optimistic at our chances of receiving substantial resources from outside agencies to complete this important housing work.

Respectfully submitted,

Chris Neamtzu, AICP
Community Development Director



Building Division

Building Safety Month 2020

As you may know, building codes and inspections help protect communities from a variety of disasters, such as fires, weather-related events, and structural problems. To celebrate all that building codes and inspections do to keep our community safe, Mayor Tim Knapp proclaimed May 2020 as Building Safety Month.

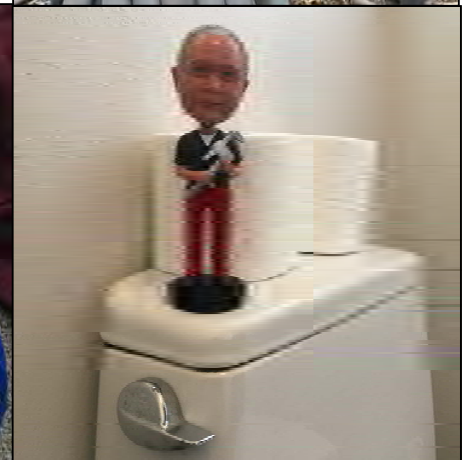
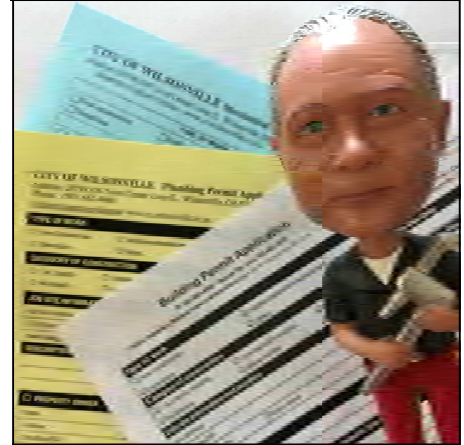
For the past several years, the Building Division has partnered with the team at the Library to host a build event on the Library patio prior to Storytime. This event has become a highlight of the year for both staff and community members—especially our youngest community members. In light of current circumstances, however, we made the difficult decision not to hold this annual event during Building Safety Month in May.

However, our Building staff still wanted to be able to engage with community members throughout the month and to draw attention to topics such as disaster preparedness, water safety, sustainability, and career opportunities in the field. Building Inspector and Plans Examiner Mike Ditty stepped up to the plate, offering use of his lookalike bobblehead as a fun outreach tool. Meet “Inspector Bitty,” our bite-sized partner in safety!

Throughout the month of May, Inspector Bitty has been making appearances on the City’s social media pages and on our virtual City Hall, [Let’s Talk, Wilsonville!](#), to offer helpful safety tips and fun facts on building-related topics. Building codes are often seen as a serious topic (and they are!), but doesn’t mean they can’t be fun or interesting—at least that’s how we see it here in the Building Division!

Are you planning an upcoming building project? Please don’t hesitate to reach out to our Building team with any questions you might have. We want your project to succeed from the beginning, and are all happy to help answer your questions.

—Laura Ruggles, Permit Technician



Economic Development Division

COVID-19 Economic Response

- COVID-19 Relief Grants Program
 - On May 4, City Council approved \$400,000 in grant awards to 125 Wilsonville businesses.
 - The Wilsonville Small Business COVID-19 Relief Grants Program was publicized via news releases, social media channels, emails, phone calls to nearly 700 businesses, and a postcard mailing to all residents and businesses with Wilsonville mailing addresses.
 - Council amended the program to award an additional \$1,500 to 38 qualifying businesses in the tourism/hospitality sector funded by City Transient Lodging Tax (TLT) revenues.
 - Grant checks were administered and cut to all recipients on May 7, just three days after the final award decision.
 - Example of how the grant money will be used include:
 - Vanguard Brewing is using a portion of their \$5,500 relief grant to fund a community soup initiative called Soup On Us that offers free soup on Tuesday-Saturday to community members in need.
 - Concert School of Music used their \$4,000 relief grant to help keep its 15 employees on the payroll and fund laptops and accessories to improve the school's virtual teaching capacity.
 - Final COVID-19 relief grant allocations:

	Grant Amount	Estimated	Actual	Estimated	Actual
Home-Based Businesses	\$1,000 / \$2,500	28	21	\$28,000	\$25,500
Microbusinesses	\$2,000 / \$3,500	85	56	\$170,000	\$134,500
Small Business	\$4,000 / \$5,500	43	45	\$172,000	\$210,000
Clackamas County Hotels	\$10,000	3	3	\$30,000	\$30,000
Total		159	125	\$400,000	\$400,000

- Oregon Reopening
 - Communications sent to 800 businesses on May 13 with information on Oregon Reopening guidelines. City resource page here: ci.wilsonville.or.us/reopen.
 - Reopening Webinar Series was offered to local Wilsonville businesses featuring Washington County public health experts, City of Wilsonville staff, Chamber of Commerce staff, and staff from the Office of Governor Kate Brown. Webinar topics included advising for the restaurant, retail, personal services, and professional services sectors. City of Wilsonville and Chamber of Commerce staff also offered a webinar called "Roadmap to Reopening and Recovery" featuring the Clackamas County SBDC and the Governor's Regional Solutions.
 - City acquiring and distributing PPE (face masks and gloves) to Wilsonville small/public facing businesses with under 20 full-time employees. This could impact 100+ businesses.

Recruitment

- Product packaging manufacturer for food/medical/retail industries is looking for a 50,000+ square foot industrial facility. Project would create 33 jobs. Staff submitted a proposal on May 14 for property in Wilsonville.
- Minnesota-based industrial developer is seeking to acquire 45 acres in the Coffee Creek Industrial Area for a speculative 300,000-600,000 square foot distribution center development. Property acquisition efforts are underway.

Engineering Division, Capital Projects

5th Street/Kinsman Road Extension (1139/2099/4196)

This project involves the design and construction of the extension of 5th Street and Kinsman Road between Boones Ferry Road and Wilsonville Road, including water, sewer, storm, franchise utility extension, and installation of a portion of the Ice Age Tonquin Trail. Land acquisition is underway. Construction is planned to start in the first quarter of 2021.

Boeckman Dip Bridge (4205/4206/4212)

Culvert inspection of the two culverts crossing under Boeckman Road at Boeckman Creek is nearly complete.

Elligsen Well Upgrade and Maintenance (1128)

This project involves correcting well casing and water chemistry deficiencies in the existing Elligsen well to maintain it as a backup supply for emergencies. Well column and casing inspections, water chemistry analysis, and recommendations for improvements to address any discovered deficiencies occurred in May. After inspection and analysis is complete, redevelopment of well capacity and other recommended improvements will occur.

French Prairie Bridge (9137)

This project will determine the final location, alignment, and design type and includes preparation of preliminary construction and environmental documents for a new pedestrian, bike, and emergency vehicle bridge over the Willamette River in the vicinity of Boones Ferry Road. City staff are coordinating with Clackamas County to schedule a resolution supporting the Task Force recommendation of the suspension bridge as the preferred bridge before the Clackamas Board of County Commissioners.

French Prairie Road Phase II (2500/4500/7500)

This project will include paving, storm sewer, and sanitary sewer improvements to French Prairie Road in the Charbonneau development. The contract was awarded to K&E Excavating. Construction is anticipated to begin in June and to be completed by the end of 2020.

Garden Acres Road (4201)

This project involves the design and construction of Garden Acres Road from a rural local access road to an urban industrial roadway as part of the Coffee Creek Industrial Area plan and includes Willamette Water Supply Program segment PLM_1.2 of the 66" water transmission pipe. Construction of a new storm drainage pipe to serve the future Coffee Creek Industrial Area is complete. Installation of City water system improvements is underway. Construction of the WWSP 66" raw water pipeline is expected to begin in mid-June, and completion is anticipated for January 2021.



Culvert at Boeckman Dip Bridge



Elligsen Well

Engineering Division, Capital Projects

Gesellschaft Well Facility Rehab and Upgrade (1083)

This project addresses upgrades and repairs needed to correct deficiencies in the Gesellschaft well house, including piping, electrical, and mechanical systems. Work is nearing completion, with instrumentation, control programming, and startup operations occurred in May with final completion in June.

I-5 Pedestrian Bridge (4202)

This project involves the design and preparation of construction documents for a pedestrian and bicycle bridge over Interstate 5 from Town Center Loop West to Boones Ferry/Barber Street. The design team is currently preparing bridge and plaza design concepts based on results of the public engagement and feedback received from the Planning Commission and City Council. Draft plaza layouts will be presented before Planning Commission for feedback at their June meeting. The bridge and plaza conceptual designs will be available for public feedback in August.

Memorial Drive Splitter Manhole Replacement (2085)

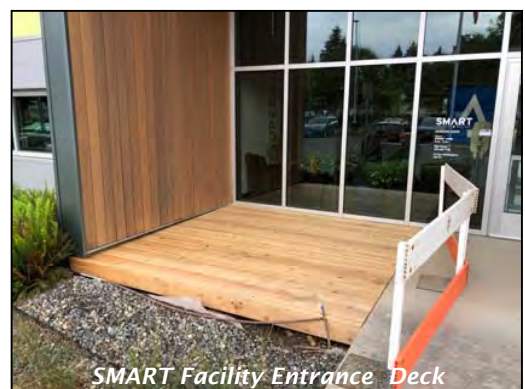
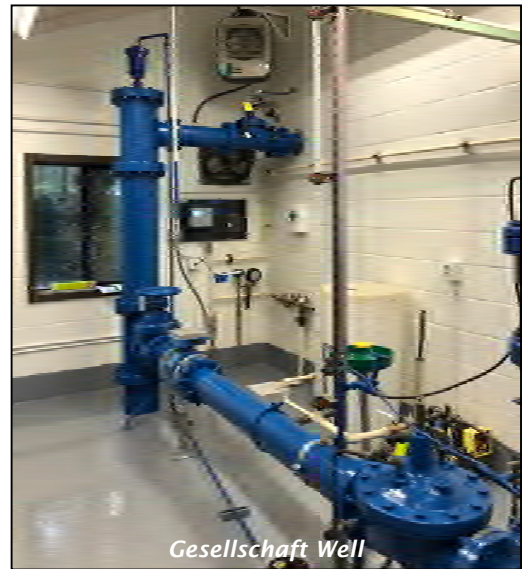
This project involves the replacement of an existing sanitary sewer manhole at the intersection of Parkway Avenue and Memorial Drive with a new flow diversion manhole. The purpose of the project is to maintain equalized flows between two parallel sewer lines under I-5 and to avoid potential overflows. Multiple utility conflicts discovered in September 2019 caused a project delay of six months. Now that all the utility conflicts have been removed or relocated, work can now continue and will be completed before July 2020.

Memorial Park Pump Station (2065)

This project involves replacing and relocating the wastewater pump station in Memorial Park. The contract was awarded to McClure and Sons. Construction is anticipated to begin in June with completion in March 2021.

SMART Parking Lot Improvements (8135)

This project involves the expansion of the existing employee and visitor parking lot at the SMART Administrative/Fleet Facility by adding ten parking stalls, a new curb and sidewalk, and a new cedar deck at the facility entrance. A large portion of the project's cost will be covered by a Federal Transit Administration grant received by the City in 2017. The City's contractor mobilized to the site in late March to begin excavation of the new parking area. Paving of the new parking area was completed in late April. Sealing and striping work occurred in May. Work is anticipated to be completed by the end of June.



Engineering Division, Capital Projects

Street Maintenance Project (4014/4118/4725)

The design team is working on finishing up the plans for street maintenance on Day Road, Elligsen Road, Parkway Avenue, and Main Street. The construction project was advertised on May 27 and we anticipate bringing a construction contract to Council on July 6.

WTP Expansion to 20 MGD (1144)

This project will expand the Water Treatment Plant (WTP) capacity to 20 MGD and incorporate related WTP capital improvements, including Life Safety Upgrades (1137), Seismic Retrofits (1145), and Repair and Replacement (1146) projects. A CMGC alternative contracting method was approved by City Council. A Request for Proposals for engineering services was issued in April, and a consultant was selected. An engineering contract award is anticipated in June.

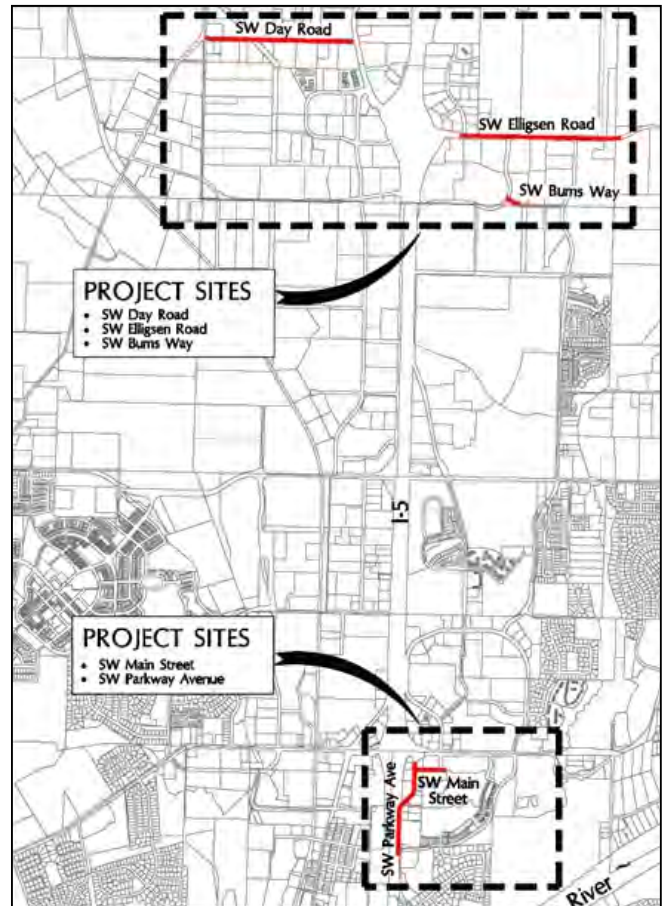
WWSP Coordination (1127)

Ongoing coordination efforts continue with the Willamette Water Supply Program. Here are the updates on major elements within Wilsonville:

- **PLM 1.1** This is the WWSP 66" raw water pipeline between Arrowhead Creek Lane and Wilsonville Road. Construction of the pipeline is underway. Pipe installation along Kinsman Road south of Wilsonville Road is complete. Completion of this segment of pipeline is expected in Fall 2020.
- **PLM 1.2** This is the WWSP 66" raw water pipeline that is included as part of the Garden Acres Road (4201) project. Construction of the WWSP pipeline is anticipated to start in June 2020.
- **PLM 1.3** This is the remainder of the WWSP 66" raw water pipeline through Wilsonville, including Kinsman Road, Boeckman Road, 95th Avenue, and Ridder Road. WWSP is progressing toward 60% design plans. Construction is scheduled to begin in Fall 2020.
- **Raw Water Facility Improvements** This capital improvement project is under the management of the Willamette Water Supply Commission and the Tualatin Valley Water District. Improvements include seismic upgrades to the existing intake facility and river embankment, as well as the installation of a 66" raw water pipe and an 8" domestic City water pipe. The project is currently under plan review. Construction is anticipated to begin in June 2020.

WWTP Master Plan (2104)

This project will evaluate capacity of Wastewater Treatment Plant (WWTP) processes to accommodate projected growth and regulatory changes. A prioritized capital improvement plan and budget will be developed. The engineering contract was awarded in May, and the project is anticipated to be completed in June 2021.



Engineering Division, Private Development

DP Nicoli

This project is located on Boberg Road, and will include the installation of water service, LIDA facilities, and sidewalk extensions, in addition to the repair of the street and curb section along the property on Boberg Road. The Public Works Permit has been issued and grading has started.



DP Nicoli

Dutch Bros Coffee

A new Dutch Bros Coffee Drive-Thru is proposed on the vacant parcel at the southeast corner between Park Place and Town Center Loop West. As a part of the development, a new Rapid Flash Beacon (RFB) crossing will be installed on Town Center Loop West just south of Park Place. In addition to the RFB, a marked crosswalk will also be installed at the intersection on Park Place. The project is currently under review.



Fir Avenue Commons

Fir Avenue Commons

This is a ten home condominium development nestled in Old Town on Fir Avenue. Nine homes are currently under construction. Franchise utilities are ready for installation. The final street work is awaiting granite curbs that are coming from the East Coast.



Grace Chapel

Frog Pond Meadows

74-lot subdivision located north of Stafford Meadows and adjacent to Stafford Road. The contractor (NEI) is completing final items and will request a punchlist as soon as the design engineer certifies the job.

Frog Pond—Morgan Farm Phase 2

42-lot subdivision located north of Morgan Farm Phase 1. This project is in the final stages. The Engineering Division and the developer are working to address underground water intrusion at one of the stormwater swale facilities, as well as ADA slope requirements. The project is currently in the maintenance phase except for the sidewalks.



