



City of Medford

Planning Department

Working with the community to shape a vibrant and exceptional city

CITY COUNCIL REPORT

for a Class-A legislative decision: Comprehensive Plan, Urban Growth Boundary Amendment

Project **UGBA Phase 2: ESA Boundary Amendment**

File no. CP-14-114

By Medford City Council

Date August 18, 2016

BACKGROUND

Proposal

Amend the Urban Growth Boundary (UGB) for the purpose of providing a twenty-year land supply based on the City's projected need for residential and employment land. The proposed changes include: expanding the Urban Growth Boundary, assigning General Land Use Plan (GLUP) map designations to the areas added to the UGB; amending the Medford Street Functional Classification Plan of the Transportation Element of the Comprehensive Plan to include the expansion areas; and amending some portions of the Urbanization and GLUP Elements of the Comprehensive Plan to accommodate the UGB amendment.

This Council Report and its exhibits constitute the amendment materials and the substantive basis for Ordinance no. 2016-99, which adopts the urban growth boundary amendment.

History

The City of Medford, as all cities in Oregon, continues to have a goal of providing land to accommodate its 20-year land need for housing and employment, as required under Oregon Revised Statute (ORS) 197.296. The City of Medford's current UGB was adopted in 1990 and was expected to last through 2010. As demonstrated in the City's Comprehensive Plan the City does not currently have a 20-year land supply. ORS 197.296 (6) recommends addressing the need by expanding the urban growth boundary, by increasing the developable capacity of the urban area, or by a combination of the two. Urban Growth Boundary Amendment (UGBA) Phase 1, the "Internal Study Area" (ISA) amendment, changed the General Land Use Plan (GLUP) designation of land in the existing urban area. This was done to increase the development capacity in the existing UGB in order to accommodate some of the City's projected need for residential and employment

land. The outcome of UGBA Phase 1 was the Selected Amendment Locations (SALs). The next phase, UGBA Phase 2 (External Study Area (ESA) Boundary Amendment), seeks to extend the City's UGB to make more land available for urban development.

The process of amending Medford's UGB began in the late 1990s with the start of the Regional Problem Solving (RPS) process. RPS was a joint effort between six municipalities, Jackson County, and the State of Oregon, to determine future land need for the region and to determine the most appropriate locations for future growth. From RPS the City adopted the Regional Plan Element of the Comprehensive Plan in 2012. The Regional Plan specifies where Medford's future growth will occur by identifying the urban reserve. The urban reserve is meant to provide sufficient land for a doubling of the city's population.

In order to determine the land need for the next twenty years, the City relies on the Buildable Lands Inventory (adopted in February 2008), the Population Element (adopted November 2007), the Economic Element (adopted December 2008), and the Housing Element (adopted December 2010) of the Comprehensive Plan. The Buildable Lands Inventory determined the amount of land available within the existing UGB. This total supply of land was adjusted to account for the effect of UGBA Phase 1. The Population Element was taken along with the Housing and Economic Elements to determine the total land demand for the 20-year period. The demand was then subtracted from the supply to determine the total land deficit by individual land type over the 20-year period. The UGB must be expanded by this total deficit amount in order to meet the land need for the 20-year period.

The entire urban reserve area was considered initially as part of the boundary expansion process. The Planning Department used a coarse filter, considering proximity and parcelization, to narrow the focus for further analysis from the available 50-year supply. The properties that passed through the coarse filter became known as the External Study Areas (ESAs). Data were collected for serviceability for transportation, water and sewer for the ESAs. The scores from each of the five factors (proximity, parcelization, transportation, water, and sewer) were used to guide the Planning Department's recommendation concerning the location of the UGB amendment. The Planning Department selected areas from the ESAs to fill the land need by type and in total for the 20-year period.

During the public hearings process before the Planning Commission a number of challenges to the City's adopted land need figures were raised. Based on these challenges, the Planning Commission decided it was prudent to remove approximately 153 acres from the City's land need. The Commission directed staff to present alternatives for where staff's recommendation could be altered to reflect the new land need. Staff prepared three alternative recommendations for consideration.

The Planning Commission also used the public hearings process to more fully develop findings for Goal 14 locational factor 3, which requires the City to consider the comparative environmental, social, economic, and energy (ESEE) consequences of different boundary location alternatives. Based on these findings, and the revised land need figures, the Commission chose to alter staff's recommendation by removing the land recommended in staff's "Alternative 1" and most of the land recommended in staff's "Alternative 2". The Commission also chose to add approximately 180 gross acres south of Cherry Lane, north of Barnett Road, and east of the current UGB, to the recommendation.

The Council received testimony that convinced it to reverse the Planning Commission's recommendation. After reviewing four restoration options at a February 25, 2016 study session and at its regular meeting on March 17, the Council selected the option presented by CSA Planning.

In addition to expanding the urban growth boundary and assigning GLUP map designations to the areas added to the UGB, the City proposes to amend the Street Functional Classification Plan of the Transportation Element of the Comprehensive Plan to include the expansion areas and portions of the Urbanization and GLUP Elements of the Comprehensive Plan to accommodate the UGB amendment. The recommended changes are shown in Exhibit A.

MAP AMENDMENT SUMMARY

		Number of Acres
Total Expansion Proposal		4,046
Developed or Unbuildable Land		511
Prescott Park and Chrissy Park		1,877
Land for Future Development (Residential + Employment)		1,658
Residential Land Amount		1,039
Low-Density Residential	UR	891
Medium-Density Residential	UM	27
High-Density Residential	UH	121
Employment Land Amount		618
Service Commercial	SC	220
Commercial	CM	300
General Industrial	GI	92
Heavy Industrial	HI	6

Related projects

Project UGBA Phase 1: ISA GLUP Amendment
File no. CP-13-032

This project was phase 1 of the UGB amendment process. UGBA Phase 1 changed the GLUP designations of over 500 acres of land within the existing UGB in order to meet a greater amount of the City's identified land need within the existing boundary.

Authority

This action is a Class "A" legislative Comprehensive Plan Amendment. The Planning Commission is authorized to recommend, and the City Council to approve, amendments to the Comprehensive Plan under Medford Municipal Code, sections 10.102, 10.110, 10.111, 10.122, 10.164, and 10.180.

Review Criteria

Medford Municipal Code §10.184 (1) refers to the Urbanization Element of the Comprehensive Plan for urban growth boundary amendments. This urban growth boundary amendment consists of two parts: the map amendments and the text amendments. Since both portions are parts of the combined urban growth boundary amendment, the findings (Exhibit B) apply to both the map changes (boundary adjustment/GLUP map/Street Functional Classification Map) and the text amendments (Comprehensive Plan text).

ACTION

The Medford City Council adopts the urban growth boundary amendment contained in the attached exhibits, which include both the Comprehensive Plan map and text amendments and the findings and conclusions that support the Council decision.

EXHIBITS

- A **Proposed urban growth boundary (UGB) amendment**, comprising a map of the proposed boundary amendment and GLUP designations, a map of proposed changes to the Street System Functional Classification Plan, and proposed text changes to portions of the Urbanization and GLUP Elements, including the Urban Growth Management Agreement (UGMA) between Jackson County and the City
- B **Findings and conclusions**
- C **Map: Urban Growth Boundary Amendment** (24 in. x 36 in.)

CITY COUNCIL AGENDA: AUGUST 18, 2016

Exhibit A Amendments

Contents

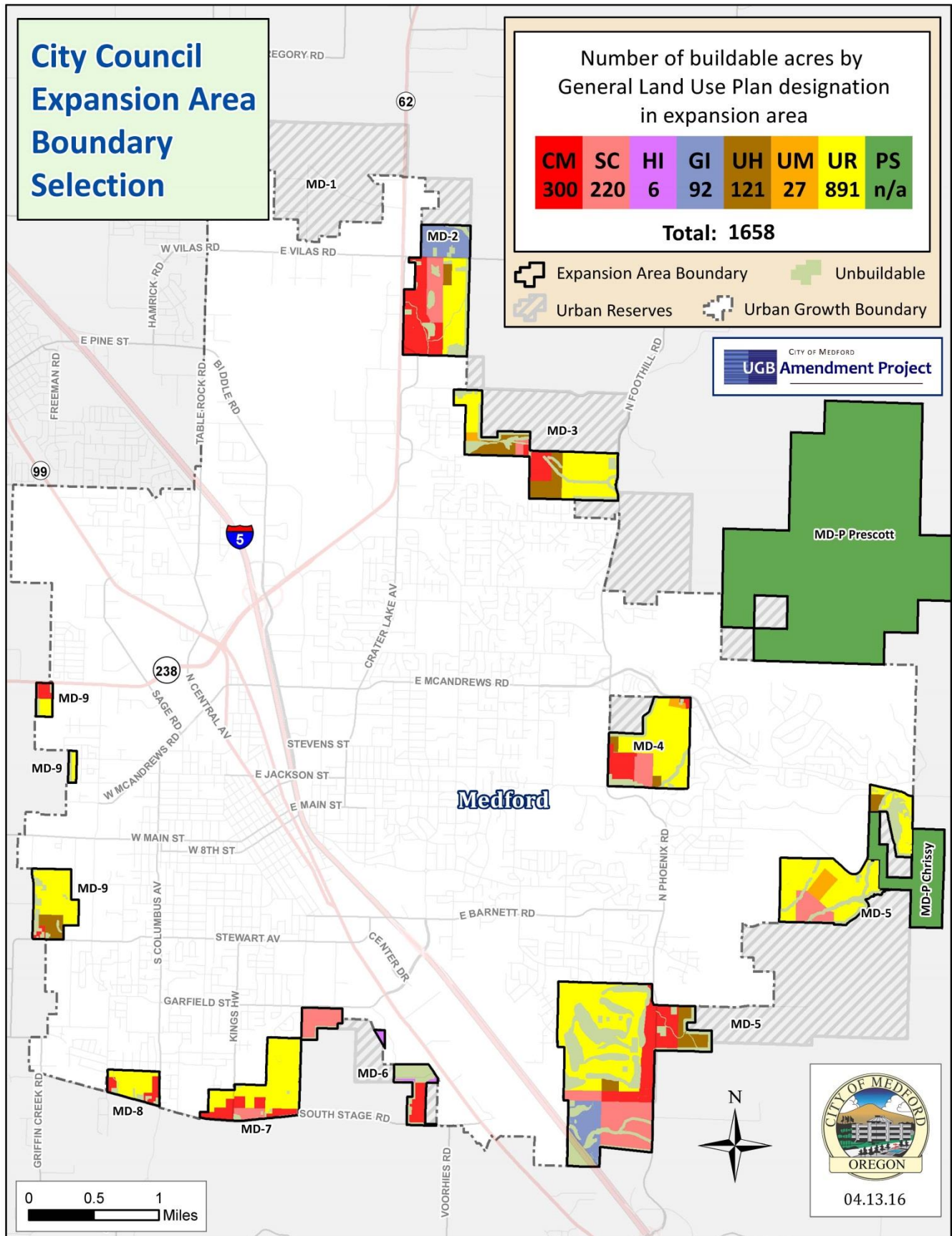
Map A-1: Urban Growth Boundary expansion

Map A-2: Street System, Functional Classification Plan

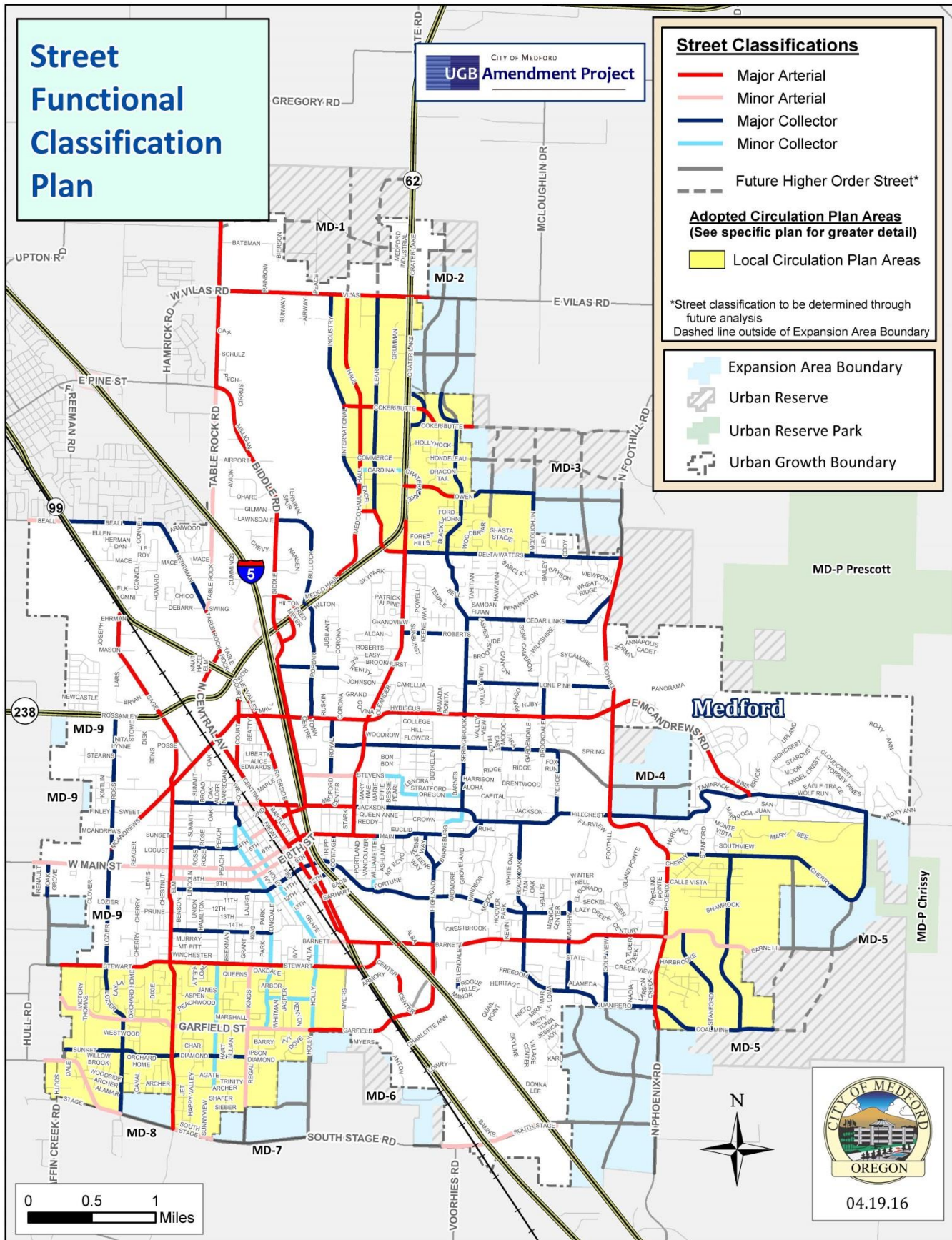
Text: Urbanization Element of the Comprehensive Plan

Text: General Land Use Plan

MAP A-1



MAP A-2



PROPOSED TEXT CHANGES

The following text sections will be changed through the proposed UGB amendment. Proposed additions shown in underlined blue and proposed deletions shown ~~struck through red~~.

URBANIZATION ELEMENT

* * *

1. URBAN GROWTH BOUNDARY

The Medford Urban Growth Boundary (UGB) includes land within the city and selected land surrounding the city that is committed to/planned for future city growth, the development of which is likely to require the extension of urban services. Land around the city within the UGB is called the unincorporated urban~~izable~~ area in this element. The Medford UGB was last amended in ~~1990~~2016 through a cooperative process between the City of Medford and Jackson County. It is officially delineated on the Jackson County and City of Medford Comprehensive Plan and zoning maps.

The Medford UGB was established to comply with the statutory requirement for urban growth boundaries around urbanized areas to identify and separate ~~urbanizable land~~urban area from rural land. Land within the boundary is referred to as the "urban area" in accordance with OAR 660-024-0010.

* * *

2. ANNEXATION

The transfer of ~~urbanizable land~~urban area under county jurisdiction to city jurisdiction is called annexation. Chapter 222 of the Oregon Revised Statutes governs annexation in Oregon. According to state law, land may be annexed to a city only if it is within the urban growth boundary, and is contiguous to the city limits. Generally, a majority of the registered voters and/or property owners within the area to be annexed must agree to the annexation, except in cases where the area is surrounded by land already under city jurisdiction.