Hilton Garden Inn

Grace Chapel

Project involves the remodel and expansion of the south building of the former Pioneer Pacific College, along with the rerouting of a major storm drain line. The contractor has installed the public storm piping and is currently preparing the site for the building expansion. The new driveways and a new sanitary connection are not yet complete.

Hilton Garden Inn

Construction continues on this four-story hotel at Memorial Drive and Parkway Avenue. The Engineering Division recently approved a tap for a new irrigation meter. Asphalt road repair, grass seeding, and final punch list remain before this project goes into the maintenance phase.

Engineering Division, Private Development

Northstar Contractor Establishment—Clay Street

The Public Works Permit was issued for this half street improvement project that will add sidewalks and street side swales on our border with Washington County near Coffee Creek Correctional Facility. The Public Works Permit was issued. Construction is anticipated to start soon.

Shredding Systems

This project involves adding an additional building and expanding the sanitary, water, and storm systems. A sidewalk will also be added on 95th Avenue. The project is currently under plan review.

Siena at Villebois Fire Reconstruction

Taylor Morrison (formerly Polygon Homes) has hired NEI to begin the repair of the street, curb, gutter, and LIDA facilities along Campanile Lane, Valencia Lane, and Collina Lane. This work is expected to last two to three weeks.



Engineering Division, Natural Resources

Stormwater System Annual Inspection and Maintenance Report

The City has stormwater maintenance agreements with property owners for the operation and maintenance of private stormwater systems. By May 1 of each year, an annual inspection and maintenance report is due from the owner or responsible party (e.g., management company, HOA, etc.). In March, City staff mailed letters to property owners or responsible parties, including a report form, reminding them to submit their annual report. The required information includes the inspection date and any maintenance, repair, or replanting activities that were completed. After receiving the reports, City staff conducts an inspection to verify the information in the report.



Planning Division, Current

Administrative Land Use Decisions Issued

- 2-lot partition on Canyon Creek Road South
- Additional sign on porte cochere for new Hilton Garden Inn
- 13 Type A Tree Permits
- 5 Type B Tree Permits
- 1 Type C Tree Permit
- 1 Class I Sign Permit
- 1 Zoning Verification Letter
- 4 residential building permit approvals (decks, outbuildings, additions)

Construction Permit Review, Development Inspections, and Project Management

In May, Planning staff actively worked with developers and contractors to ensure construction of the following projects are consistent with Development Review Board and City Council approvals:

- Aspen Meadows and Aspen Meadows II subdivisions off Canyon Creek Road South
- DP Nicoli Industrial Development on Boberg Road
- Dutch Bros Coffee kiosk in Town Center
- Fir Avenue Commons residential development in Old Town
- Grace Chapel on Parkway Avenue
- Hilton Garden Inn
- I&E Construction headquarters on Parkway Avenue
- Regional Park 7&8 in Villebois
- Residential subdivisions in Frog Pond West

Development Review Board (DRB)

During their May 11 meeting, DRB Panel A held public hearings and unanimously approved two extensions of temporary use permits. The first was a two-year extension for temporary mailboxes and a coffee cart at Piazza Villebois, and the second was a five-year extension for a temporary office building at Republic Services on Ridder Road. The review of the Republic Services application also included a revision to the phasing of future planned expansions. This was DRB Panel A's first virtual meeting using the Zoom video conference platform and it went smoothly.

DRB Panel B did not meet in May.

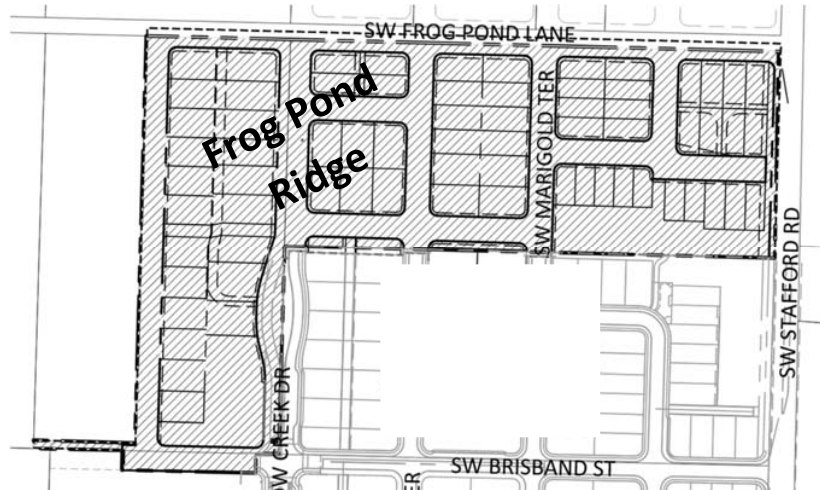


Planning Division, Current

DRB Projects Under Review

During May, Planning staff actively worked on the following major projects in preparation for potential public hearings before the Development Review Board:

- 6-unit residential development in Old Town at the north end of Magnolia Avenue
- 11-lot subdivision at the south end of Canyon Creek Road South
- 69-lot subdivision in Frog Pond proposed by West Hills Development
- Parkway Woods (former Xerox campus) remodel



Planning Division, Long Range

Comment on Industrial Development in Unincorporated Marion County north of Aurora

In May, staff became aware that a long-stagnant application for an airport-related development on Exclusive Farm Use land adjacent to the Aurora Airport was moving forward to a hearing before the Marion County Board of Commissioners on June 3 at 9:30 a.m. Staff had previously offered comment when the proposal was before a hearing's officer. Staff reviewed updated information from the applicant and Marion County staff and prepared comments for participation in the June hearing.

Commercial Recreation in Industrial Zones

Planning staff continued to work on exploring code changes for additional allowance of Commercial Recreation uses in the PDI zones. Following a Council work session in April, the Planning Commission held a work session on May 13. City Council and Planning Commission have provided staff the necessary direction and input to allow staff to draft code updates to bring back to the Planning Commission and City Council at the appropriate time in the future. Initial staff feedback included allowing Commercial Recreation uses up to 10,000-15,000 square feet as a conditional use in multi-tenant industrial development designated as "Employment" on the Metro Title 4 Map. The discussion at City Council and Planning Commission emphasized the importance of preserving industrial land for industrial uses while being flexible where it made sense to allow commercial recreation uses.

Planning Division, Long Range

Equitable Housing Strategic Plan

After nearly a year of stakeholder outreach, market research, and input from a project task force, Planning Commission, and City Council, the project team published the final draft Equitable Housing Strategic Plan in May. The Planning Commission held a public hearing on the Plan on May 13, recommending that City Council approve the Plan. The City Council has a public hearing scheduled for June 15. Upon its adoption, the Plan will provide a framework for actions the City can take with the goal of making housing more affordable and attainable.

General project information is available on the project website: www.ci.wilsonville.or.us/housing.

Frog Pond East and South

The master planning area encompasses the area added to the Urban Growth Boundary by Metro in 2018 (see right). The City is required to adopt a master plan and related policies and codes for the area by the end of 2022. Staff are awaiting word on a grant request to Metro prior to continuing this work.



House Bill 2001 Implementation (Middle Housing)

This project will build upon and help implement the Equitable Housing Strategic Plan while ensuring the City complies with House Bill 2001 regarding the allowance for middle housing, including duplexes, triplexes, quadplexes, row houses, and cottage cluster housing. The project will also help lay the foundation for the upcoming master planning work for Frog Pond East and South. In May, staff reviewed draft rules and model code from the state and provided feedback. Staff also continue to await word on grant requests before moving forward with the project in the coming months.



House Bill 2003 Implementation (Housing Needs Analysis/Housing Production Strategies)

Planning staff continued to coordinate with DLCD staff on the implementation of House Bill 2003 concerning new Housing Needs Analysis (HNA) timelines and the new requirement to produce a periodic Housing Production Strategy. As Housing Production Strategies are a new requirement, to be completed by a City within a year of completing a HNA, a substantial amount of state administrative rulemaking needs to occur to define them. Staff participated in a fourth meeting of the state’s Technical Advisory Committee (TAC) on May 18 for rulemaking on Housing Production Strategies.

Planning Division, Long Range

Planning Commission

On May 13, the Planning Commission held a public hearing on the Equitable Housing Strategic Plan and received an update during their work session on the potential for Commercial Recreation uses in the PDI zones. For the Equitable Housing Strategic Plan, the Commission unanimously recommended approval of the plan to City Council as well as discussed a desire to set up a City committee on equity and inclusion to continue the discussion on equitable housing as well as broader equity issues. Staff will bring back more information on the equity and inclusion committee options for the Commission’s consideration. For Commercial Recreation uses in the PDI zones, the Commission appreciated the additional information from staff and provided staff the direction needed to continue to work on this topic at the appropriate time. This was the Planning Commission’s first virtual meeting using the Zoom video conference platform and it went smoothly.

Residential Code Modernization Project

The Wilsonville Residential Zoning Modernization Project updates City residential zoning standards in the Planned Development Residential (PDR) and (R) zones. The updates address issues raised over the last couple of decades. City Council adopted the ordinance incorporating the updates into the Comprehensive Plan and Development Code on second reading on May 4. The updates will go into effect on June 3.

Wilsonville Town Center Plan



I-5 Pedestrian Bridge

The Town Center project team continued to review design feedback on the I-5 Pedestrian Bridge and Town Center Gateway Plaza project, which will provide an important connection between Town Center and the Wilsonville Transit Center and neighborhoods west of Interstate 5. Throughout May, the project team continued discussion on integrating input gathered during the project kickoff outreach. The team also discussed refinements to the project’s Public Engagement Plan in light of COVID-19 related modifications to the City’s public events schedule.

General project information is available on the project website: www.letstalkwilsonville.com/I5-Ped-Bridge.



Streetscape Plan

The Town Center Plan calls for creating Streetscape Design Standards to tie together the various sub-districts within the Town Center with an attractive design palette. As this project is inherently connected to the construction of the I-5 Pedestrian Bridge project, the I-5 Pedestrian Bridge and Town Center Streetscape plan are moving forward on a similar timeframe. During May, staff sent out a request for qualifications for the project and began reviewing the submitted bids to select a consultant.





MAY
MONTHLY
REPORT

From the Director:

Greetings from the Finance Team!

The month of May was a busy one for Finance team as we prepared for budget meetings and the reentry to City Hall! We also through the kick-off off the HR/Payroll MUNIS implementation into the mix.

The Budget Committee meetings went quite well with great discussions between the staff and the committee. With the Council's adoption on June 1, staff will begin formatting the final budget document. This step includes removing the proposed and percentage columns and adding the approved and adopted columns throughout all of the tables.

The newly implemented paperless Accounts Payable process has been very successful. Margie Trader, our AP technician, spearheaded the transition once more and more staff began working from home. Having gotten the program approved by our auditors before implementation, staff now receives an electronic copy of all invoices for their online approval. Being as staff is now familiar with the process, Shelly Marcotte, our payroll technician, has created a similar process for timesheets!

Hard to believe that we are just weeks away from the end of the fiscal year! It has been quite a year and looking forward to the challenges and rewards of FY2020-21.

Stay Safe!

-Cathy Rodocker

By the Numbers:

Finance Statistics for the period of July 1, 2019-May 31, 2020

Please Note: Utility Billing is reported with a one month lag-the numbers reported reflect the first month of the new fiscal year.

<u>Utility Billing:</u>		<u>Accounts Payable:</u>		<u>Municipal Court:</u>	
Total Monthly Bills	67,420	Invoices Processed	6,756	Total Citations Issued	2,082
New Customers	824	Payments Processed	3,809	Total Suspensions Issued	60
New Service Locations	79			Ticket Revenue	\$242,410

FY20 Financial Update:

Attached please find the financial reports through May 2020. Finance continues to monitor all funds on a regular basis and revenues several days a week.

General Fund: Overall, the general fund revenues are on track, with 92% of total revenues received. At this point in time, I expect that our taxes and intergovernmental revenues should be near the anticipated budget by the end of the fiscal year. This is great news since taxes are the single largest funding source for the General Fund. Hotel/Motel Tax and Court fines are significantly lower than anticipated. At the end of May, the General Fund expenditures are reported at \$26.4M, approximately \$500K less than the year-to-date revenues received.

Building Fund: Overall, revenues are in line with the amount budgeted. As of the end of May, the Fund has used over \$882K of the fund balance to meet the ongoing expenses.

Community Development Fund: Great news for the Community Development fund permit revenues! Last month those revenues increased almost \$200K! While the fund's expenses continue to outpace the revenues, the revenue from May will have a positive impact on the overall fund balance. Through May, the fund has used a little over \$1.0K of their fund balance to meet ongoing expenses.

Road Operating Fund: Due to the timing of receiving the gas tax receipts, the current revenues show a one month lag in the intergovernmental line item. We have received the revenue for the month of May, however, due to budget and Munis implementation, the revenue has not yet been recorded or reflected in this report. The amount received, however, was in line with the amount received last fiscal. Due to the delay in construction of CIP's, we anticipate the expenditures to be less than anticipated.

Transit Fund: With the 3rd quarter tax payments processed, we are on track with our Transit Tax revenues. The \$1.2M grant received will be reflected in the June reports. With several bus purchases put on hold, the Transit fund will end with less than anticipated intergovernmental revenue as well as capital expenses.

Water, Sewer and Stormwater Funds: As discussed during the budget committee meetings, the budget for Water and Sewer revenues were overly optimistic for the fiscal year. We anticipate both funds to Delayed construction on CIPS have reduced anticipated expenditures in all three funds.

	Budget	Activity	% Used
Fund 110 General Fund:			
Taxes	11,655,250	10,868,048	93%
Intergovernmental	2,265,804	2,138,766	94%
Licenses and Permits	177,750	130,499	73%
Charges for Services	747,100	527,434	71%
Fines	320,000	238,793	75%
Investment Revenue	300,900	466,745	155%
Other Revenues	9,569,070	9,541,154	100%
Transfers	3,817,812	3,001,647	79%
Total Revenue	28,853,686	26,913,087	93%
Personal Services	9,289,445	8,120,209	87%
Materials and Services	20,772,072	16,434,828	79%
Capital Outlay	311,604	93,667	30%
Transfers	4,896,602	1,714,812	35%
Total Expense	35,269,723	26,363,516	75%
Fund 210 Fleet Fund:			
Charges for Services	1,373,975	1,259,477	92%
Investment Revenue	23,069	29,096	126%
Other Revenues	0	25,131	-%
Total Revenue	1,397,044	1,313,705	94%
Personal Services	781,630	708,989	91%
Materials and Services	800,055	675,336	84%
Capital Outlay	149,000	70,278	47%
Transfers	2,400	2,200	92%
Total Expense	1,733,085	1,456,803	84%
Fund 230 Building Fund:			
Licenses and Permits	548,000	566,474	103%
Licenses and Permits-Villebois	254,000	104,008	41%
Charges for Services	9,000	6,750	75%
Investment Revenue	70,210	85,467	122%
Transfers	41,986	34,992	83%
Total Revenue	923,196	797,691	86%
Personal Services	1,056,480	908,730	86%
Materials and Services	385,469	308,032	80%
Transfers	936,604	463,139	49%
Total Expense	2,378,553	1,679,901	71%
Fund 235 Community Development Fund:			
Intergovernmental	0	49,500	-%
Licenses and Permits	352,440	747,375	212%
Licenses and Permits-Villebois	203,305	39,799	20%
Charges for Services	1,076,328	483,146	45%
Investment Revenue	55,165	80,520	146%
Other Revenues	400	16,482	4,121%
Transfers	3,201,704	1,531,572	48%
Total Revenue	4,889,342	2,948,394	60%
Personal Services	3,273,480	2,503,449	76%
Materials and Services	1,183,618	937,830	79%
Capital Outlay	0	2,015	-%
Transfers	581,628	529,121	91%
Total Expense	5,038,726	3,972,416	79%
Fund 240 Road Operating Fund:			
Intergovernmental	1,800,100	1,504,436	84%
Investment Revenue	25,075	50,589	202%
Other Revenues	2,000	57,769	2,888%
Total Revenue	1,827,175	1,612,794	88%
Personal Services	373,970	320,919	86%
Materials and Services	586,851	399,074	68%
Debt Service	82,000	81,446	99%
Transfers	1,537,030	663,073	43%
Total Expense	2,579,851	1,464,511	57%

	Budget	Activity	% Used
Fund 245 Road Maintenance Fund:			
Charges for Services	1,899,000	1,817,746	96%
Investment Revenue	60,180	76,035	126%
Total Revenue	1,959,180	1,893,780	97%
Transfers	4,113,962	2,535,994	62%
Total Expense	4,113,962	2,535,994	62%
Fund 260 Transit Fund:			
Taxes	5,151,000	4,720,691	92%
Intergovernmental	4,217,893	1,851,690	44%
Charges for Services	185,000	141,085	76%
Investment Revenue	55,150	102,096	185%
Other Revenues	14,000	11,087	79%
Total Revenue	9,623,043	6,826,650	71%
Personal Services	4,146,860	3,429,623	83%
Materials and Services	2,902,150	2,230,496	77%
Capital Outlay	2,451,655	56,475	2%
Transfers	637,912	524,620	82%
Total Expense	10,138,577	6,241,213	62%
Fund 310 Water Operating Fund:			
Intergovernmental	0	50,000	-%
Charges for Services	9,217,000	8,250,132	90%
Fines	19,000	11,693	62%
Investment Revenue	270,810	372,877	138%
Other Revenues	195,550	211,053	108%
Total Revenue	9,702,360	8,895,756	92%
Personal Services	629,168	482,932	77%
Materials and Services	4,295,104	3,028,411	71%
Capital Outlay	679,000	68,655	10%
Debt Service	1,870,000	2,586,020	138%
Transfers	4,344,613	1,141,385	26%
Total Expense	11,817,885	7,307,404	62%
Fund 320 Sewer Operating Fund:			
Charges for Services	8,239,145	7,340,689	89%
Fines	0	64,722	-%
Investment Revenue	270,810	368,827	136%
Other Revenues	18,000	25,316	141%
Transfers	600,000	600,000	100%
Total Revenue	9,127,955	8,399,554	92%
Personal Services	402,546	292,225	73%
Materials and Services	3,574,439	2,715,777	76%
Capital Outlay	24,000	28,173	117%
Debt Service	3,000,000	2,943,263	98%
Transfers	4,162,436	600,640	14%
Total Expense	11,163,421	6,580,078	59%
Fund 350 Street Lighting Fund:			
Charges for Services	545,500	481,437	88%
Investment Revenue	25,075	31,668	126%
Total Revenue	570,575	513,105	90%
Materials and Services	373,843	287,408	77%
Transfers	430,103	43,591	10%
Total Expense	803,946	331,000	41%
Fund 370 Storm Water Operating Fund:			
Charges for Services	3,175,000	2,901,429	91%
Investment Revenue	50,150	53,987	108%
Total Revenue	3,225,150	2,955,416	92%
Personal Services	274,796	211,396	77%
Materials and Services	659,037	409,167	62%
Debt Service	508,000	507,827	100%
Transfers	4,040,765	1,465,498	36%
Total Expense	5,482,598	2,593,888	47%



MAY 2020 MONTHLY REPORT

From the Director

In May, we continued with projects we started in April, as well as prepared for upcoming services and programs.