* * *

2.1 Annexation Policies

The following are the policies of the City of Medford with respect to annexation:

* * *

2.1.7. Annexation of Property Added to the Urban Growth Boundary from the Urban Reserve

The City Council must find that the following conditions are met in order to approve an annexation of land that was added to the urban area from the Urban Reserve:

1. A revised Transportation System Plan (TSP), which includes the area to be annexed, has been adopted by the City.
2. A Local Wetlands Inventory (LWI), which includes the area to be annexed, has been adopted by the City.
3. For the area to be annexed, all Goal 5 resources, including riparian corridors, historic structures/properties, deer and elk habitat, wetlands, and scenic views have been identified and protected in accordance with Goal 5. In particular, the properties north of Chrissy Park and south of Hillcrest Road will comply with the mitigation process outlined by Oregon Department of Fish and Wildlife: [derived from Council Exhibit GGG]
 - a. A mitigation site shall be proposed by the private property owner and presented to ODFW for evaluation. The site proposed shall be approximately 60 acres. The identified site shall be located within the existing Big Game Winter Range Habitat in either the Lake Creek or Grizzly habitat units. Upon request of the property owner, ODFW will provide guidance to help identify potential mitigation site characteristics desired by the Department.
 - b. ODFW will complete the evaluation within 45 days of receipt of a letter requesting a mitigation site evaluation. ODFW will conduct a site visit of the proposed mitigation site. ODFW will provide a letter to the property owner that determines the suitability of the proposed site to meet the mitigation requirements in this condition. The letter shall also detail the habitat restoration efforts that will be required for the site.
 - c. If the property owner accepts the habitat restoration recommendations in 2 above then the restoration shall be completed and the site placed under permanent conservation easement (or other acceptable legal mechanism). Any conservation easement would need to be held by a third party with experience in managing these kinds of agreements, such as the Nature Conservancy or Southern Oregon Land Conservancy.
 - d. If the property owner does not accept the habitat restoration recommendations, the property owner may propose an alternative site or may propose alternative restoration measures in an attempt to reach agreement on a habitat restoration plan.

- e. Upon completion of the agreed upon restoration for an approved mitigation site and evidence of the recorded conservation easement (or other adequate legal mechanism), ODFW will conduct another site visit. If mitigation is adequate, ODFW will provide the property owner a letter verifying the mitigation has been completed. ODFW will provide a copy of the letter to the Jackson County Development Services Department and the City of Medford Planning Department.
- 4. An urbanization plan has been submitted, and adopted into the Neighborhood Element, for the area to be annexed which demonstrates compliance with the Regional Plan by showing the following details:
 - a. Compliance with the minimum residential density required by Regional Plan Element item 4.1.5. The urbanization plan must demonstrate how the planned residential development will meet the minimum density requirement of 6.6 units per gross acre assuming all areas within the development will build out to the minimum allowed densities. The following are acceptable methods for meeting the density standard:
 - i. Committing areas to higher density zones within a General Land Use Plan (GLUP) designation. For example, an area within the UR GLUP designation could be designated as SFR-10 (Single Family Residential – 10 units per acre) which would insure a minimum density of 6 units per acre; and/or
 - ii. Requesting residential GLUP map changes—from a lower density designation to a higher-density designation—as part of the master plan approval process. This will allow for additional areas for medium-density and high-density development within the areas added to the UGB. Although this process may cause slight deviation from the Housing Element it is necessary to ensure success in meeting the Regional Plan obligations.
 - b. Compliance with the requirements of Regional Plan Element item 4.1.6. for mixed-use/pedestrian-friendly development.
 - c. Compliance with the land use distribution requirements of Regional Plan Element item 4.1.8.(b).
 - d. Coordination with applicable irrigation district(s).
- 5. The Centennial golf course must receive an open space assessment from Jackson County for approximately 120 acres of land prior to the annexation of any of the 417 acres that make up the following tax lots:

<u>38-1W-04-100</u>	<u>37-1W-33-700</u>
<u>38-1W-04-101</u>	<u>37-1W-33-801</u>

[37-1W-33-900](#)
[37-1W-33-1000](#)
[37-1W-33-1100](#)

[37-1W-33-1200](#)
[37-1W-33CA-2000](#)
[37-1W-33CD-4700](#)

6. [To substantiate the rationales for including properties that were included at least in part for environmental, social, economic, energy \(ESEE\) reasons even if they received lower facility adequacy scores, or if they were included for other ESEE reasons, the following commitments offered by land owners during testimony will be binding obligations on the properties to substantiate the rationales for inclusion:](#)
 - a. [MD-2 shall include an obligation to reserve land for a school be made to extend for a period of 20 years following final approval of the amendment.](#)
 - b. [MD-5 shall provide donation of land for trails per the approved master plan, with the commitment to construct trails that are built concurrent with private development.](#)
 - c. [MD-5 East shall provide easements for utilities to allow for the development of adjacent lands currently within the urban growth boundary without ability to provide service in accordance with current municipal code.](#)
 - d. [MD-5 East, in the area commonly referred to as the "Hansen Property," shall provide a commitment to improving the existing Cherry Lane adjacent and along the property frontage by direct construction, local improvement district, system development surcharge, or other method as determined as acceptable by the City.](#)
 - e. [MD-5 West shall provide a deed restriction for open space areas.](#)

* * *

APPENDIX 1—URBAN GROWTH MANAGEMENT AGREEMENT

This agreement was mutually adopted ~~in 1993~~ by Jackson County (~~Ord. no. 93-31~~) and the City Medford (~~Ord. no. 7183 (1992); minor text correction via Ord. no. 7502 (1993)~~). The following policies guide the administration of the Medford Urban Growth Boundary:

1. An Urban Growth Boundary adopted herein, or hereinafter amended, for the Medford area will establish the limits of urban growth to the year ~~2010~~[2029](#).
 - a. Annexation to the City of Medford shall occur only within the ~~officially adopted UGB~~[urban area](#).

- b. Specific annexation decisions shall be governed by the official annexation policies of the City of Medford. The city shall provide an opportunity for Jackson County to respond to pending requests for annexation.

2. In accordance with the "Agreement Between the City of Medford, Oregon, and Jackson County, Oregon, for the Joint Management of the Medford Urban Reserve" (URMA) and as a requirement for the approval of the urban growth boundary amendment, the parties agree that the City Council will request County surrender of jurisdiction of several County Roads as listed below upon annexation. The City Council will make the request for County surrender of jurisdiction in accordance with ORS 373.270(6)(a) before the County will approve the urban growth boundary amendment. Following annexation by the City (which in many cases will be years later), County will surrender jurisdiction in accordance with ORS 373.270(6)(b).

The City Council will request surrender of the following nexus roads, as defined in the URMA, upon annexation of any portion of the identified urban reserve subarea:

MD-2 East Vilas Road, from Crater Lake Highway to 570 feet east of Crater Lake Highway.

MD-3 North Foothill Road, from East McAndrews Road to 405 feet north of Delta Waters Road.

MD-4 North Foothill Road, from Hillcrest Road to East McAndrews Road.

The City Council will request surrender of the following roads within the UGB expansion area upon annexation of the road. City shall not annex property fronting any of these roads without also annexing the full road width.

MD-2 East Vilas Road, from 570 feet east of Crater Lake Highway to 2,540 feet east of Crater Lake Highway.

MD-3 North Foothill Road, from 405 feet to 2,875 feet north of Delta Waters Road.

MD-5 North Phoenix Road, from Coal Mine Road to 2,780 feet north of Grove Way (southern boundary of MD-5).

MD-6 South Stage Road, from 1,830 feet to 3,015 feet west of Highway 99.

MD-7 South Stage Road, from 2,735 feet east of Kings Highway to 1,335 feet west of Kings Highway.

MD-7 Kings Highway, from 1,470 feet south of Agate Street to South Stage Road.

MD-8 South Stage Road, from Dark Hollow Road to Orchard Home Drive.

MD-8 Orchard Home Drive, from 140 feet north of Alamar Street to South Stage Road.

MD-9 Oak Grove Road, from 1,320 feet south of West Main Street to Stewart Avenue.

MD-9 Stewart Avenue, from 562 feet west of Woodlake Avenue to Oak Grove Road.

The City Council shall request surrender of jurisdiction of the roads identified above regardless of the design standard used to construct the roads and regardless of when and how the roads became County Roads. Transfers shall occur without compensation and the City shall not impose other conditions that might otherwise be allowed under ORS 373.270(6). County shall ensure the pavement condition of a transferred road is in 'good or better' condition at the time of the transfer as determined by County's Pavement Management Grading System.

When new County Roads are constructed within City's UGB or UR, County shall adhere to City's structural road section specifications. When existing County Roads within City's UGB or UR are widened, County shall adhere to City's structural road section specifications for the widened portion of the County Road. The structural section of the existing road width shall be as specified by the County Engineer.

If County proposes to construct new County roads within the City UGB, County will not begin construction until City Council has requested surrender of jurisdiction of the new roads upon annexation.

32. The City of Medford General Land Use Plan (GLUP) Map supersedes the County Comprehensive Plan map within the urban area. ~~and City of Medford~~ zoning designations for unincorporated ~~urbanizable land~~ urban area, and all other city development and building safety standards, shall apply only after annexation to the city; or through a contract of annexation between the city, Jackson County, and other involved parties; or after proclamation of an annexation having a delayed effective date pursuant to ORS 222.180 (2).

~~a. Urban development shall be encouraged to occur on undeveloped and underdeveloped land within city limits prior to the annexation and conversion of other land within the UGB.~~

34. Except in cases where a contract for annexation has been executed, or after proclamation of an annexation having a delayed effective date pursuant to ORS 222.180 (2), Jackson County shall retain jurisdiction over land use decisions with-

- in the unincorporated ~~urbanizable~~urban area, and such decisions shall conform to these adopted policies:
- a. Prior to annexation, no land divisions shall be approved by the county which create lots of less than ~~forty (40)~~ acres in size.
 - b. Prior to annexation, no property may be rezoned. This restriction advances the purposes and policies of the Regional Plan to make more efficient use of urbanizable land.
 - b. Recognizing that unincorporated areas within the UGB could ultimately become part of Medford, the city's recommendations will be given due consideration. It is the intent of the county to administer mutually adopted city/county policies in the unincorporated ~~urbanizable~~urban area until the area is annexed to the city.
 - c. The city will be requested to respond to pending applications for all land use actions in the unincorporated ~~urbanizable~~urban area. If no response is received within 14 days, the county may assume that the city has no objections to the request.
 - d. The county will be requested to respond to pending applications for all land use actions within the incorporated area that may affect land under county jurisdiction. If no response is received within 14 days, the city may assume that the county has no objections to the request.
 - e. If the city and county have mutually approved, and the city has adopted, conversion plan regulations for the orderly conversion of property from county to city jurisdiction, the county will require that applications for subdivisions, partitions, or other land divisions within the UGB be consistent with the city's Comprehensive Plan. Once developed, the mutually agreed upon conversion plan shall be the paramount document, until incorporation occurs. A conversion plan is any plan that is an urbanization plan, a special area plan, a circulation plan, or similar plan.
- ~~45.~~ Any land use actions within the unincorporated ~~urbanizable~~urban area shall conform to urban standards and public improvement requirements as contained in the city and county land development codes, except that in the case of a conflict between the two, ~~the more restrictive~~ City standards shall apply.
- ~~56.~~ Within the unincorporated ~~urbanizable~~urban area, execution and recording of an "irrevocable consent to annex" to the City, pursuant to ORS 222.115, shall be required for:
- a. Single-family residential permits

- b. ~~Sanitary sewer and water~~ Water hook-up permits⁺
 - c. All land use actions subject to county Site Plan Review
- ~~67.~~ 67. The city, county and affected agencies shall coordinate the expansion and development of all urban facilities and services within the urbanizable area.
- a. Urban facilities and services shall be planned in a manner which limits duplication to provide greater efficiency and economy of operation.
 - b. A proposed single urban facility or service extension within the unincorporated urbanizable area must be coordinated with the planned future development of all other urban facilities and services appropriate to that area prior to approval, and shall be provided at levels necessary for expected uses as designated on the Medford *Comprehensive Plan*.
 - c. The city shall be responsible for adopting and maintaining a public facilities plan for the city and unincorporated urbanizable area pursuant to OAR 660-11.
 - d. When development occurs within an unincorporated urbanizable area subject to a contract for annexation, or after proclamation of an annexation having a delayed effective date pursuant to ORS 222.180 (2), any or all city services may be extended to these areas. All associated fees and charges which are applicable within the city shall be applicable to these areas, and shall be paid to the city pursuant to city regulations.
- ~~78.~~ 78. Provision of sewer and water services may only occur beyond the UGB after approval by the provider agency and Jackson County, and when a danger to public health as defined by ORS 431.705 (5) exists. The services thus authorized shall serve only the area in which the danger exists, and shall provide a level of service consistent with the Jackson County *Comprehensive Plan* designation.
- ~~89.~~ 89. All county road construction and reconstruction resulting from new development, redevelopment, or land divisions in the urbanizable area shall be built to urban standards, except that the term reconstruction does not include normal road maintenance by the county.
- ~~910.~~ 910. Long-range transportation and air quality planning for the urbanizable area shall be a joint city/county process coordinated with all affected agencies.

⁺ ~~This policy, with reference to sewer hook-ups provided by Bear Creek Valley Sanitary Authority (BCVSA), has been disallowed by the Oregon Court of Appeals.~~

~~10~~11. Land within the urbanizable area which currently supports a farm use, as defined by ORS 215.203, shall be encouraged, through zoning and appropriate tax incentives, to remain in that use for as long as is economically feasible for the property owner.

- a. Economically feasible, as used in this policy, is interpreted to mean feasible from the standpoint of the property owner. Implementation of this policy will be done on a voluntary basis. Exclusive Farm Use (EFU) zoning may be applied to qualifying land by the county, with the understanding that such land is considered available over a period of time for urban uses.
- b. This policy applies only to areas in the UGB identified by the city or county Comprehensive Plans as agricultural land, and shall not be used as a standard to review other land use applications within the urbanizable area.
- c. This policy is not intended to preclude the use of EFU land for essential public facilities and services to serve the urban and urbanizable areas.

~~11~~12. Proposed land use changes immediately inside the UGB shall be considered in light of their impact on, and compatibility with, existing agricultural and other rural uses outside the UGB. To the extent that it is consistent with state land use law, proposed land use changes outside the UGB shall be considered in light of their impact on, and compatibility with, existing urban uses within the UGB.

~~12~~13. The city and county acknowledge the importance of permanently protecting agricultural land outside the UGB zoned EFU, and acknowledge that both jurisdictions maintain, and will continue to maintain, policies regarding the buffering of said lands, a position reinforced by the Regional Plan, which developed new buffering standards for cities to employ. ~~Urban development will be allowed to occur on land adjacent to land zoned EFU when the controlling jurisdiction determines that such development will be compatible with the adjacent farm use. Buffering shall occur on the urbanizable land adjacent to the UGB. The amount and type of buffering required will be considered in light of the urban growth and development policies of the city, and circumstances particular to the agricultural land. The controlling jurisdiction will request and give standing to the non-controlling jurisdiction for recommendations concerning buffering of urban development proposals adjacent to lands zoned EFU. Buffering options may include:~~

- ~~a. Physical separation through special setbacks for new urban structures adjacent to the UGB;~~

- ~~b. Acquisition by public agencies;~~
- ~~c. Lower densities at the periphery of the UGB than those allowed elsewhere in the city;~~
- ~~d. Strategic location of roads, golf courses, or other visible public or semi-public open spaces;~~
- ~~e. Use of vegetative screens, earthen berms, and fences of sufficient height and substance to help reduce the trespass of people, animals, and vehicles;~~
- ~~f. Orientation of structures and fencing relative to usable exterior space, such as patios, rear yards, and courts, so that the potential impacts from spray drift, dust, odors, and noise intrusion are minimized;~~
- ~~g. Design and construction of all habitable buildings, including window and door locations, so that the potential impacts of spray drift, dust, odors, and noise intrusion are minimized;~~

~~In addition, a deed declaration recognizing common, customary, and accepted farming practices shall be required for all development occurring within 300 feet of EFU-zoned land.~~

- ~~13~~14. All UGB amendments shall include adjacent street and other transportation rights-of-way.

- ~~14. An Area of Mutual Planning Concern may be delineated on the county Comprehensive Plan and Zoning maps along with the UGB. This is an area within which Medford and Jackson County have mutual concern over the land use planning decisions that may occur. The area may be significant in terms of its agricultural, scenic, or open space characteristics, or may be designated as an urban reserve to facilitate long range, inter-jurisdictional planning for future urbanization. The area may also provide an important buffer between Medford and other urban areas. The Area of Mutual Planning Concern is not subject to annexation, and is an area in which the county will coordinate all land use planning and activity with Medford.~~

GENERAL LAND USE PLAN (GLUP) ELEMENT

* * *

GLUP MAP DESIGNATIONS

The GLUP Map has ~~13~~¹² different land use designations that are applied to all land within the Urban Growth Boundary (UGB). The GLUP map also identifies the Urban Reserve by the nine subareas, which will not have GLUP designations applied to them until they are included in the UGB. These designations are defined as listed below. Permitted land uses, as well as the development standards associated with each zoning district noted, are listed in Chapter 10, Article III of the Municipal Code ~~Land Development Code~~. The City's SFR-00 (Single-Family Residential – one dwelling unit per existing lot) zone is permitted in all GLUP Map designations because it is considered a holding zone for parcels that are being converted from County to City zoning. These parcels are not eligible for development to urban density or intensity until facility adequacy has been determined through the zone change process. It is the City's intent to have these parcels converted to zoning that is consistent with the following GLUP Map designations as soon as a property owner can show that urban facilities are adequate or will be made adequate to serve the uses permitted by the proposed urban zoning.