Library staff continued inventorying and weeding the library's print and AV collections. The largest collections have completed their inventory, and have been 90% weeded of poor condition, outdated, and unused items. New subject-based non-fiction interest areas are being developed, including travel, biographies, and self-help.

Virtual services expanded to include CreativeBug, an online resource with arts and crafts classes and workshops. For programs, we added a Spanish stories for children and brought back the English Conversation Group, now meeting on Zoom.

Major efforts went into preparing for re-entry. Staff created plans for increasing patron and staff safety once the building is open, and prioritized services to provide in an incremental manner.

In-person library services resumed with curbside holds pickup for patrons with library items already waiting for them. We also resumed our 'pick lists,' pulling items off our shelves that our citizens requested.

The Summer Reading Program (SRP) had to change to adapt to the current situation, so staff developed revised structures for the SRP. One new aspect is an online component we have been wanting to add for awhile now. We are partnering with Beanstack, which provides a website and app for SRP participants to track their reading. To promote the SRP, Youth Services staff created a fun video skit and sent it to local schools to share with their students.

Also in May in coordination with City of Wilsonville staff, the library hosted a Red Cross blood drive for all City employees. Thirty-one staff donated enough blood to save seventy-eight lives.

In other news, Outreach Librarian Deborah Gitlitz was elected to be on the American Library Association's Caldecott Committee for 2022. This national committee selects the most distinguished American picture book for children from books published in the preceding year. It is quite an honor, and we are proud of Deborah!

-Pat Duke, Library Director



MAY 2020 Monthly Report

From the Directors Desk:

The City of Wilsonville Parks and Recreation Team continues to work through challenging times with creativity, enthusiasm and hard work. Over these past few weeks, amenities such as our Dog Park, Skate Park, Pickleball and Tennis Courts have opened for public use. The maximum capacity at all sites is 25, with all social distancing rules still in place. Parks never closed during the Covid-19 period and everyone is welcome to enjoy the serenity a park settings creates. Re-entry to the Parks and Recreation administration building will start at 8AM, Monday June 8. The Community Center will open their doors at a later date to be announced.

Speaking of the Community Center, our Nutritionists, Janice and Catherine, continue to cook over 500 meals per week and with the help of Administrative Assistants Brenda & Brittany, numerous volunteers, and drivers from SMART Transit, these meals are packaged and distributed throughout the City. The Home Delivered meals program is practically flawless under the guidance of Program Manager, Brain Stevenson. Information and Referral Specialist, Sadie, is still available via phone for any assistance the senior population may need.

Ahsamon and Brad continue providing recorded classes (some you can stream live) including Meditation, Yoga and exercise classes. These classes can be found on the City's YouTube page. Recreation Coordinator, Erica has been working with Summer Camp providers to schedule camps beginning in July that will adhere to Oregon Health Authority Guidelines.

The Parks Crew continues to provide amazing, clean and safe parks and still find time to handle various projects to improve our City. The most recent project was obtaining rubberized material, made from recycled concrete, to provide a more "dust free" permanent parking lot at the River Shelter in Memorial Park. Please get out to the parks, but please Play Safe.

-Mike McCarty

May 2020

Memorial Day Ceremony

Program Manager, Brian Stevenson, prepared for and attended a Memorial Day Celebration with representatives from the Korean War Veterans' Association Oregon Trail Chapter, the Korean War Memorial Foundation of Oregon (KWMFO), and the American Legion Post 65. Those in attendance gathered for prayers, remarks and the presentation of wreaths in honor of those who died in the Korean War. At the end of the ceremony



TAPS was played and nine planes from the West Coast Ravens Precision Flight Squadron flew over the Memorial.

PPE Distribution

The Parks and Rec Admin building served as the pick-up location for several Wilsonville based businesses to get PPE on Friday, May 29. This project was a collaborative effort with the Community Development department. Several Parks and Rec Staff, along with Jordan Vance from Community Development, helped distribute the PPE in a social distance fashion.



The Park Classroom

A new video series titled, "The Park Classroom" kicked off this month. Each video is meant to introduce a new topic in nature. Episode 1 featured a banana slug, and the most recent episode teaches viewers how to identify various parts of a flower, and how to tell the difference between an Azalea and a Rhododendron.



Park Amenities Begin to Re-Open

Memorial Park saw the re-opening of several amenities this month, including tennis courts, pickleball courts, the dog park, and the skate park. Signage is posted at all amenities stating occupancy limits (25), health recommendations, and social distancing requirements. The department has been closely following outdoor recreation guidance from state and local health authorities. Basketball courts remain closed due to the nature of contact while playing.

Public Health Guidance For Memorial Park Dog Run

To enter, guests must comply with the following COVID-19 safety measures



All park users must remain 6-feet apart at all times; no more than 25 people are allowed at any time.



Wash your hands thoroughly before and after each visit.

No personal chairs are permitted at this time.

Please avoid the urge to pet other dogs, however irresistible they may be.



ci.wilsonville.or.us

Community Center Updates

For the past 6 weeks, Community Center staff have been including weekly uplifting notes to the 90 home-delivered meal clients. At a time when socialization is limited, staff wanted to make sure seniors knew they were being thought of, even when we weren't able to see them in person. Many clients have been saving the fun notes to put on display at their residence.



We are just a phone call
away if you need a friend
503-682-3727.
Community Center Staff



Other Community Center Updates:

- Meal Delivery program continues to serve 90+ seniors in our community
- Fitness Specialist, Brad Moore began virtual personal training with clients

Upcoming:

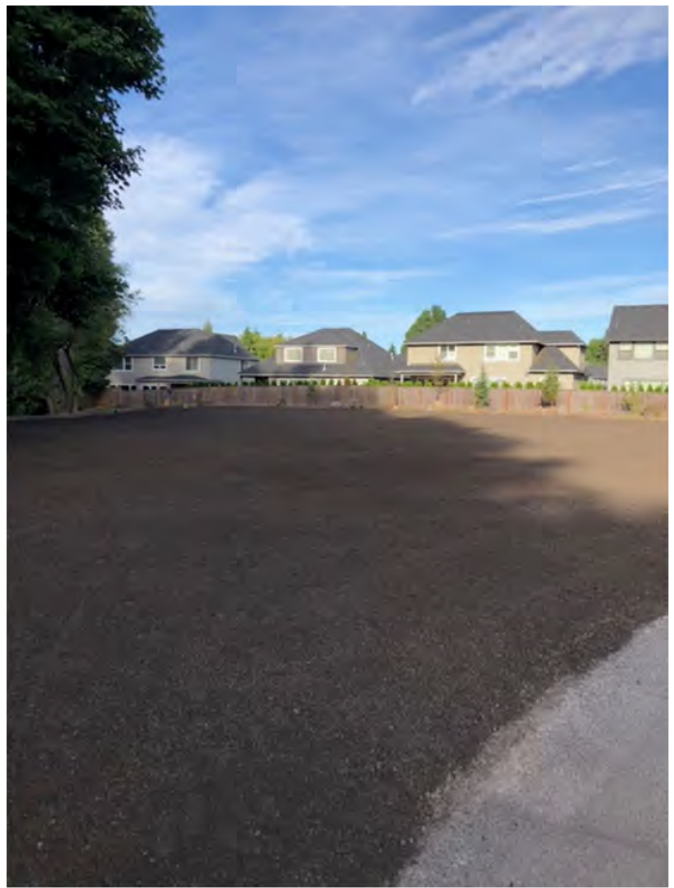
Summer Camp Registration: Recreation Coordinator, Erica Behler has been working with camp providers to implement policies and procedures that adhere to Oregon Health Authority Summer Camp guidelines. Changes this summer will include the implementation of smaller group sizes, increased sanitation practices, and modified activities to promote social distancing. Strict daily attendance logs and at home daily fever checks will be implemented for contact tracing purposes. Each camp provider has submitted a proposal and a communicable disease management plan which will be reviewed by Parks & Recreation staff. It is anticipated that Summer Camp registration could open as early as June 12. Summer Camps will begin the week of July 6. For more information, please visit WilsonvilleParksandRec.com/SummerCamps

May 2020

Parks Maintenance Updates:

- Re-surfaced river shelter parking lot
- Put new roofing on Town Center Park playground
- Prepared and opened dog park
- Prepared and opened tennis/pickleball courts
- Installed new plantings at Memorial Park entrance
- Sprayed weeds with WeedTechnics Weed Steamer
- Routines maintenance such as trash, mowing, cleaning bathrooms, etc...





MONTHLY NEWS

City of Wilsonville Police

VOLUME 3 | ISSUE 5 | PUBLISHED JUNE 10, 2020 | **May 2020**



Officer Corey Hogg had a busy night on May 20. He helped save a life through CPR efforts early in his shift, and then moved to helping this couple find a hotel after they became stranded in Wilsonville due to car trouble.



COVID-19, Stay at Home/Save Lives, and Social Distancing, all still a thing. During May, many people organized birthday drive-by cheers for loved ones. Along with Tualatin Valley Fire & Rescue, we were happy to help celebrate the occasions.



Deputy Jodi Westerman retired from the Sheriff's Office in May. Prior to having a dedicated traffic position in Wilsonville, the Sheriff's Traffic Unit rotated through the police department. Deputy Westerman spent many a month patrolling Wilsonville's streets. She was part of our family and made a difference. Best of everything to you, Deputy Westerman! Thank you for your years of service (25 in all).

We've boosted patrol in many area neighborhoods, particularly during late night and early morning hours. Wilsonville has experienced a recent increase in thefts from and of vehicles. We are making every effort to catch up with the persons responsible. Things the public can do to help avoid or mitigate falling victim are removing articles from and locking vehicles, closing and locking garages, and reporting suspicious persons or vehicles in neighborhoods at the time of occurrence.



Thank you for the hand sanitizer, Sig Sauer!

We love this. Thank you.



WILSONVILLE MONTHLY ACTIVITY REPORT May 2020



CITY OF WILSONVILLE POLICE DEPARTMENT
30000 SW Town Center Loop
Wilsonville, OR 97070

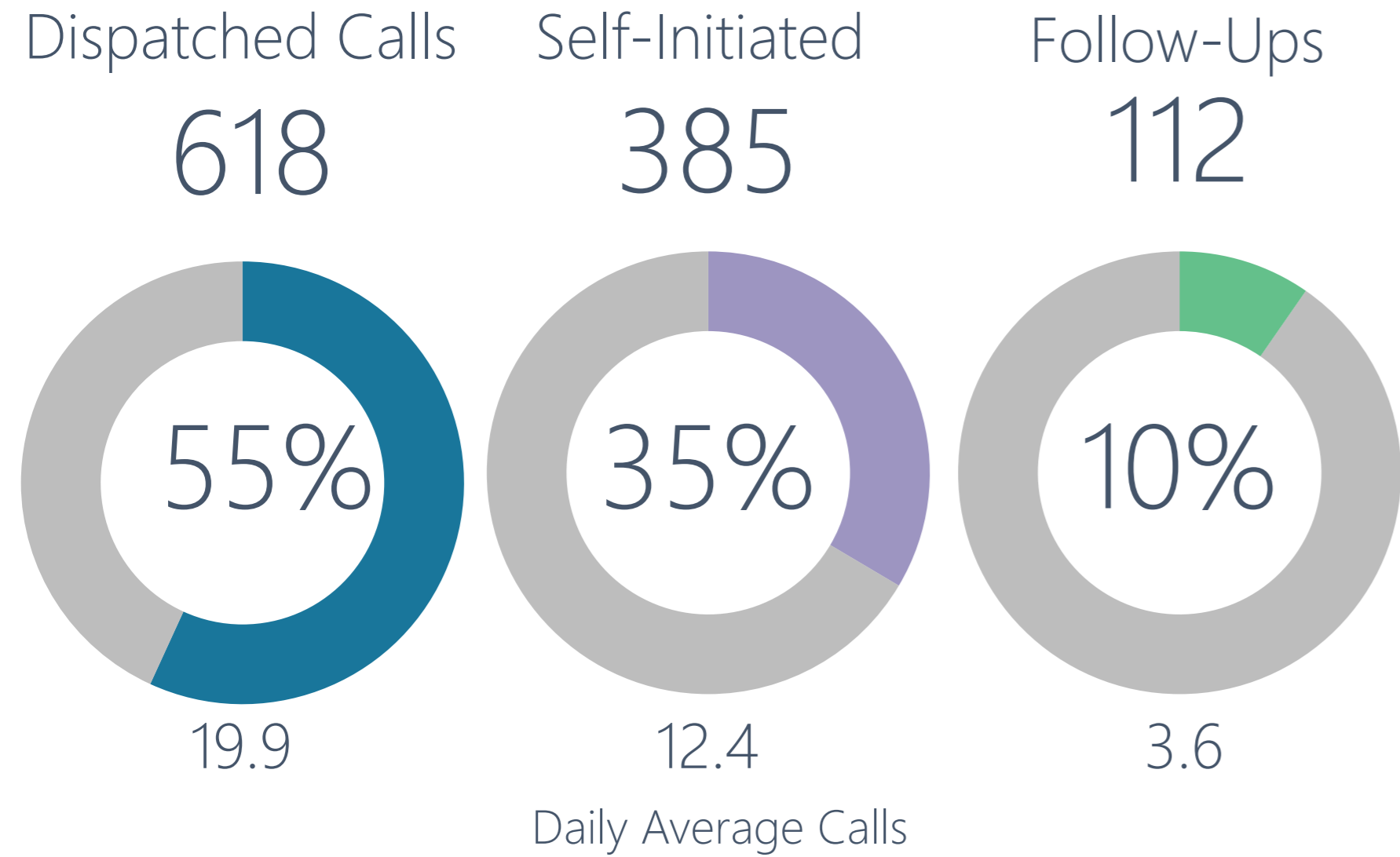
In Partnership with



**Clackamas County
Sheriff's Office**

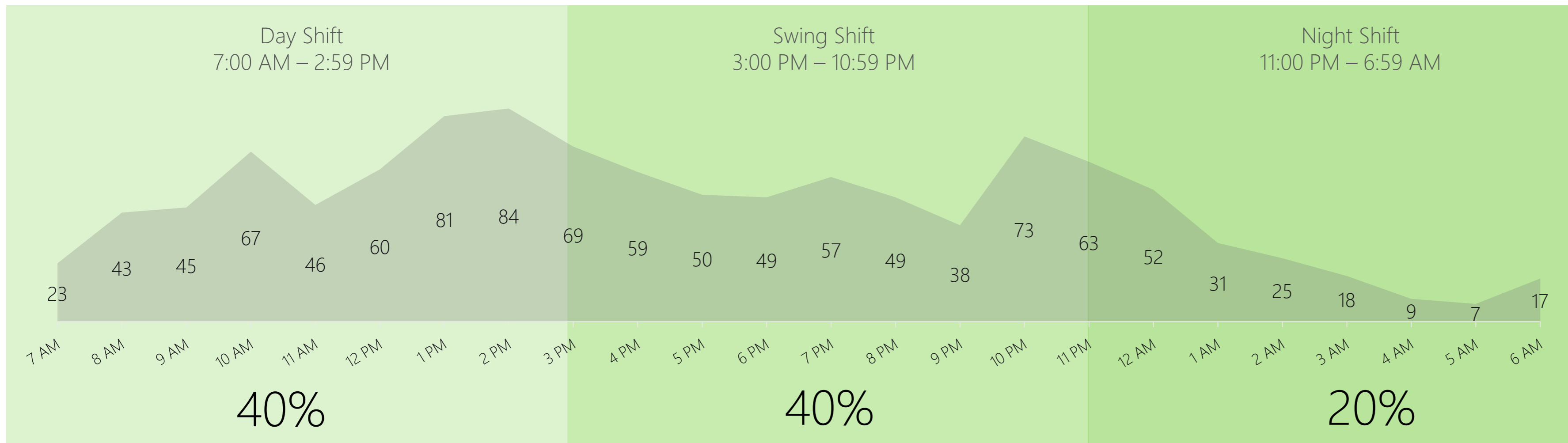
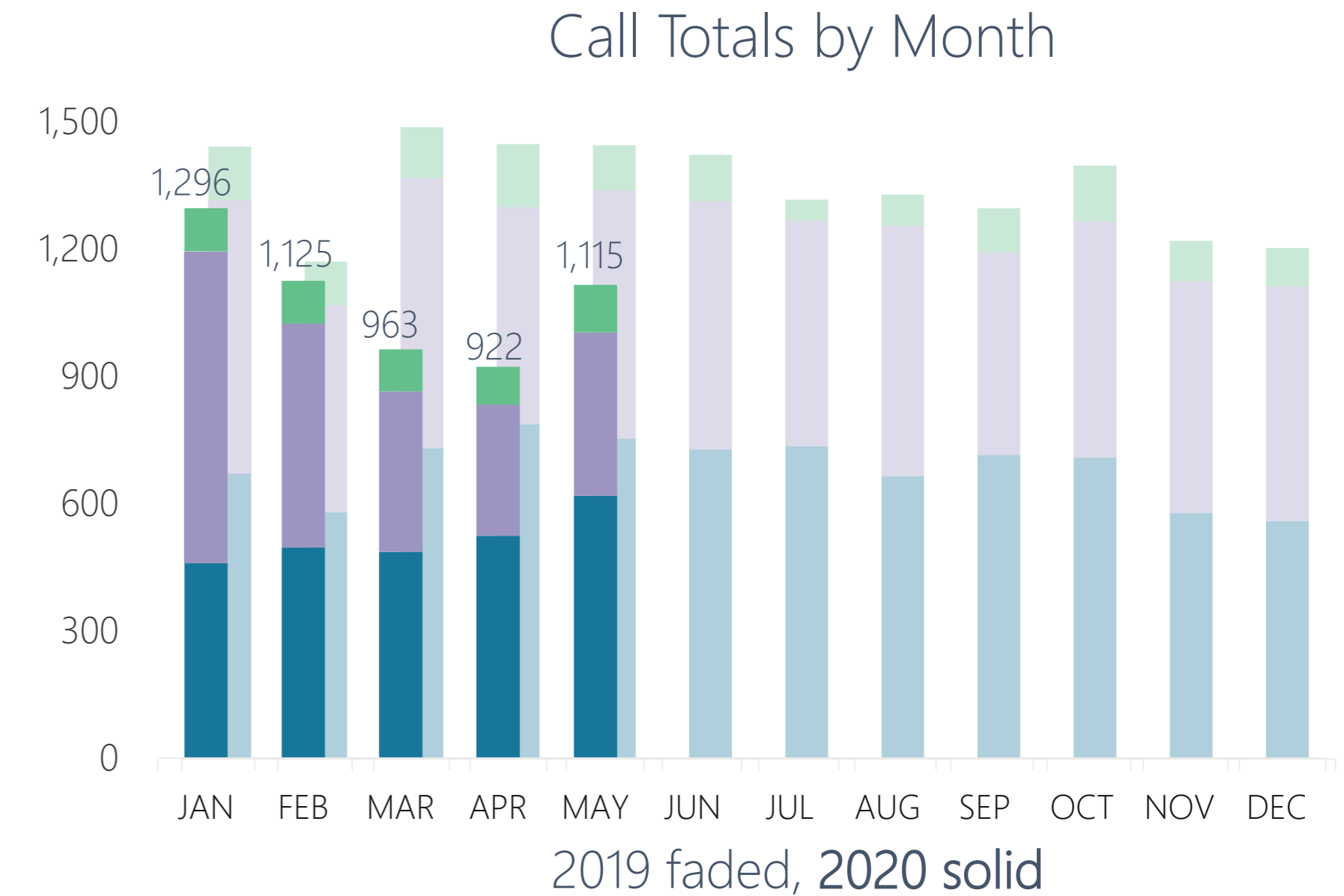
LE Calls for Service in the City of Wilsonville – Totals & Median Response Times

May 2020



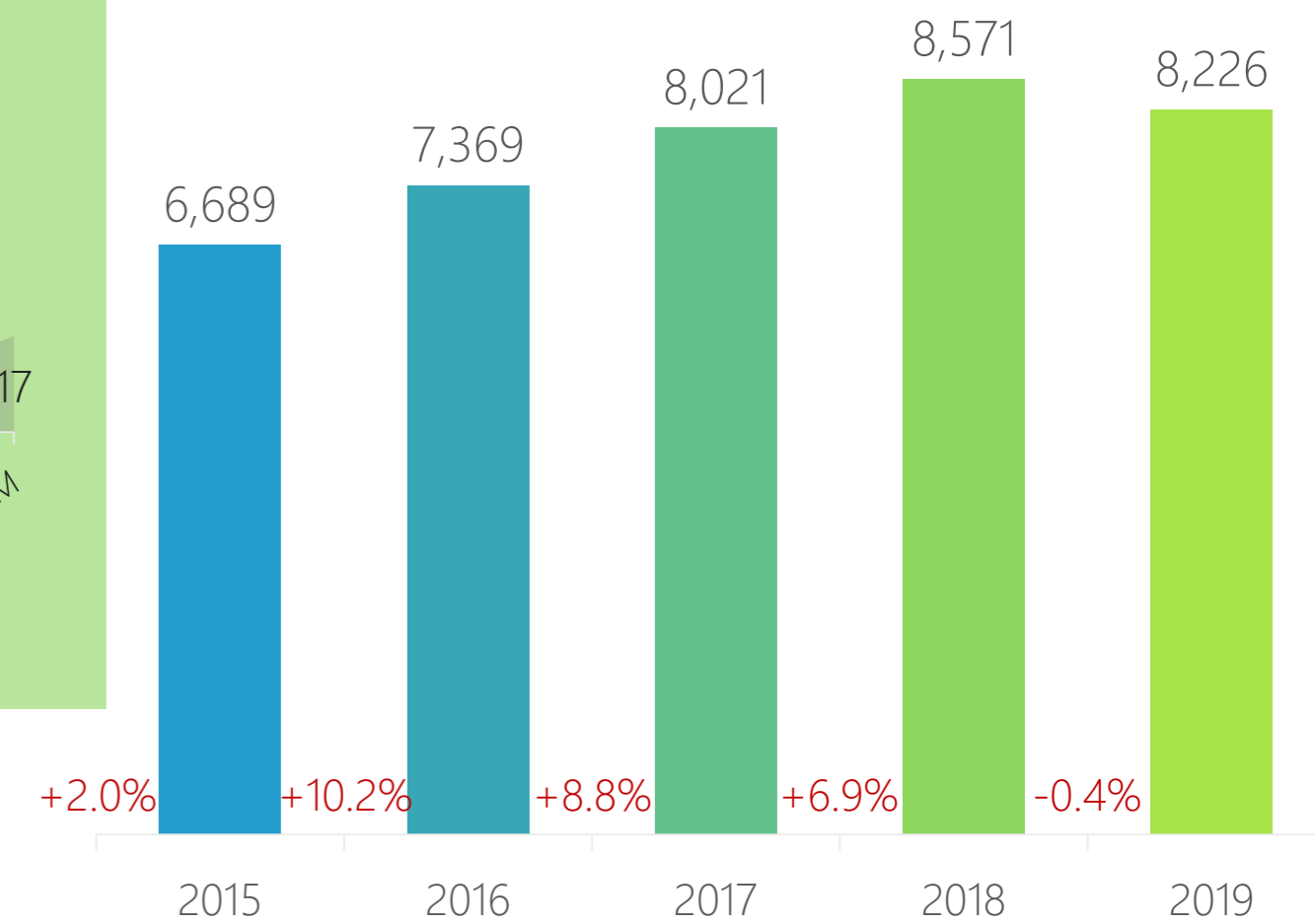
Median Hold & Response Times

	All Calls	Priority 1 & 2 Calls
Input to Dispatch (Hold Duration)	1:13	:43
Dispatch to Arrival (Response Duration)	5:03	5:01



Dispatched Calls for Service Breakdown by Hour of Day & Shift Time Groupings
(not actual breakdown of Wilsonville PD shift schedules)

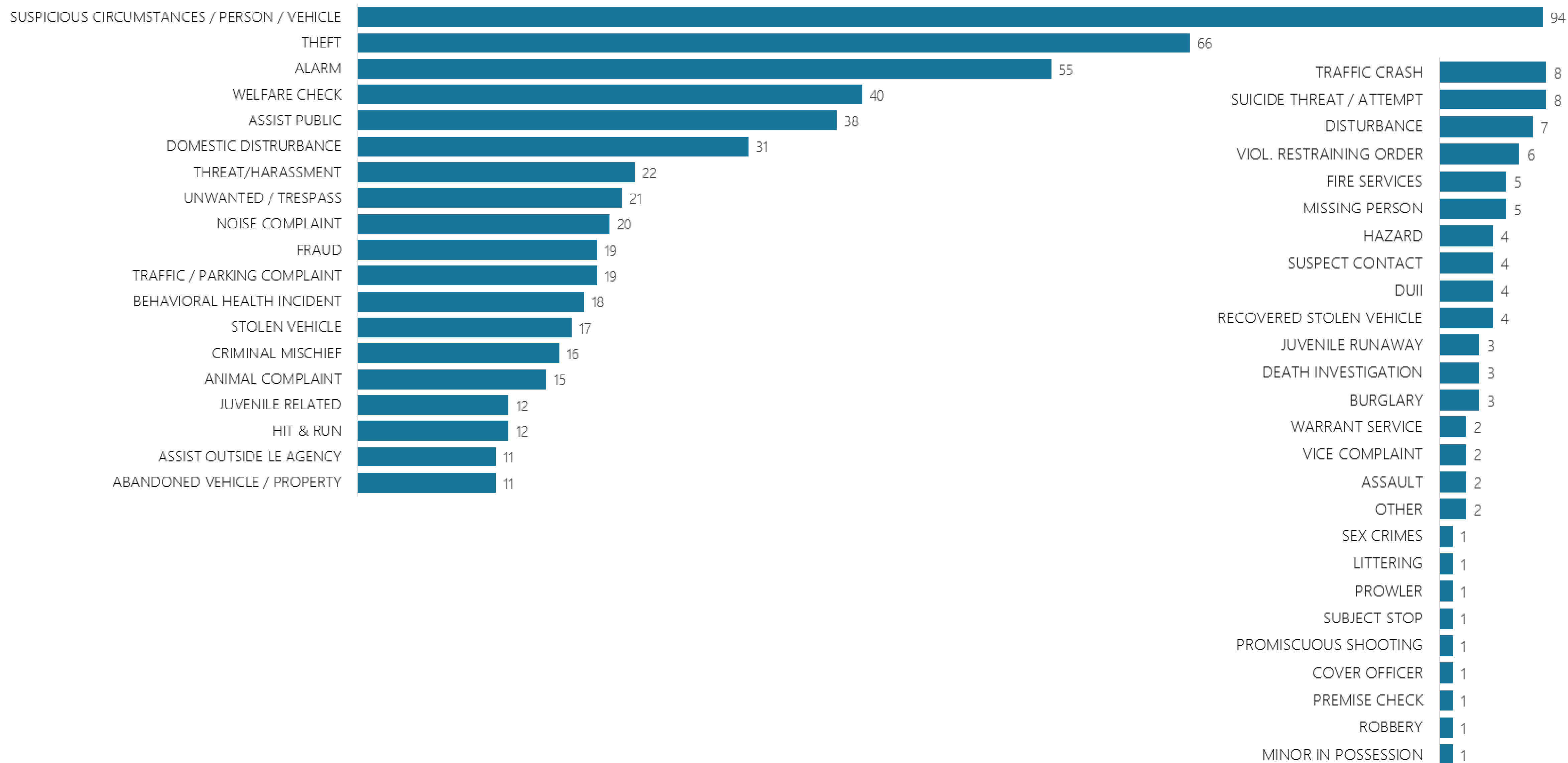
A Historical Look at Total Calls by Year



LE Calls for Service in the City of Wilsonville – Call Type Breakdown - Dispatched Calls

May 2020

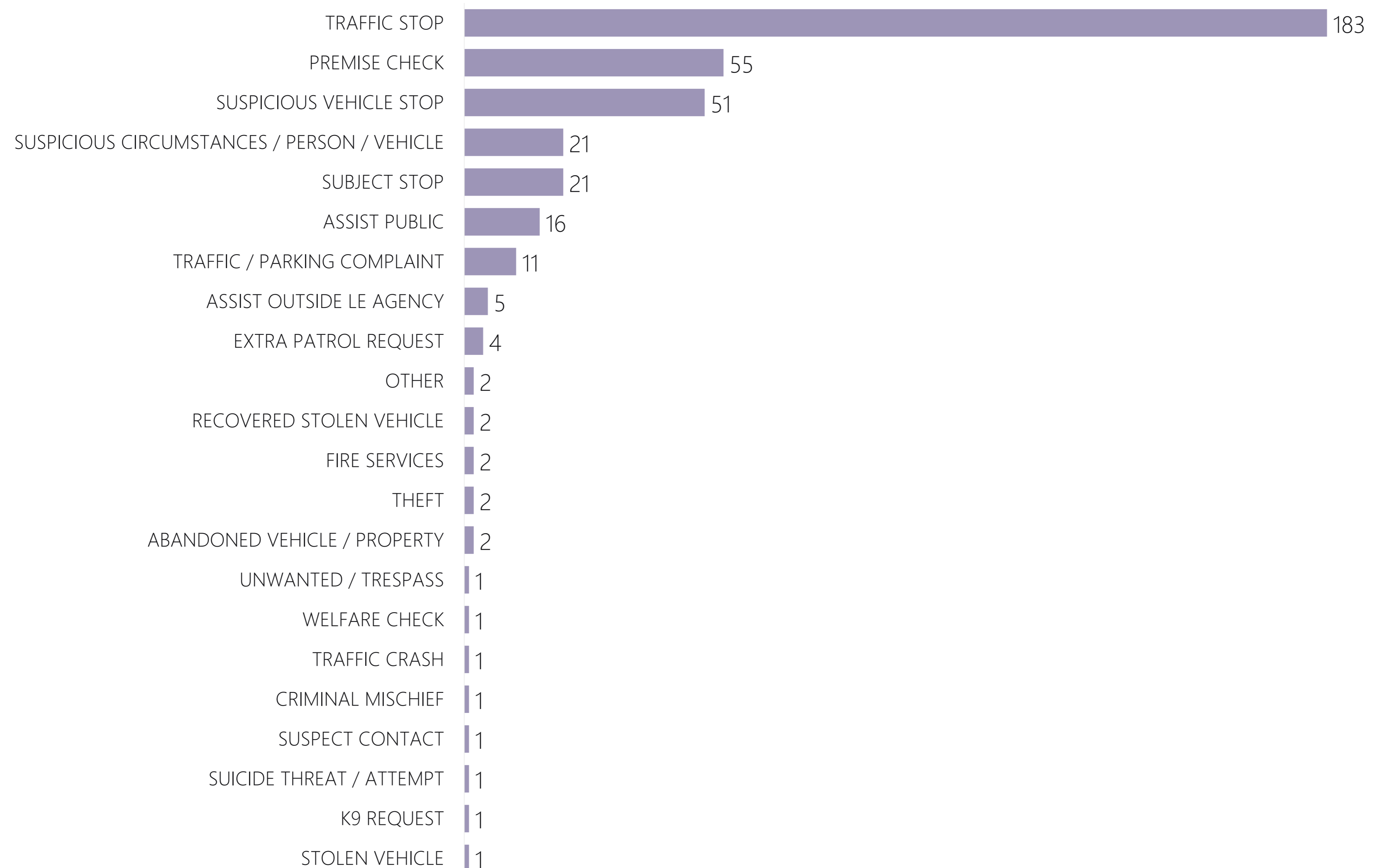
Dispatched Call Types



LE Calls for Service in the City of Wilsonville – Call Type Breakdown – Self-Initiated Calls