13. *Urban Growth Boundary* The City of Medford and Jackson County have established an Urban Growth Boundary (UGB), which delineates Medford's urban ~~and urbanizable~~ areas. Following the ~~1990~~²⁰¹⁶ UGB amendment ~~there was a total of~~ the urban area is 17,889 nearly 22,000 acres (~~27.95~~^{34.27} square miles) ~~within the UGB including that land within the City in extent~~. The UGB is site specific. Since the GLUP Map does not indicate lot lines, the ~~UGB boundary~~ is also specified on the City of Medford Zoning Map, a map having lot lines, so that the location of specific parcels inside or outside of the ~~UGB boundary~~ can be determined.
14. *Urban Reserve* The Urban Reserve was created through the Regional Problem Solving (RPS) process and adopted into the Comprehensive Plan in the Regional Plan Element in 2012. The method of establishing an urban reserve is defined in state law (see ORS 195.137–145). The urban reserve is the first priority supply of land when the City considers expanding its UGB. The urban reserve is meant to provide a 50-year land supply for the City.

Exhibit B

Findings

Authority: This action is a Class “A” legislative Comprehensive Plan Amendment. The Planning Commission is authorized to recommend, and the City Council to approve, amendments to the Comprehensive Plan under Medford Municipal Code, sections 10.102, 10.110, 10.111, 10.122, 10.164, and 10.180.

Review Criteria: Medford Municipal Code (MMC) §10.184(1) refers to the Urbanization Element of the Comprehensive Plan for Urban Growth Boundary Amendments. This Urban Growth Boundary Amendment consists of two parts: the map amendments and the text amendments. Since both portions are parts of the combined Urban Growth Boundary Amendment the following findings will apply to both the map changes (boundary adjustment/GLUP map/Street Functional Classification Map) and the text amendments (Comprehensive Plan text). Except as otherwise provided, this Exhibit and its appendices together constitute the findings and conclusions of the City Council.

OVERALL FINDINGS

The Council finds that, in order to meet the City’s 20-year land needs for housing, employment, and other urban uses, the City’s Urban Growth Boundary (UGB) should be expanded by 1,669 acres in the locations depicted in Exhibit A, Map A-1, and in Exhibit C. In reaching this conclusion, the Council finds that the City has correctly applied state law in determining its existing land supply and projected land need for the 20-year planning period. Further, the Council finds that the City has correctly evaluated alternative boundary locations and has properly prioritized lands for inclusion in the UGB. The Council adopts the following findings and conclusions explaining how the City’s review process and UGB expansion area comply with applicable local and state approval criteria.

APPROVAL CRITERIA COMPLIANCE

Approval criteria for Urban Growth Boundary Amendments found in Section 1.2.3 of the Urbanization Element of the Comprehensive Plan

1.2.3 Approval Criteria

The City will base its decision for both major and minor amendments on:

- a. *The standards and criteria in Goal 14¹, OAR 660, Division 24, and other applicable State Goals, Statutes, and Rules.*
- b. *Compliance with Medford Comprehensive Plan policies and development code procedures.*
- c. *Compliance with Jackson County’s development ordinance standards for urban growth boundary amendment. Many of the findings made to satisfy subparagraph (a), preceding, will also satisfy this criterion.*
- d. *Consistency with pertinent terms and requirements of the current Urban Growth Management Agreement between the City and Jackson County.*

* * * * *

Urban Growth Boundary amendment approval criteria from Urbanization Element, Section 1.2.3

Criterion a. The standards and criteria in Goal 14, OAR 660, Division 24, and other applicable State Goals, Statutes, and Rules.

Goal 14 – Land Need

Establishment and change of urban growth boundaries shall be based on the following:

1. *Demonstrated need to accommodate long-range urban population, consistent with a 20-year population forecast coordinated with affected local governments; and*
2. *Demonstrated need for housing, employment opportunities, livability or uses such as public facilities, streets and roads, schools, parks or open space, or any combination of the need categories in this subsection (2).*

In determining need, a local government may specify characteristics, such as parcel size, topography or proximity, necessary for land to be suitable for an identified need.

Prior to expanding an urban growth boundary, local governments shall demonstrate that land needs cannot reasonably be accommodated on land already inside the urban growth boundary.

Findings

The process of determining Medford’s land need for the next 20 years started with the adoption of the Population Element in 2007. This study looked at the forecasted popula-

¹ Goal 14 identifies two components for amending a UGB: Land Need and Boundary Location. It also provides details on what should be considered for each of the two components. Goal 14 is divided into its two parts in the Findings below with the specific language from the goal provided in italics.

tion growth in Medford through 2040. Although a new process requires cities to utilize population forecasts prepared by Portland State University, the City commenced its UGB analysis before this process became effective.

The next step was the Buildable Lands Inventory (BLI), adopted in 2008, consistent with OAR 660-024-0050 and ORS 197.186 and 197.296. This study identified the number of acres, in total and by type, available for development within the City's current UGB. The BLI showed that there are approximately 2,592 gross residential acres² and approximately 1,078 gross employment acres³ available for development within Medford's UGB. See Appendix A for additional findings regarding land supply.

Also adopted in 2008 was the Economic Element, which considered the projected population growth, along with economic trends, to determine the overall need for employment land over the 20-year planning period. The study concluded that an additional 708 gross acres were needed to meet the demand for employment land. However, as shown in Appendix B, this does not properly account for the excess supply of industrial land available within the existing UGB. When properly calculated (see Appendix B) the need for employment land increases to 765 gross acres.

Next came the Housing Element, adopted in 2010, which considered the projected population growth, along with housing trends, to determine the overall need for residential land over the 20-year planning period. The study concluded that an additional 996 gross acres⁴ were needed to meet the demand for housing and public and semi-public uses.

The Housing Element also projected future needs for public and semi-public uses. OAR 660-024-0040 (10) allows for a "safe harbor" net-to-gross factor of 25% for streets and roads, parks and school facilities. Rather than use the safe harbor amount the Housing Element calculates the net-to-gross factor for streets based on observations of the existing residential areas in the city. According to page 57 of the Housing Element "...the forecast shows land need in net acres. Net acres is the amount of land needed for housing, not including public infrastructure (e.g. roads). Gross acres is the estimated amount of land needed for housing inclusive of public infrastructure. The net-to-gross factor allows for conversion between net acres to gross acres. The net-to-gross factor is highest (23%) for single-family detached dwellings, decreasing to 10% for multi-unit projects." Parks and schools were not considered in the net-to-gross factor, but rather, were included in the Other Residential Land Needs portion of the Housing Element, which concluded that 153 acres of park land and 20 acres of school land were needed in the UGB expansion area (see *Table 1.1*). The Other Residential Land Needs section of the Housing Element examines existing conditions for public and semi-public land to forecast future need for this land type.

² From Housing Element *Table 30*

³ From Economic Element *Figure 28*

⁴ From Housing Element *Table 41*

According to the Housing Element:

Lands needed for public operations and facilities include lands for city facilities, schools, substations, and other public facilities. Land needs were estimated using acres per 1,000 persons for all lands of these types. Lands needed for parks and open space estimates use a parkland standard of 4.3 acres per 1,000 persons based on the level of service standard established in the Medford Leisure Services Plan Update (2006). This update includes land needed for neighborhood and community parks, which usually locate in residential plan designations. It does not include land needed for natural open space and greenways, which may also be located in residential plan designations (Housing Element, page 62).