May 2020

Self-Initiated Call Types



LE Calls for Service in the City of Wilsonville – Call Type Breakdown Tables (Dispatched)

May 2020

DISPATCHED CALL TYPE	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2020 Monthly Trend Line
ABANDONED VEHICLE / PROPERTY	14	10	11	17	11								
ALARM	38	48	52	40	55								
ANIMAL COMPLAINT	3	4	4	3	15								
ASSAULT	6	5	4	4	2								
ASSIST OUTSIDE LE AGENCY	8	3	18	3	11								
ASSIST PUBLIC	24	32	36	28	38								
BEHAVIORAL HEALTH INCIDENT	7	24	18	8	18								
BURGLARY	8	7	7	1	3								
COVER OFFICER	6	1	0	0	1								
CRIMINAL MISCHIEF	7	7	5	10	16								
DEATH INVESTIGATION	0	4	1	0	3								
DOMESTIC DISTURBANCE	16	19	32	21	31								
DUII	6	10	3	3	4								
EXTRA PATROL REQUEST	2	1	0	1	0								
FIRE SERVICES	6	7	8	2	5								
FRAUD	16	19	16	21	19								
HAZARD	3	7	3	6	4								
HIT & RUN	8	11	10	13	12								
JUVENILE RELATED	18	17	15	13	12								
JUVENILE RUNAWAY	0	0	8	4	3								
LITTERING	1	3	0	0	1								
MARINE PATROL	0	1	0	1	0								
MENACING	1	0	0	1	0								
MINOR IN POSSESSION	6	2	4	1	1								
MISSING PERSON	5	5	6	5	5								
NOISE COMPLAINT	10	9	17	16	20								
OTHER	0	2	1	5	2								

(List part 1 of 2)

LE Calls for Service in the City of Wilsonville – Call Type Breakdown Tables (Dispatched)




















May 2020

DISPATCHED CALL TYPE	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2020 Monthly Trend Line
OVERDOSE	1	0	0	0	0								
PREMISE CHECK	1	1	0	3	1								
PROMISCUOUS SHOOTING	1	0	2	3	1								
PROWLER	0	1	2	0	1								
PURSUIT	0	0	0	1	0								
RECOVERED STOLEN VEHICLE	1	1	2	2	4								
SEX CRIMES	4	0	2	3	1								
STOLEN VEHICLE	1	8	9	9	17								
SUBJECT STOP	0	0	0	0	1								
SUICIDE THREAT / ATTEMPT	3	16	8	14	8								
SUSPECT CONTACT	1	0	0	3	4								
SUSPICIOUS CIRCUMSTANCES / PERSON / VEHICLE	71	69	55	57	94								
SUSPICIOUS VEHICLE STOP	2	0	0	0	0								
THEFT	47	40	36	75	66								
THREAT/HARASSMENT	15	19	20	29	22								
TRAFFIC / PARKING COMPLAINT	13	11	9	25	19								
TRAFFIC CRASH	11	13	11	6	8								
TRAFFIC STOP	1	0	0	0	0								
UNWANTED / TRESPASS	19	17	13	20	21								
VICE COMPLAINT	3	7	4	1	2								
VIOL. RESTRAINING ORDER	1	1	1	5	6								
WARRANT SERVICE	2	1	1	0	2								
WELFARE CHECK	32	26	24	28	40								
DISTURBANCE	11	7	8	11	7								
ROBBERY	0	0	0	0	1								
Grand Total	460	496	486	522	618								

(List part 2 of 2)

LE Calls for Service in the City of Wilsonville – Call Type Breakdown Tables (Self-Initiated)

May 2020

SELF-INITIATED CALL TYPE	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2020 Monthly Trend Line
ABANDONED VEHICLE / PROPERTY	1	8	5	7	2								
ALARM	1	0	0	0	0								
ANIMAL COMPLAINT	0	1	0	2	0								
ASSAULT	1	0	0	0	0								
ASSIST OUTSIDE LE AGENCY	7	1	2	3	5								
ASSIST PUBLIC	22	17	16	22	16								
CRIMINAL MISCHIEF	6	2	0	0	1								
DUII	0	0	1	0	0								
EXTRA PATROL REQUEST	15	9	0	3	4								
FIRE SERVICES	1	0	0	1	2								
FRAUD	2	2	1	0	0								
HAZARD	2	0	3	1	0								
HIT & RUN	0	1	2	1	0								
JUVENILE RELATED	1	1	2	0	0								
MINOR IN POSSESSION	3	2	0	0	0								
OTHER	1	0	4	5	2								
PREMISE CHECK	99	57	83	88	55								
PURSUIT	1	1	0	1	0								
RECOVERED STOLEN VEHICLE	1	1	1	4	2								

(List part 1 of 2)

LE Calls for Service in the City of Wilsonville – Call Type Breakdown Tables (Self-Initiated)

May 2020

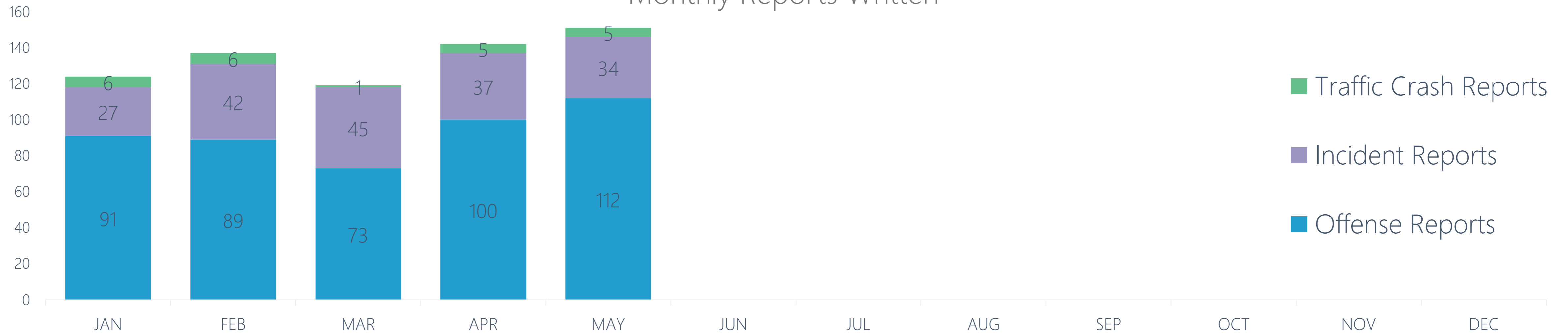
SELF-INITIATED CALL TYPE	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2020 Monthly Trend Line
SEX CRIMES	0	0	3	0	0								
STOLEN VEHICLE	0	0	0	0	1								
SUBJECT STOP	30	19	12	19	21								
SUICIDE THREAT / ATTEMPT	0	0	0	0	1								
SUSPECT CONTACT	3	4	5	5	1								
SUSPICIOUS CIRCUMSTANCES / PERSON / VEHICLE	8	4	5	18	21								
SUSPICIOUS VEHICLE STOP	84	62	52	60	51								
THEFT	5	2	1	2	2								
THREAT/HARASSMENT	1	0	2	1	0								
TRAFFIC / PARKING COMPLAINT	24	17	10	8	11								
TRAFFIC CRASH	4	3	1	1	1								
TRAFFIC STOP	402	308	161	53	183								
UNWANTED / TRESPASS	0	1	0	2	1								
VICE COMPLAINT	0	0	0	1	0								
WARRANT SERVICE	9	2	3	1	0								
WELFARE CHECK	1	2	2	0	1								
K9 REQUEST	0	0	1	0	1								
DISTURBANCE	0	1	0	0	0								
Grand Total	735	528	378	309	385								

(List part 2 of 2)

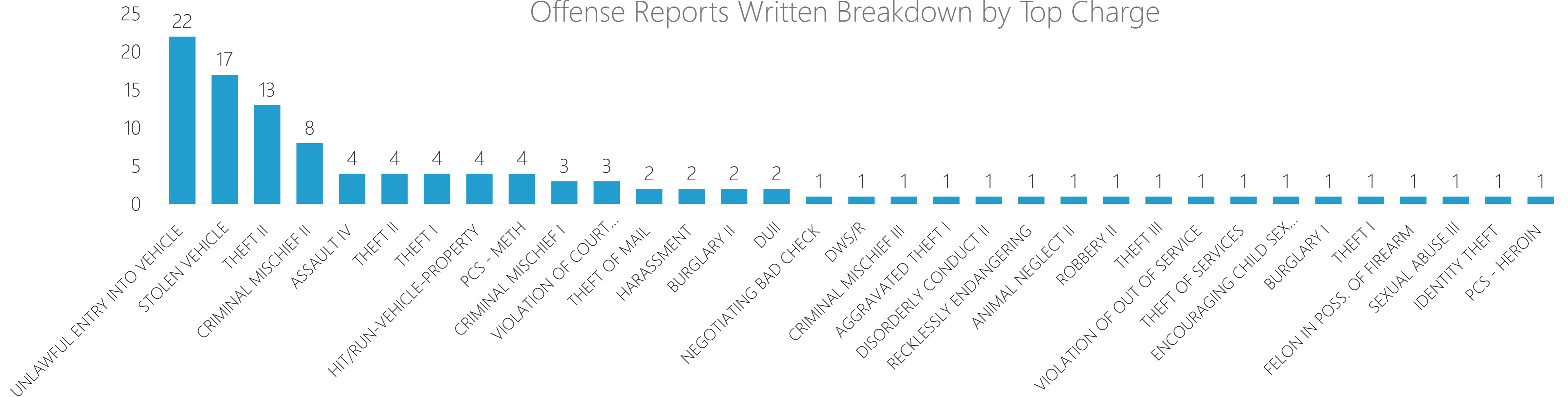
LE Reports Written in the City of Wilsonville

May 2020

Monthly Reports Written



Offense Reports Written Breakdown by Top Charge



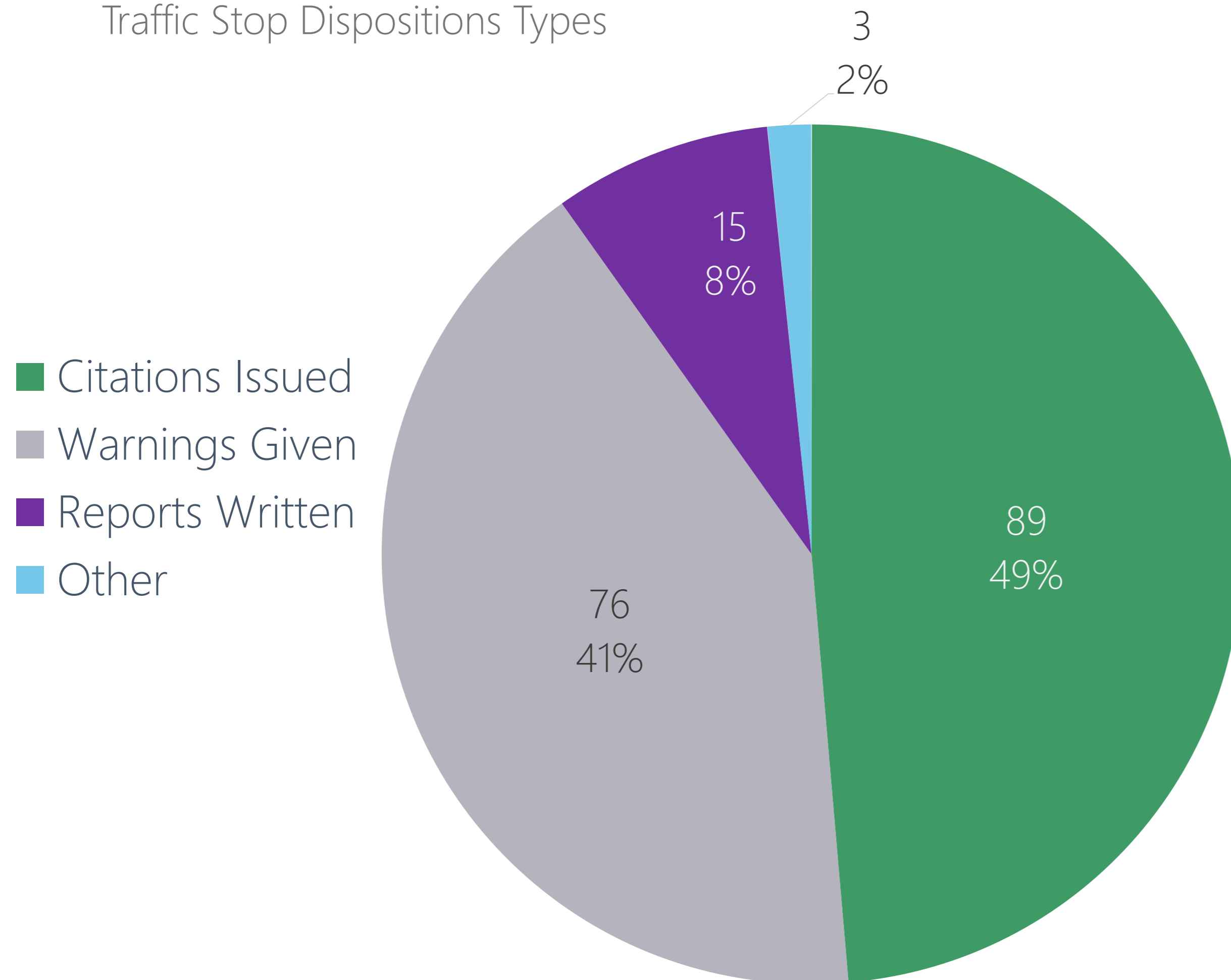
Traffic Enforcement in the City of Wilsonville

May 2020

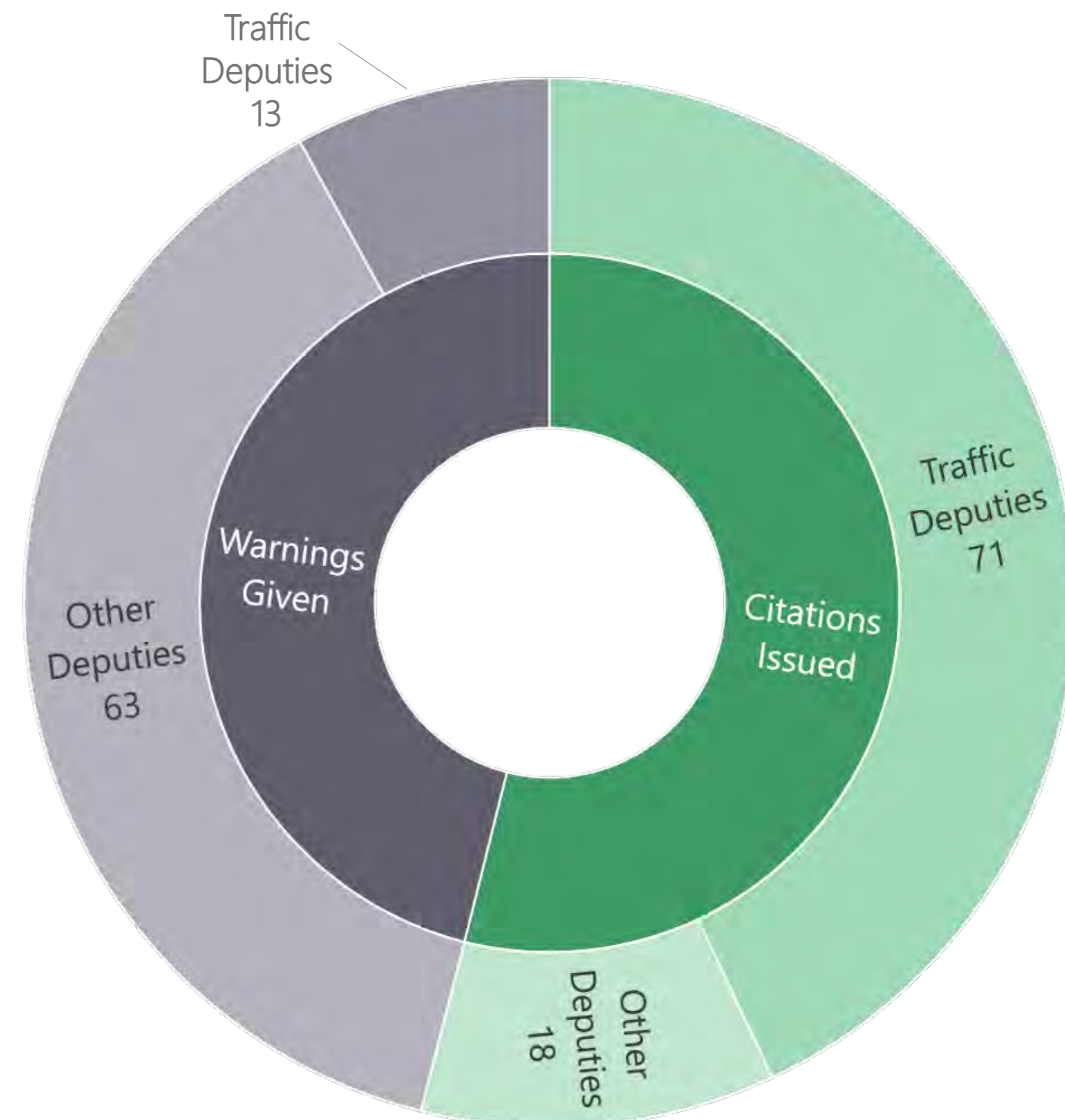
Traffic Stop Dispositions

In May 2020, **183** traffic stops were made within the city limits, resulting in **89** citations issued, **76** warnings given, and **15** offense/incident reports created. Of the **89** citations issued, **141** charges were included (see next slide).