Table 1.1. Public and Semi-public Land Need (Housing Element Table 40)

Type of Use	Existing Acres	Acres per 1000 Persons	Assumed Need (ac/1000 Persons)	Estimated Need per 1000 Persons 2009–2034	Planned un-built supply in existing UGB
City	113	1.5	1.5	64	
City Parks	527	6.8	4.3	153	19
County	36	0.5	0.5	17	
State	47	0.6	0.6	22	
Federal	26	0.3	0.3	12	
Other public agency	43	0.6	0.6	20	
Schools	265	3.4	0.6	20	26
Church	159	2.1	2.1	73	
Fraternal	96	1.2	1.2	44	
Private Parks/Recreation					-43.7
Total	1,313	17.0	11.6	425	1.3
Net Needed for UGB					426

A letter submitted into the record by Greg Holmes of 1000 Friends of Oregon, dated March 3, 2015 (Appendix C, attached as background information only and is not considered a part of the findings), challenges some of the City's land need assumptions. Of the various charges of land excess in the letter, the City finds that unbuildable lands and the land need for rights-of-way, parks, and schools were correctly calculated for the reasons explained below and in Appendix B, "Land Need". 1000 Friends of Oregon also contended that the City erroneously double-counted 18 acres of private park land need and 135 acres of land for government uses, causing the City to overstate its projected land needs over the planning period by 153 acres.

In contrast, Hillcrest Corporation argues in a letter dated December 1, 2015, that the City previously identified the need for the 153 acres when it amended its Housing Element. Hillcrest contends that the Council is bound by the determination of need in its

Housing Element because it was adopted as a post-acknowledgement plan amendment in 2010 and is thus deemed acknowledged. In a February 10, 2016, letter, the Department of Land Conservation and Development argues that DLCD never accepted the Housing Element because it was incomplete and premature because it did not address the requirements of ORS 197.296(6), citing to *DLCD v. City of McMinnville*, 41 Or LUBA 2010 (2001).

The Council finds that the question is not whether the Council is bound by the Housing Element, but whether the Council is entitled to rely on the Housing Element and, as a policy matter, whether it should rely on the Housing Element.

The Council finds that it may rely on the Housing Element as adopted. As Hillcrest points out, LUBA rejected DLCD's argument in *McMinnville* that it should dismiss the case for lack of jurisdiction because the City of McMinnville's housing needs analysis indicated that the UGB needed to expand by more than 50 acres and therefore LCDC, not LUBA, has jurisdiction over such amendments under ORS 197.626. LUBA concluded that the City of McMinnville's enactment of its housing needs analysis did not trigger LCDC's jurisdiction because it did not expand the UGB and that it was a final land use decision subject to the Board's review. But LUBA remanded that decision based upon its determination that it did not comply with the requirement in 197.296(3) and (4) (now (6)). LUBA held that these provisions required the City to simultaneously proceed with measures to address the needs identified by the analysis. Had DLCD filed a timely appeal of the City of Medford's 2010 enactment of its housing needs analysis to LUBA based upon failure to comply with ORS 197.296(6), it might have been able to obtain a remand pursuant to the holding in the *McMinnville* case. It did not do so, and so the Housing Element is deemed to be acknowledged by operation of state law under ORS 197.625(1)(a) and the City Council is entitled to rely on it.

The Council notes that adoption of the Housing Element in advance of taking action to address the identified needs does not otherwise violate the Statewide Land Use Planning Goals or rules. LUBA addressed this issue in *GMK Developments, LLC v. City of Madras*, 57 Or LUBA 81 (2008). In conjunction with its designation of urban reserves, the City of Madras adopted the Madras Urbanization Report (MUR), which evaluated and determined its housing needs over twenty-and fifty-year time frames. The petitioners challenged that enactment, arguing the City's failure to simultaneously take action to amend its urban growth boundary to address the identified needs violated Goal 10 (Housing), Goal 14 (Urbanization), and ORS 197.307(3)(a). Petitioners cited the *McMinnville* case in support of their argument. LUBA rejected this argument, concluding that its decision in *McMinnville* turned solely on its reading of the requirements of ORS 197.296(3) and (4) (now (6)), which did not apply to the City of Madras because of its smaller population. LUBA held that the goals and statutes did not otherwise require Madras to take immediate action to address its identified needs and affirmed the City's enactment of the MUR. LUBA's decision was affirmed by the Court of Appeals in *GMK Developments v. City of Madras*, 225 Or App 1, 199 P3d 882 (2008).

The time for DLCD (or 1000 Friends) to challenge the enactment of or assumptions contained in the Housing Element was therefore in 2010. The Housing Element is now part of the City's Comprehensive Plan and the Council is entitled to rely on it. In addition, because the City is currently acting to address the needs identified in the Housing Element, any challenge that could have been made in 2010 that enactment of the Housing Element violated ORS 197.296(6) is now moot.

The question for the Council becomes whether, even if the City is legally entitled to rely on the Housing Element as adopted, the Council should revisit the projections in light of the arguments that were convincing to staff and the Planning Commission that the Housing Element miscalculated private park land and government land needs in the amount of 153 acres. On the balance, the Council concludes that it should not revisit or modify these assumptions.

First, the integrity of the process weighs in favor of relying on the Housing Element as enacted. As noted elsewhere in these findings, the Housing Element went through a significant public process prior to enactment, and both 1000 Friends of Oregon and DLCD actively participated in that process, including providing detailed comments on the proposed Housing Element. Since enactment, the Housing Element has formed the basis for all of the City's subsequent UGB amendment analysis. In fact, the Council's findings in support of adoption of the Housing Element expressly contemplated that the Housing Element analysis and projections would do so, by providing "a sufficient basis of facts to estimate the lands needed, pursuant to Statewide Planning Goal 2, upon which action must be taken under ORS 197.296" (Housing Element Findings, pp. 38-39). The population and need projections necessarily reflect a snapshot in time, and as the testimony illustrates, are subject to second guessing based upon new information. Five years from now, that information will change yet again. The Council finds that, rather than second-guess the adopted Housing Element only a few years after its adoption and before the projections within that document have matured, it is more prudent to wait and reconsider the Housing Element at the end of the planning period. For these reasons, the Council finds that it is important to respect the process and provide certainty by relying on the City's adopted Housing Element.

Second, the alleged excess 153 acres is a very small portion of the total identified land need of 1,669 acres. Given the uncertainties inherent in a twenty-year need projection noted above, the Council finds that inclusion of the 153 acres does not violate the statute even if its inclusion in the Housing Element could have been subject to challenge in 2010 (a point on which the Council makes no finding).

Third, the Council might agree that a more conservative approach would be warranted if the total acreage need was being utilized to justify inclusion of lower priority lands, particularly lower priority farm and forest lands. That is not the case here: All of the lands identified for inclusion in the UGB are in designated urban reserves. The City has previously made the policy decision that these lands will be urbanized and such lands are first priority for inclusion in the UGB under ORS 197.298. The City has extensively analyzed

all of the lands identified for inclusion and has proposed detailed findings explaining why the lands selected are appropriate under the Goal 14 factors, and make sense for urbanization over the next twenty years.

Fourth, the Council finds that 1000 Friends' objection concerns only one component of the Housing Element and fails to consider the element as a whole, which was based upon reasonable assumptions regarding projected land need. For example, the Housing Element assumed higher average net density for all housing types in the planning period compared to the previous planning period.

Additionally, the Council finds that the proposed expansion area map at Exhibit A, Map A-1, and in Exhibit C, correctly identifies 511 acres of "unbuildable" lands. As support for this conclusion, the Council relies upon City staff's Supplemental Findings memo no. 3 dated October 1, 2015, which identified the legal basis to classify the following lands as "unbuildable": slopes of 25 percent or greater, riparian corridors, developed land, wetlands, lands with an open space assessment, and land devoted to agricultural buffers; and calculated the total amount of such lands in the UGB expansion area. The Council also relies upon the Geographic Information System layers available on the City's mapping.

For these reasons, the Council concludes that the land need for housing and employment uses is set forth in Tables 1.3 and 1.4, below.

In addition to the standard urban reserve areas the Regional Plan Element identifies two large regional park areas, MD-P Prescott and MD-P Chrissy, which contain Prescott Park and Chrissy Park, respectively. These areas are City-owned wildland parks totaling 1,877 acres. Inclusion as urban reserve was intended to serve as a mechanism to eventually incorporate this City property into the City boundary to allow the City to have jurisdiction of the parks. The two MD-P areas were not considered areas for future urban growth because of their classification as parkland. There is no residential, commercial, or industrial development planned for the MD-P acres. They present a tremendous recreational and open space asset to the City and the region, in addition to creating a buffer between the city and rural lands to the north and east. However, due to their location along the eastern periphery of the city and very steep topography, these lands satisfy little of the localized open space needs throughout the city and do not meet land needs for traditional urban parkland.

Through the studies adopted into the respective elements of the Comprehensive Plan, the City of Medford demonstrated a deficit in the supply of land within its existing UGB, for all types of uses, over the next 20 years. ORS 197.296 (6) recommends addressing the need by expanding the urban growth boundary, by increasing the developable capacity of the urban area, or by a combination of the two. UGBA Phase 1 (ISA GLUP Amendment) sought to change the General Land Use Plan designation of land in the existing urban area for the purpose of increasing its development capacity in order to accommodate some of the City's projected need for residential and employment land. See

Appendix D for more information regarding UGBA Phase 1's effect on land supply. UGBA Phase 1 resulted in more efficient use within the UGB in the following ways:

- It took surplus industrial land (land in excess of the need for the next 20 years) and converted it to commercial land. This resulted in the accommodation of a larger portion of the employment need within the existing UGB;
- The conversion of industrial to commercial also helped to increase the likelihood of both commercial and industrial development over the next 20 years by placing these uses in more appropriate locations. There is strong development pressure for commercial uses on the industrial land nearer the center of the city, near major transportation routes. This pressure makes the land less likely to develop with industrial use. The swapping of land types places commercial designations on tracts of land nearer the center of the city while allowing the City to designate more land near the outside of the urban area, and still near major transportation routes, for industrial development;
- The City was able to shift some of the residential density called for in the Housing Element, and required by the Regional Plan, to the inside of the urban area. By shifting density inward the City is providing for a more efficient use of land and of public infrastructure;
- While UGBA Phase 1 resulted in a 58-acre conversion of land from residential to employment GLUP designations, the total residential land need only increased by 36 acres;
- The conversion of some residential land to employment land decreased the overall land need due to the fact that some of this land was not identified as meeting any portion of the future residential land need because it was classified as developed for residential. Because this land is expected to redevelop with commercial uses it is now being counted toward meeting a portion of the employment land need; and
- The shifting of density inward allows for a more efficient use of land within the city now, rather than relying on redevelopment to higher densities in the future. This also helps to provide opportunities for increased densities in the UGB expansion area because a larger percentage of the forecasted population over the next 20 years can be accommodated within the existing boundary. This could result in a slower expansion into the newly added areas, which would allow for policy changes in the future should the market shift toward higher density development. The density shift also helps to meet the obligations of the Regional Transportation Plan.

UGBA Phase 1 resulted in a decreased land need for the City. Before these intensification measures, a total of 1,761 gross acres were needed outside of the existing UGB. After UGBA Phase 1, a total of 1,669 gross acres are needed, a reduction of 92 acres.

In 2012 the City, together with five other cities in the valley, adopted a Regional Plan for accommodating a doubling of the region's population. Regional Plan Element 4.1.5 requires a minimum density of 6.6 units per gross acre for all newly annexed areas for the

years 2010 through 2035. The aggregate average density of the residential land need, determined by the Housing Element (see Appendix B, *Table 3.2*), was 6.9 units per gross acre (see *Table 1.2*. below). Some of this density was then shifted into the existing UGB through UGBA Phase 1. This density shift resulted in an increased need for UR (Urban Low-Density Residential) and a decreased need for UM (Urban Medium-Density Residential) and UH (Urban High-Density Residential) in the expanded UGB. While this density shift helped to accomplish a number of positive benefits it also makes meeting the minimum density requirement of the Regional Plan more difficult. With the revised ratios of residential land types in the UGB expansion area the average densities for each of the residential land types alone will not result in a density of 6.6 units per acre or above.

Table 1.2. Average Density from Housing Element (See Appendix B)

	Acres	Density	Total DU
UR	465	4.8	2,233
UM	39	12.8	498
UH	66	18.1	1,185
Total	570		3,916
Density			6.9 dwelling units/acre

The Housing Element (2010) provides an accurate representation of the City's housing need over the next 20 years. The Regional Plan (2012) imposes a density standard that is in excess of the density supported by the Housing Element now that the efficiency measures of UGBA Phase 1 are completed. In addition, the Regional Plan requires a density of 7.6 units per gross acre for all newly added areas for the years 2036 to 2050. In order to reconcile the two the City will require an urbanization plan to be submitted, showing compliance with the Regional Plan obligations for density and land use distribution, prior to annexation for any of the land added through this UGB amendment process. Acceptable methods for meeting the density standards will include:

- Committing areas to higher-density zones within a General Land Use Plan (GLUP) designation. For example, an area within the UR GLUP designation could be designated as SFR-10 (Single-Family Residential – 10 units per acre) which would ensure a minimum density of 6 units per acre. By establishing “pre-zoning” within the established GLUP designations the residential density for the area can be moved higher than the minimum, or even average, density that the GLUP could accomplish; and/or
- Requesting GLUP map changes as part of the urbanization plan approval process. This will allow for additional areas for medium-density and high-density development within the areas added to the UGB. This technique will allow for more flexibility in meeting the density obligations of the Regional Plan without imposing a housing mix that is not consistent with the Housing Element. This will allow for flexibility in housing types as the market shifts toward higher-density housing while also setting the stage for the future density standard of 7.6 units per gross

acre required by the Regional Plan. This approach will also help to address the affordable housing need identified in the Housing Element. By adding additional high-density housing throughout the UGB (in the existing UGB through the SALs and in the newly added areas by allowing for GLUP changes to higher density), the City is providing for more high-density housing, which is needed to provide more affordable housing within Medford, a need identified in the Housing Element but not subsequently addressed.

These required urbanization plans are expected to build on the conceptual plans required by the Regional Plan that also formed the basis of the GLUP designations for the areas added to the UGB.

Conclusions

The basis for the land need began with the 2007 population forecast, which provided the growth figures the housing and employment needs analyses relied on. A new forecast was released recently, but the City is permitted to rely upon its 2007 forecast and, because so much time, work, and money has been spent to reach this stage, it has chosen to do so in this matter.

UGBA Phase 1 (the SALs) converted surplus industrial land to commercial land which allowed for more of Medford's need for employment land to be accommodated within its existing UGB. The conversion also resulted in the increased likelihood of a larger amount of Medford's employment land need being met within the existing UGB by more appropriately locating both commercial and industrial land. While these adopted efficiency measures helped to address a portion of the City's employment land need, an additional 637 gross acres of employment land outside of the existing UGB are needed. The employment land portion of the proposed UGB expansion, shown in Table 1.3 below, will allow the City to meet its identified need for employment land.

Table 1.3. Employment Land Need in Gross Acres

Plan Designation	Need	Plan Description
SC	222	Service Commercial: office, services, medical
GI & HI	97	General & Heavy Industrial: manufacturing
CM	<u>318</u>	Commercial: retail, services
Total Employment	637	

The Housing Element provides for an adequate land supply at a realistic housing mix for the planning horizon. In addition to land for housing, the Element accounts for land needed for streets and other utilities, and for public and semi-public uses, which usually occur on residentially zoned properties. The residential density requirements of the Regional Plan were added to the Comprehensive Plan after the adoption of the Housing Element and the two do not agree. By requiring urbanization plans for all of the areas being added to the UGB prior to annexation, the City can reconcile the Housing Element with the Regional Plan and can insure that the residential density standards are being

met. The required urbanization plans must demonstrate compliance with the minimum density standards and with the land use distributions required by the Regional Plan.

Goal 10 requires that “plans shall encourage the availability of adequate numbers of needed housing units at price ranges and rent levels which are commensurate with the financial capabilities of Oregon households and allow for flexibility of housing location, type, and density.” By allowing for some residential areas to be up-GLUPed (from a low-density residential GLUP to a higher-density residential GLUP) the City is providing for more flexibility of housing types in the UGB expansion areas while also helping to increase the supply of higher-density housing, which is needed to meet the demand for low-income housing in the City.

The “Other Residential Land Needs” of the Housing Element identified a need for 153 gross acres of additional parkland for neighborhood and community parks outside of the existing UGB. The Regional Plan Element also includes two large wildland park areas that are owned by the City. These areas, Chrissy and Prescott parks, are intended to provide for both recreational and open space opportunities for the City and for the region. While both help to meet the recreational needs for the City these are two different land types (neighborhood and community park vs. regional/wildland park and open space) that provide two discreet types of uses for the City.

After adopting the efficiency measures from UGBA Phase 1 the City needs 1,032 gross acres of land outside of the existing UGB to meet its needs for residential and public and semi-public land. The public and semi-public land was allocated to the three residential land types based on the percentage of dwelling units needed for each type and will be removed in the same way to adjust for the revised land need. The residential land portion of the proposed UGB expansion, shown in table 1.4 below, will allow the City to meet its identified need for these land types.