Traffic Stop Dispositions Types



Warnings & Citations Issued Broken Down by Deputy Type

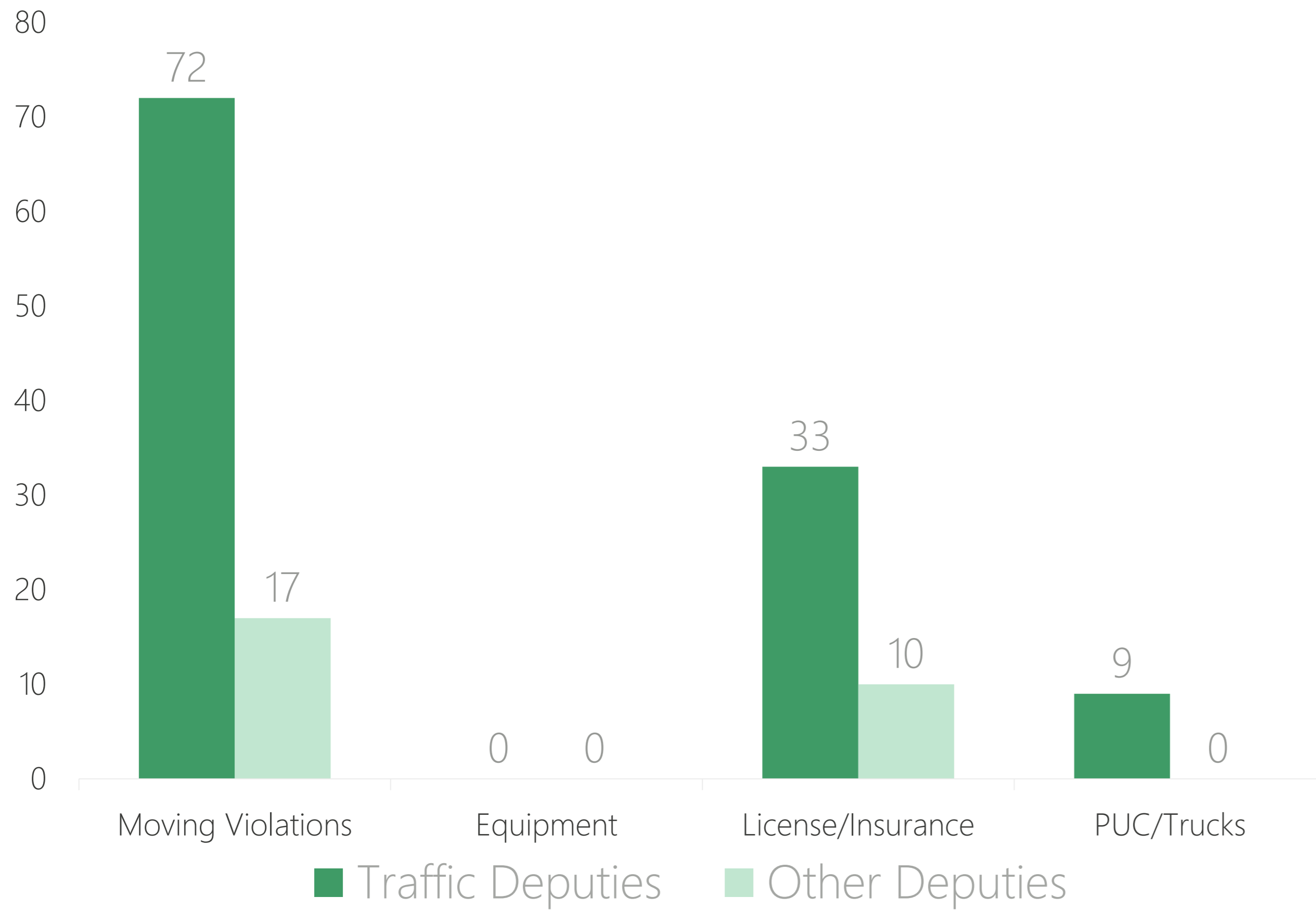


Traffic Enforcement in the City of Wilsonville

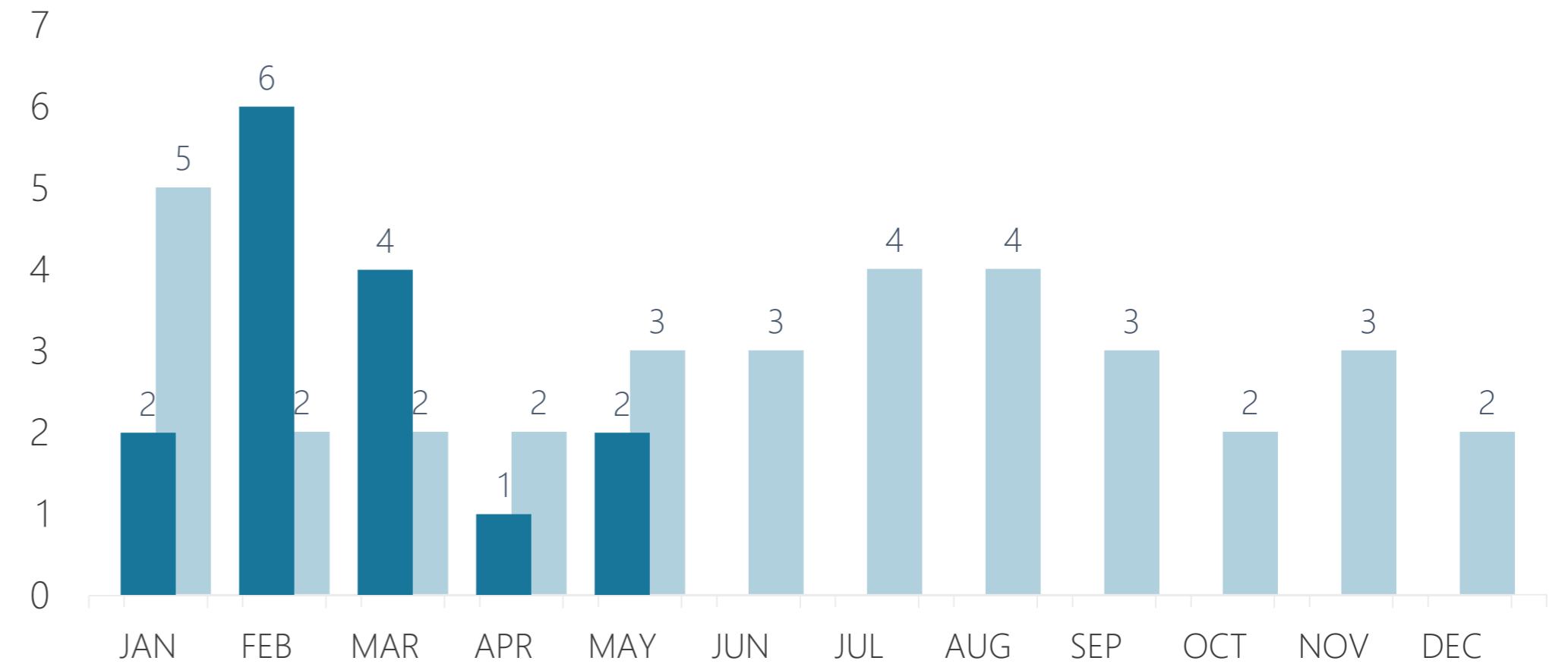
May 2020

Citation Types Issued:

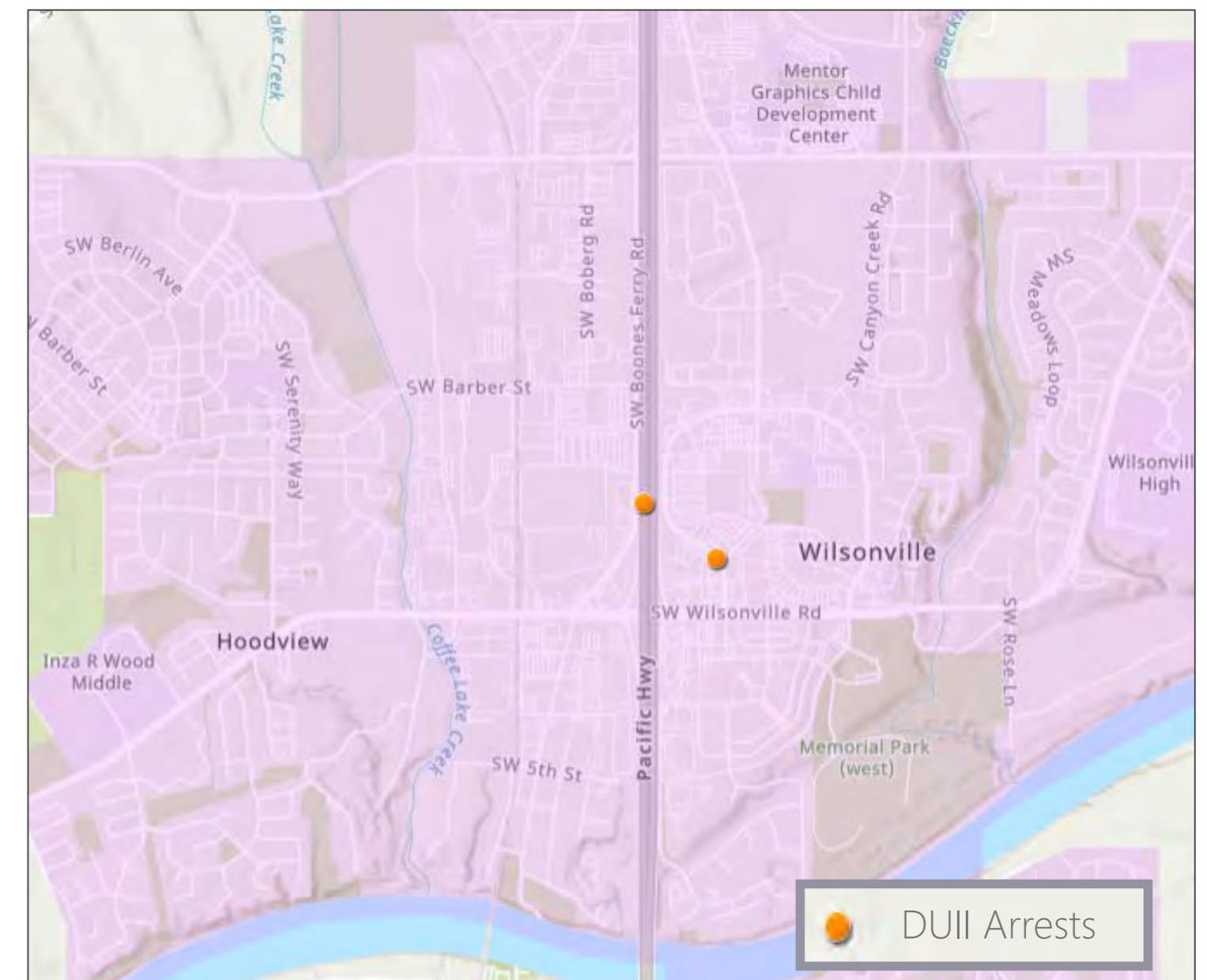
Of the **89** citations issued, **141** charges were included in the following types:



DUII Arrests:



2019 faded, 2020 solid



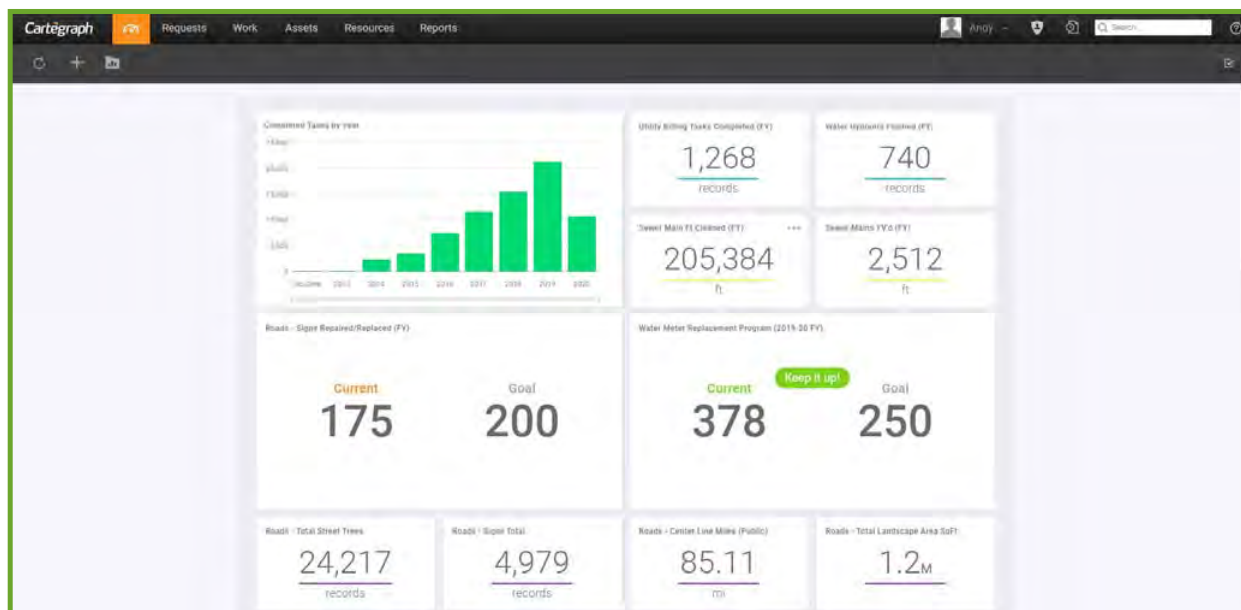


MAY 2020 MONTHLY REPORT

From The Director's Office:

Cartegraph OMS (*Operations Management Software*) is the City's asset management system/ work order system used to track detailed information and work completed on over 50 different asset types. In addition to the standard desktop version, Cartegraph has a robust mobile application that allows staff to look up assets, track resources and expenses and complete assigned tasks from the field. This existing capability allowed the department to transition to current social distancing standards with minimal impact.

One of the inherent features any asset management system, is the ability to accurately track service tasks and cost associated with maintaining the City's assets. This information in turn allows us to easily develop maintenance plans with accurate cost projects, maintenance intervals and required resources for each of our assets. Cartegraph is also integrated with the City's GIS database and any changes made to assets in either system transfers to the other. This provides the City with one shared GIS/Asset database that is updated daily to reflect any changes in the overall asset system. These changes can consist of new assets as a result of new construction or simply from data errors found in the field that need correction.



Cartegraph Dashboard showing Key Performance Indicators (KPI's) and data metrics

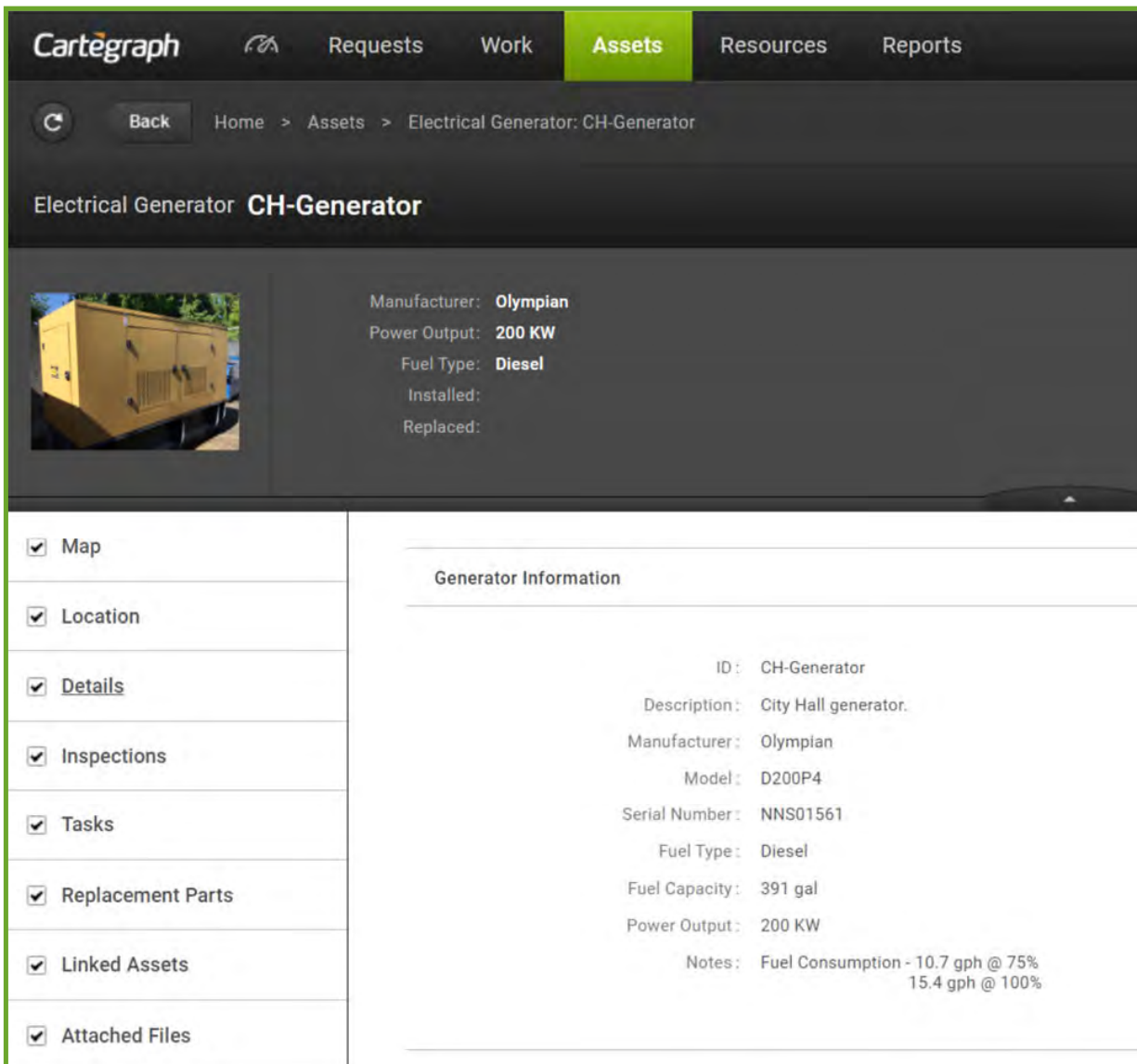
Best Regards,
Delora Kerber, PE
Public Works Director

Facilities

Asset Management—Generators

The Facilities Department continues to utilize the City's Asset Management Software (Cartegraph) to assist in tracking the condition of assets, as well as being a depository for baseline measurements and ongoing inspection reports. The latest example of this was the annual emergency generator service reports. To be in compliance with the National Fire Protection Association (NFPA) 110 and 111 Standards, the City must have an annual service/inspection performed on each of the eight Emergency Generators.

In addition, records need to be created and maintained for all inspections, tests, repairs, and modifications. The Facilities Department captures and enters general information and a photo of each generator into the Cartegraph program.



The screenshot displays the Cartegraph software interface for an asset named "Electrical Generator CH-Generator". The interface is organized into several sections:

- Navigation:** A top menu with "Requests", "Work", "Assets" (highlighted), "Resources", and "Reports". Below it is a breadcrumb trail: "Home > Assets > Electrical Generator: CH-Generator".
- Asset Overview:** A dark header with the asset name "Electrical Generator CH-Generator". Below this is a photo of a yellow generator and a list of key attributes:
 - Manufacturer: **Olympian**
 - Power Output: **200 KW**
 - Fuel Type: **Diesel**
 - Installed:
 - Replaced:
- Left Sidebar:** A list of tabs for further exploration:
 - Map
 - Location
 - Details
 - Inspections
 - Tasks
 - Replacement Parts
 - Linked Assets
 - Attached Files
- Generator Information Panel:** A detailed view of the asset's specifications:
 - ID: CH-Generator
 - Description: City Hall generator.
 - Manufacturer: Olympian
 - Model: D200P4
 - Serial Number: NNS01561
 - Fuel Type: Diesel
 - Fuel Capacity: 391 gal
 - Power Output: 200 KW
 - Notes: Fuel Consumption - 10.7 gph @ 75%
15.4 gph @ 100%

Cartegraph allows us to have all of the key information for each of our asset types at our finger tips. The typical general information includes make, model, fuel, serial number, capacity and output. Additional tabs allow us more detailed information for each asset.

Facilities

Asset Management—Generators, cont'd

Once the annual services are performed by a qualified contractor, the Facilities Supervisor enters the invoice amounts associated with each generator. The entries below shows the generator has received a full maintenance service as well as two transfer switch inspections.

Total Cost	Productivity	Labor	Equipment	Material	Other	
\$2,379	Cost per Unit \$0.00	Labor Hours 1	Labor Cost \$20	Equipment Cost \$9	Material Cost \$0	Other Cost \$2,350

Short Description	Vendor	Purchase Order	Usage	Cost	Entry Date
Annual Service	Peterson Power Systems	Inv # SW290059640	0 hr	\$1,830.00	5/20/2020 12...
Annual Generator Service- Transfer Switch (2)	Peterson Power Systems	Inv #SW290059646	0 hr	\$260.00	5/20/2020 12...
Annual Generator Service- Transfer Switch	Peterson Power Systems	Inv # SW290059633	0 hr	\$260.00	5/20/2020 10...

After all service and inspections are completed, the contractor sends the Facilities Department the results reports along with recommendations for each asset. These reports are uploaded into the Cartegraph program and attached to the appropriate asset. The screen shot below shows the separate attachments for Fuel Analysis, Transfer Switch Inspections 1 & 2, Load Bank Tests, and the full Inspection Report complete with pictures.

This information will allow the department to better track life cycle cost and better project future replacement time lines.

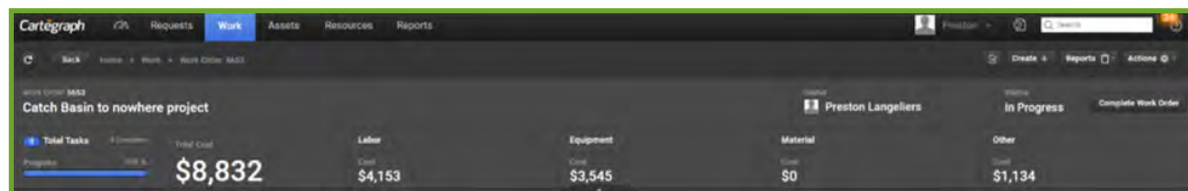
File Name	Size	Uploader	Timestamp
City Hall Fuel Analysis.pdf	15.5 KB	mbaker	5/29/2020 8:57:47 AM
City Hall Transfer Switch.pdf	0.3 MB	mbaker	5/22/2020 12:50:40 PM
City Hall Inspection Report.pdf	5.6 MB	mbaker	5/22/2020 12:49:47 PM
City Hall Transfer Switch - Lif...	0.3 MB	mbaker	5/22/2020 12:49:32 PM
City Hall Load Bank Test.pdf	0.2 MB	mbaker	5/22/2020 12:49:18 PM

Storm Water

Asset Management—Catch Basin Project

Over a three-week period, Stormwater staff attached 200 feet of pipe at the end of a catch basin that had no constructed outlet. While conducting outfall inspections staff discovered a storm water catch basin that had somehow been constructed years ago with no viable outfall. This in turn was causing erosion down the embankment of Boeckman Creek near Wilsonville Road.

Much of the success of this project being delivered on schedule and within budget can be contributed to the City's asset management software (Cartegraph). The tracking software allowed staff to accurately track their time and materials used to inspect the contractor's work, install traffic control, and install erosion control measures. Once the contract work was completed, invoices and receipts will be uploaded into Cartegraph. This will provide an all-inclusive cost summary for this project. Being able to track cost in real-time helps staff to avoid cost overruns. Additionally the information is useful when budgeting for similar projects in the future.



Category	Cost
Total Cost	\$8,832
Labor	\$4,153
Equipment	\$3,545
Material	\$0
Other	\$1,134

Above is computer screen shot showing the costs for the Catch Basin project



Project work site along Wilsonville Road.

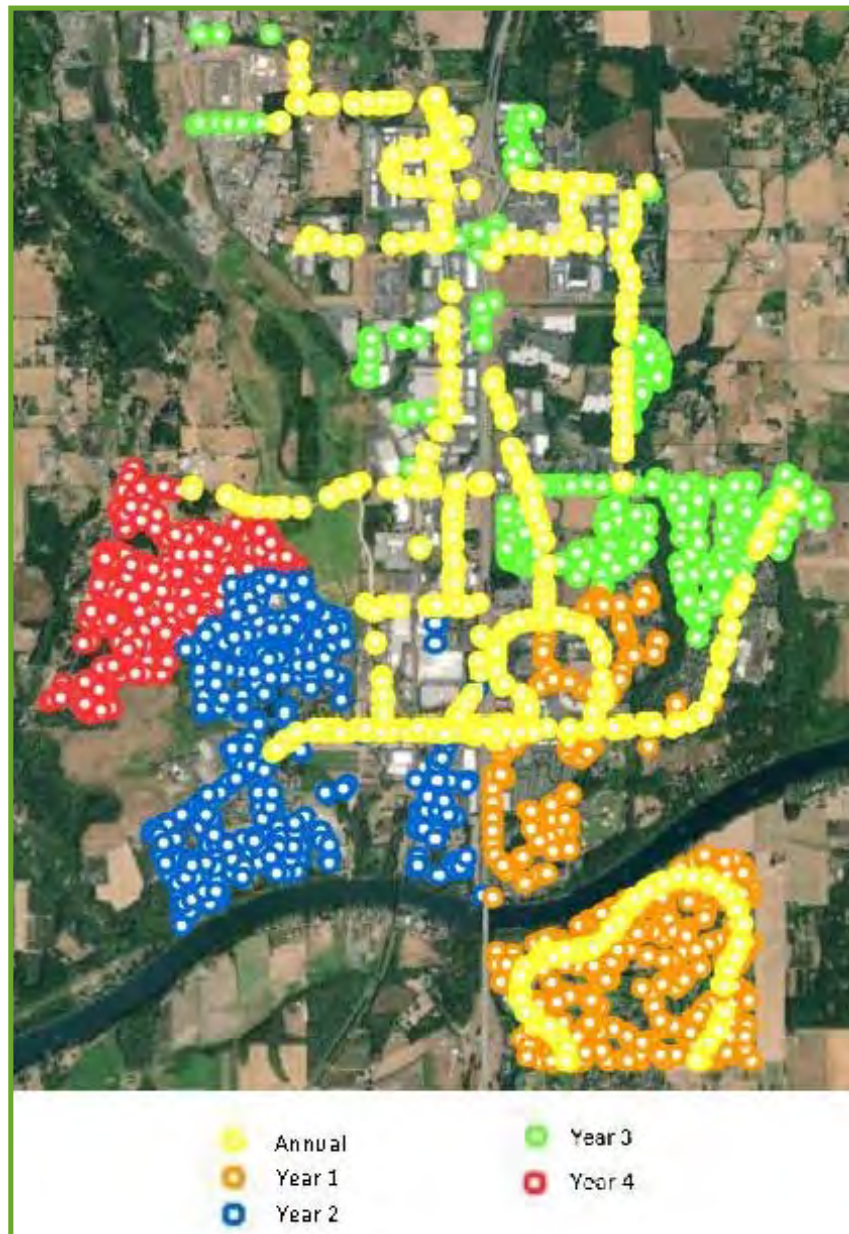


Looking west towards Boeckman Creek with the temporary erosion control measures in place.

Stormwater

Asset Management—Annual Maintenance Activities

The Stormwater Division uses the City's Asset Management software (Cartegraph) to manage daily activities as well as annually scheduled maintenance tasks. Each year on July 1, Cartegraph automatically creates work orders for assets to be maintained in the following fiscal year. This automatic generation of work orders helps ensure the consistent and comprehensive maintenance of our assets. Stormwater catch basins are divided up into annual maintenance and four-year rotation maintenance activities. The integration with the GIS mapping system also allows us to visually represent the work locations for better planning of assignments and activities.



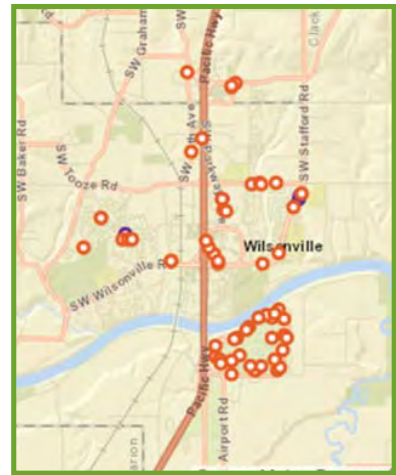
Asset management map depicting the various assets maintenance intervals

Roads

Asset Management—Sign Inspections and Replacements

One of the ways the Roads Division utilizes the City’s Asset Management software (Cartegraph) is for the inspections of the 4,979 publicly owned road signs. When staff inspect a sign and notice it needs replacement or requires cleaning, they will create a task in Cartegraph. Once the task is created, it is assigned to a staff member. When that task is complete, staff enters the amount of labor hours, equipment time and materials used to complete the task. This information is useful in determining the appropriate budget needed to maintain the City’s infrastructure.

This year 63 signs are scheduled for replacement. Using Cartegraph, a report can be produced which identifies the type and size of the sign that need to be replaced. This allows staff the ability to place one order for multiple signs which saves staff time looking up each sign individually to gather the same information.



2020 scheduled sign replacements

Task ID	Activity	Asset	Priority	Status	Start Date	Stop Date
85469	Replace	Sign 2177	None	Completed	1/16/2020	1/16/2020

Total Cost	Productivity	Labor	Equipment	Material	Other	
\$122	Cost per Unit \$0.00	Labor Hours 2	Labor Cost \$58	Equipment Cost \$26	Material Cost \$38	Other Cost \$0

Map

Search by address

Sign replacement cost including labor, equipment and materials as well as sign location

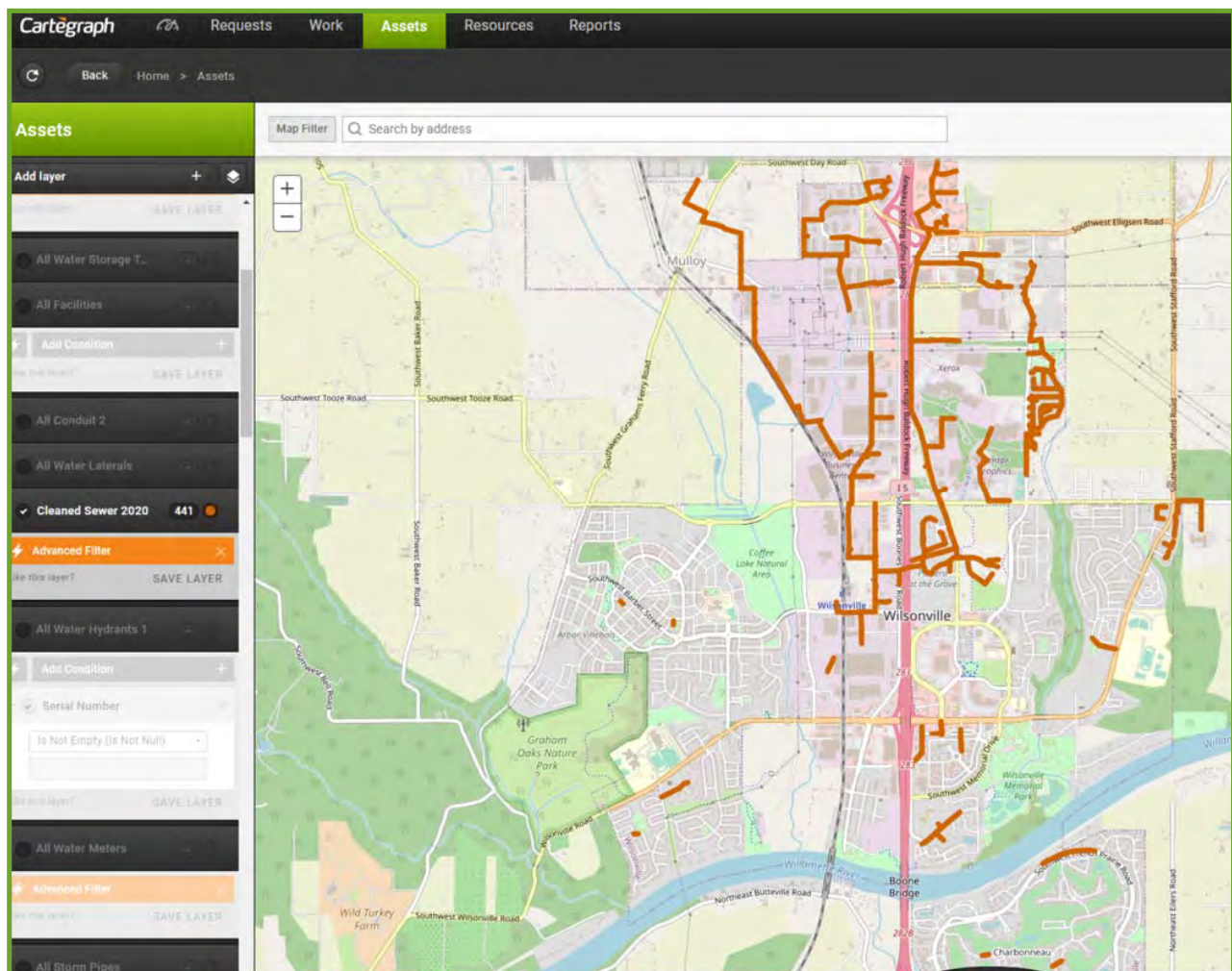


Asset management file includes a photo of the sign

Utilities

Asset Management—Sewer line cleaning

The wastewater crew has been hard at work cleaning sewer lines as part of routine maintenance and in preparation for the upcoming close circuit television (CCTV) inspections. The City's Asset Management software (Cartegraph) is an essential tool for keeping track of which lines have been cleaned and provides a place to record issues that need to be addressed. Cartegraph is also being utilized to create work orders to be assigned to the CCTV contractor and will aid in the organization of the data received from the inspections. Reports and video generated from the inspection process can now be stored and viewed within the system and the work graphically represented for better planning purposes.

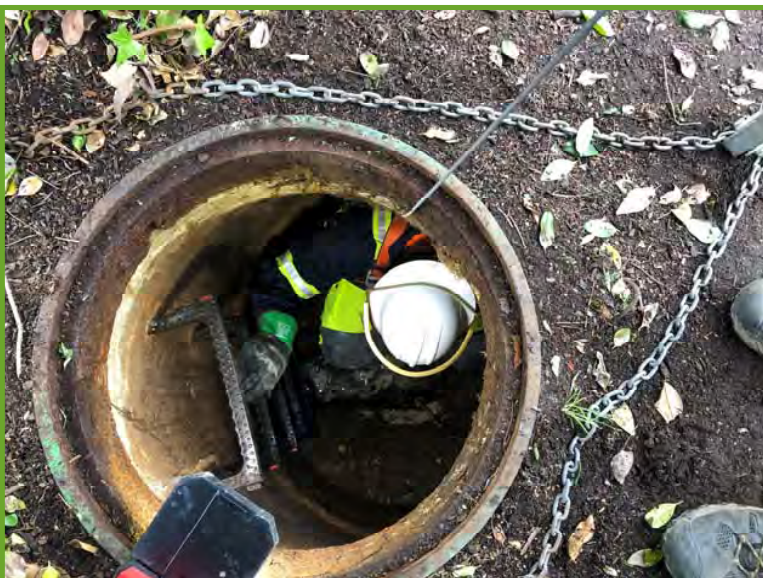


Cartegraph map representing all the sewer lines which have been cleaned to date

Utilities

Asset Management—Manhole Repair

In addition to cleaning sewer lines, the crew has tackled some very challenging manhole repairs this month. One such manhole provides service to Shari's Restaurant and McDonalds. This manhole has been a repetitive issue and required monthly cleaning to prevent the buildup of solids which could potentially cause a blockage and subsequent sewer spill. A confined space entry was performed to enter the manhole safely. Concrete was removed creating a smoother flowing channel. With the improvements made to the manhole it can now be removed from the monthly maintenance schedule.



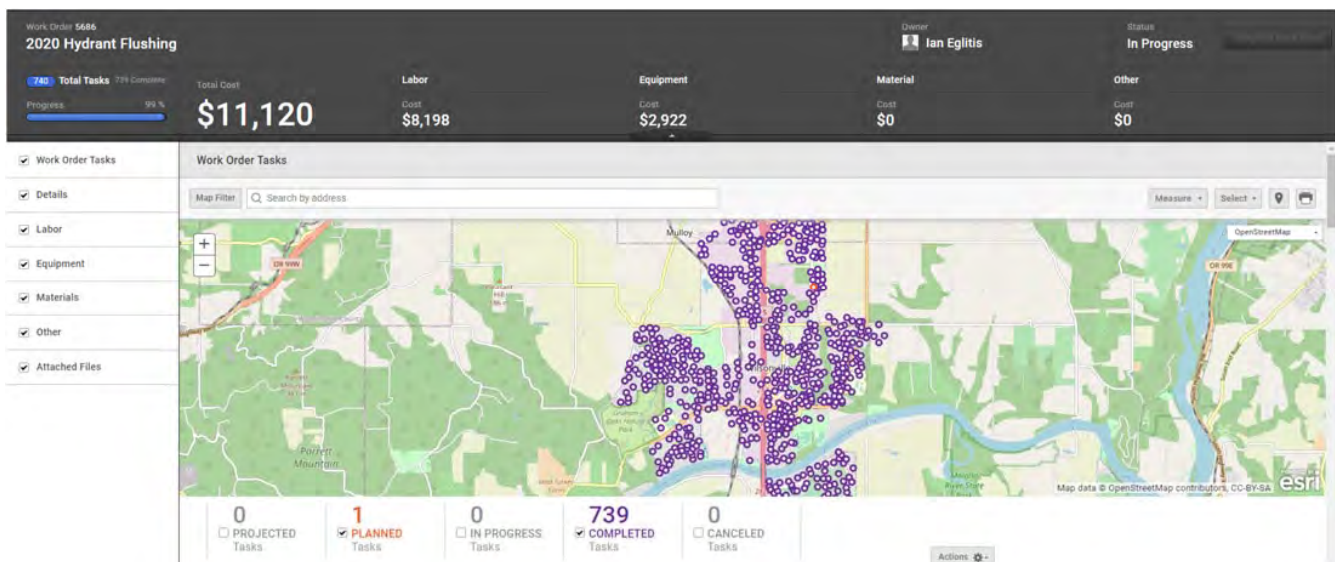
Utilities

Asset Management—Hydrant Flushing

During the month of May, the water crew's main focus was on flushing the water distribution system. The water crew flushes the entire system annually as a proactive method to maintain high quality water for our customers. Flushing the system freshens up the water and removes sediment, loose deposits and tubercles. Tubercles are the result of minerals in the water interacting with the metal of the pipes. Additionally, the flushing program provides an opportunity to inspect the condition and operation of the hydrants and blow off valves. During flushing if a hydrant is not operating properly it is repaired within a day of discovery to restore its fire protection capabilities.



The crew utilizes Cartegraph for the flushing program to track which hydrants were actuated for flushing and to give the crew members a live representation of where they had flushed and where they are in relation to one another. At the end of the day the employee time and resources were distributed amongst the hydrants which were actuated. Having a live feed of where the crew is flushing is also very helpful to the office staff when receiving phone call inquiries from residents about where flushing is taking place.



Category	Count	Cost
Total Tasks	740	
Progress	99 %	
Total Cost		\$11,120
Labor Cost		\$8,198
Equipment Cost		\$2,922
Material Cost		\$0
Other Cost		\$0

Map Filter: Search by address

Map Legend:

- 0 PROJECTED Tasks
- 1 PLANNED Tasks
- 0 IN PROGRESS Tasks
- 739 COMPLETED Tasks
- 0 CANCELED Tasks

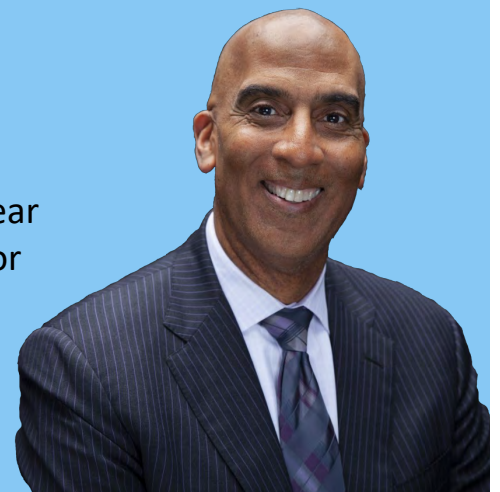
SMART

SOUTH METRO AREA  REGIONAL TRANSIT

MAY 2020 Report

Some of us are born to lead and some to follow, neither greater than the other. We are all called for a purpose. Each a cog in the wheel, keeping the wheel round and turning true. One's worth is never inextricably bound to their birthright. Our earthly value is deeply embedded in our individual talents and manifested in our willingness to share our prowess with others and for the greater good. I am convinced that life is made all the better because each of us plays our part to perfection. Without script or direction, we say our lines with conviction and a belief that we can make a difference. Though our days numbered and unprecedented times surround us like the thick London fog, I can still hear the words of the Greek author, Homer, saying, "Be still my heart; thou hast known worse than this."

Dwight Brashear
Transit Director



Transportation Options - Michelle Marston Program Coordinator

COVID-19 has transformed almost every aspect of daily life. Instead of commuting, many have spent the past months learning how to work virtually and stay connected.

With each passing week, we are getting closer to reopening. Many states have started to relax restrictions, and employers are hard at work thinking through their “return to workplace” plans.

The following excerpts taken from SCOOP, *What every employer needs to understand about the future of the American commute*.

When it comes to planning, employers tend to start by thinking about their space:

- What safety investments do I need to make?
- How do I redesign the workplace to minimize density?

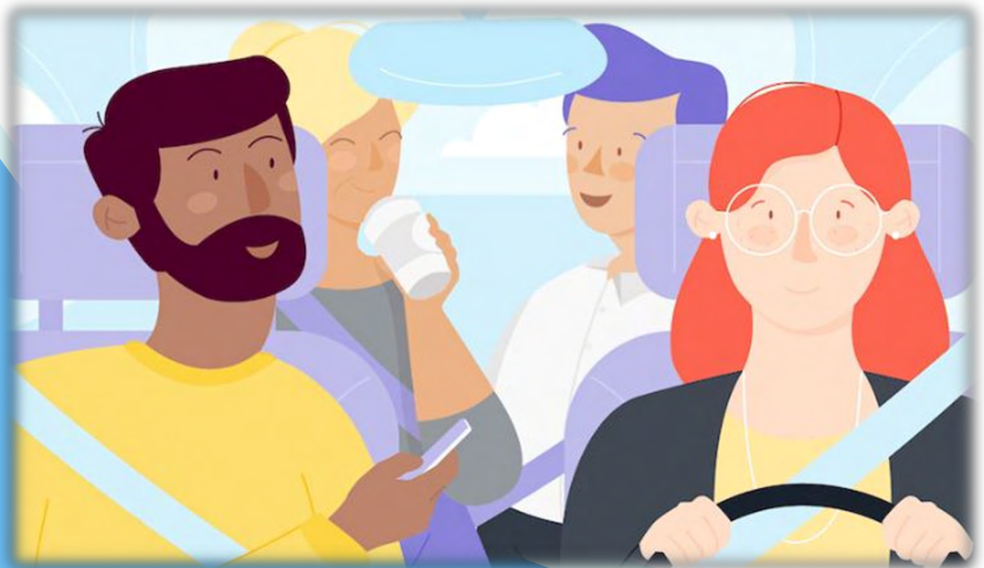
What percentage of my employees will I bring back, and when?

Employers can't assume all employees can drive alone. Plus, long term impact of a mass shift to driving alone on traffic, parking, and air quality is staggering.

Employers are going to have to invest in commute offerings to solve that challenge. Active mode programs (e.g. bikes, scooters, walking) and low density mode programs (e.g. carpool, vanpool) are going to become must-have offerings.

Over the next few months we aim to survey large employers to learn what they are thinking about their return to the workplace and how their employees are thinking about returning to the worksite. This survey should also help shed light on some of the motivating factors that help to drive commuter choices.

We want to learn about people's perception of safety of the different commute modes and begin encouraging carpool and vanpool options.



Fleet Services - Scott Simonton

Fleet Services Manager

In an effort to ensure compliance with the recently released Governor's transit reopening guidance, Fleet staff have installed hand sanitizer dispensers on the entire SMART fleet. Additionally, disposable face coverings are available to riders who may need them.

Signage, reminding passengers of the new guidelines, is currently in production. These signs will begin appearing on buses and bus shelters in the coming days.



Hand Sanitizer Stations aboard each bus

Grants and Programs - Elli Work

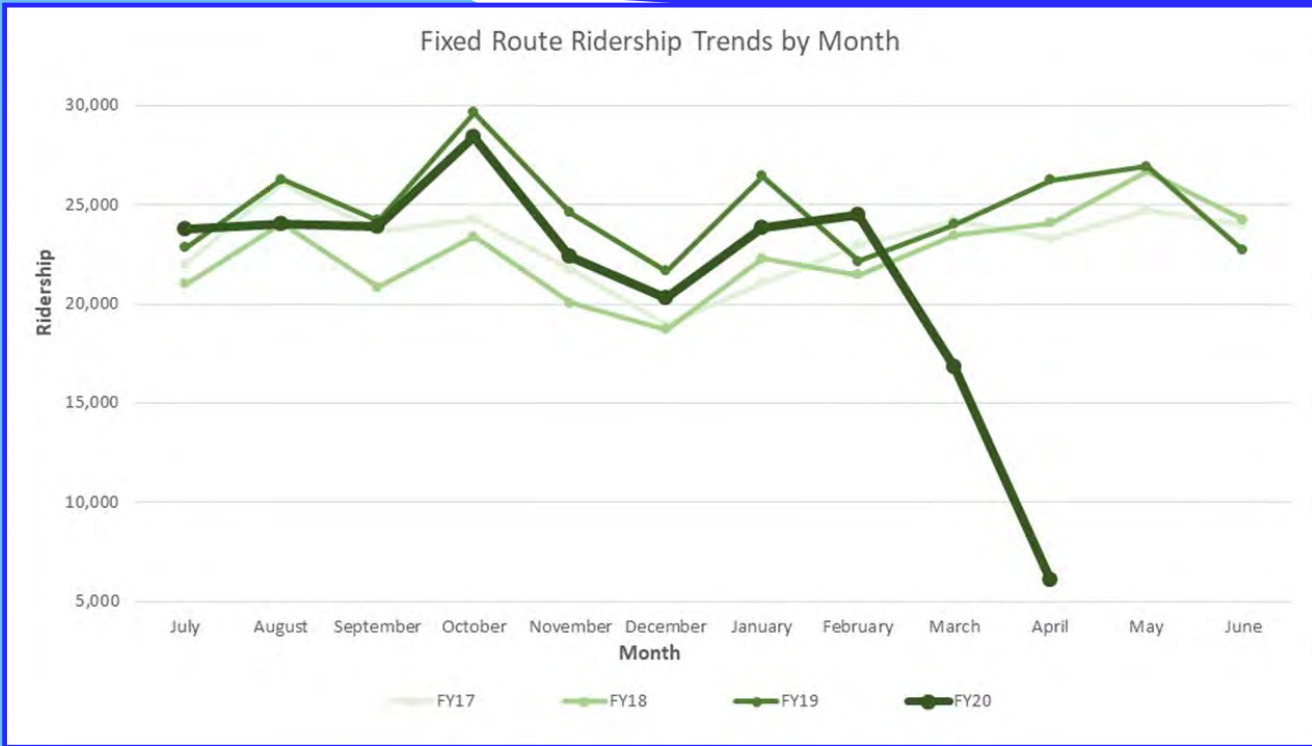
Grants and Programs Manager

With the slurry seal and striping done, the SMART parking lot expansion is complete. The contractor finished the project a month ahead of schedule. The expansion added ten parking spaces and a 12 x 12 cedar deck at the facility entrance. The FTA grant for \$67,600, matched at 20% for \$16,900, gave SMART a total project cost of \$84,500.



Expanded parking lot at SMART/FLEET

Operations - Eric Loomis Operations Manager



April fixed route and Dial-a-Ride ridership continued to drop relative to last month and last year. Like many geographic areas, COVID-19 negatively impacted people and businesses in Wilsonville. In Oregon, trips were limited to essential only per the Oregon Governor’s ‘stay home’ order beginning March 23 and SMART reduced frequency on all fixed routes beginning April 6.