Table 1.4. Residential Land Need in Gross Acres

Plan Designation	Need	Plan Description
UR	885	Low-density Residential, 4–10 units/acre
UM	27	Medium-density Residential, 10–15 units/acre
UH	120	High-density Residential, 15–30 units/acre
Total Residential	1,032	

* * * * *

Goal 14 – Boundary Location

The location of the urban growth boundary and changes to the boundary shall be determined by evaluating alternative boundary locations consistent with ORS 197.298 and with consideration of the following factors:

1. Efficient accommodation of identified land needs;

Findings

Per ORS 197.298, once a City has demonstrated a need to expand its UGB, the first priority of land for inclusion is land designated as urban reserve. No other type of lower-priority land should be considered for inclusion unless the land need exceeds the supply of land within the urban reserve. In this case, Medford's urban reserve provides for a roughly 50-year supply of land. The land the City has available to select from is all first-priority land. All of this land has been identified for future urbanization and the work of determining suitability was done in the creation of the urban reserve, consistent with ORS 195.137–145.

The City has an identified land need of 1,669 acres and an urban reserve of 4,488 acres (excluding the two wildland park areas) from which to choose. While the 4,488 acres includes both buildable and non-buildable acres, the total far exceeds the 1,669 buildable acres needed for the 20-year planning period. In order to determine where the City could most efficiently meet its land needs for the next 20 years a "coarse filter" was used. The coarse filter, which considered proximity and parcel size as indicators of efficiency for development, helped to refine the area of consideration prior to completing a capacity analysis (to determine the number of buildable acres) and comparing urban reserve areas on a more detailed level.

One of the best indicators for suitability for the first 20-year supply is proximity. Basic principles of urban planning dictate that growth will occur from the center out in order to avoid "leap-frog" development which leads to inefficient use of land and difficult and costly extensions of infrastructure. The results of the proximity analysis are shown on *Map 5.1* in Appendix E.

The next criterion used in the coarse filter portion of the analysis is parcelization. Staff mapped parcel size in order to determine the amount of parcelization in each of the urban reserve areas. The results of the parcel size analysis are shown on *Map 5.2* in Appendix E. The City is obligated to provide a 20-year supply of land for residential and economic development but is not allowed to offer anything more than a 20-year supply. Because of this obligation, and this constraint, it is imperative that the City select land that is available for development over the next 20 years. The development of larger tracts of land tends to have a higher return on investment than the development/redevelopment of smaller tracts of land. In addition, the land use structure in Oregon has created a premium on rural residential acreage near the city limits. Because "rural" living close to town is both desirable to many, and is getting harder to come by, people who own these properties have little incentive to develop the properties to ur-

ban density standards. Once urban development extends to, and encroaches upon, these smaller parcels, the land becomes more developable both because it makes greater economic sense (utilities more readily available, and higher land value/larger demand) and because the property loses its rural feel.

The results of the coarse filter are shown on *Map 6.1* in Appendix F. A brief discussion of why certain portions of the urban reserve were eliminated through the coarse filter process is provided below.

The middle portion of MD-1 and the southeast corner of MD-5 were eliminated from further consideration because they scored poorly on both proximity and parcelization. The remainder of MD-1, the north portion of MD-2, the northeast corner of MD-3, MD-3 east of Foothill Rd, and all of MD-6, MD-7, MD-8, and MD-9 had marginal composite scores for proximity and parcelization. With the exception of a portion of MD-6, the urban reserve areas on the west side of interstate 5 (MD-6, MD-7, MD-8, & MD-9) were retained for further consideration in order to maintain a balance of ESAs around the existing UGB. The balanced distribution around the existing UGB was considered important for a number of factors, including:

- Distribution around the UGB worked as an additional filter in the selection of parcels near existing development. Since urban development extends to, or near, the existing UGB in most places, selecting a group of parcels spread out around the UGB to the fullest extent possible places these parcels closer to existing urban development. Selecting parcels all within large groups (all of MD-5 for example) would have the effect of including parcels that are further away from existing development.
- The selection of land distributed around the entire UGB adds diversity to the supply of land. This adds choice in development type, price point, and so on.
- Distributing parcels around the existing UGB helps to spread the burden of providing services to new development. Placing all new development in a smaller number of areas would have the effect of overburdening the systems for water, sewer, transportation, etc. By providing for a larger geographic distribution for future development the City can allow for the increased demand on the existing systems to be distributed throughout the systems.

The east portion of MD-1 was retained for further consideration because of its proximity to the existing Highway 62 route and the future Highway 62 route. The west portion of MD-1, the northeast corner of MD-2, the northeast corner of MD-3, and MD-3 east of Foothill Rd were eliminated from consideration because they all have marginal composite scores for proximity and parcelization and they do not serve to improve the transportation system by providing connections for highways or higher-order streets.

Conclusions

The City only considered first-priority land (land within the urban reserve) for inclusion per ORS 197.298. Since there is more than enough land within the urban reserve to

meet the land need over the next 20 years, no lower-priority land was considered for inclusion. The City needed to select land to meet the need for the next 20 years from the available 50-year supply within the urban reserve. The purpose of the coarse filter was to select land that could most efficiently accommodate the City's identified land need. Proximity and parcelization were used as indicators of efficiency for development. Proximity helps to indicate current and short-term pressure for development as well as efficiency for the extension of services. Parcelization is also an indicator of both availability for development and the ability to develop an area in an efficient, coordinated way.

2. Orderly and economic provision of public facilities and services;

Findings

The External Study Areas (ESAs) were made up of the properties that passed through the coarse filter. Lands that did not pass through the coarse filter were not further evaluated because the limitations of proximity and parcel size were sufficient to reach a general conclusion that such lands cannot be served in a manner as orderly or economic as lands that passed through the coarse filter. Once the ESAs were identified a capacity analysis was conducted (*Map 6.2*, Appendix F) similar to the Buildable Lands Inventory following the procedures of OAR 660-024-0050 and ORS 197.186 and 197.296 in determining buildable lands. Additional data were then collected for the ESAs regarding the serviceability for water, sewer, and transportation. This was done to measure the ability to provide public facilities and services in an orderly and economic fashion. Maps of the additional scoring results can be found in Appendix G and the scoring memos provided by the service providers are attached as Appendix H.

In the case of transportation there are major system improvements needed regardless of where the boundary is expanded. Some areas had a greater negative effect on the system than others based on existing infrastructure, network connections, and traffic patterns. Further explanation of how the transportation scoring memo from Kittelson and Associates was applied to the transportation scoring map (*Map 7.1*, Appendix G) was originally provided in the record as Exhibit D of the April 6, 2015 Planning Commission study session agenda. This memo has been included as Appendix I.

The scoring for water serviceability came from staff at the Medford Water Commission. The scoring memo they provided was very thorough and detailed and made for easy conversion to Planning staff's scoring map (*Map 7.2*, Appendix G). There were two requests to change the water scoring map received by Planning after the map was made public at the October 2014 open house. The Medford Water Commission reviewed the requests and ultimately decided that the scores that were provided originally were consistent with the scoring methodology used for all of the ESAs and that those scores appropriately represented the comparative ease/difficulty of providing service based on current conditions. Their response to those requests is included with the scoring memos in Appendix H.

The scoring of sewer serviceability was a little different because there are two service providers within the Urban Reserve. The comments received initially from the two providers were very different, which made comparative scoring difficult. Planning staff took those comments and attempted to rank all of the ESAs (both City and RVS service areas) based on those comments alone. Once Planning staff had a map done a meeting was held with the representatives from the City and RVS who provided the initial comments.

Planning staff and the representatives from both sewer service providers discussed the draft scoring map and found that Planning's scoring was off in many areas. In general RVS viewed all areas within the ESAs as either easy or relatively easy to serve. Even the need for additional pump stations was viewed as a minor part of the standard operations of the district. Conversely, the City of Medford sewer system is in need of major system upgrades that for the most part are not currently funded. Any additional demand on the system, regardless of where it is placed within the ESAs, will require additional investment to improve downstream capacity. Some areas were worse than others and so they were ranked from poor to moderate based on input from the City sewer representative. Both sewer representatives were satisfied with the new map (*Map 7.3*, Appendix G) before the meeting was over. The information obtained from the two services providers is the most accurate, up-to-date information available for our analysis. The ability for the two providers to discuss their system operations and needs in the same room provided the comparative analysis across both systems in all portions of the ESAs.

Policy differences between the two service providers were used in the analysis and helped to determine scores for the whole area. The willingness to use pump stations to provide service to an area is a good example in policy differences: RVS is much more willing to use pump stations in its system than the City of Medford is.

The results of the scoring for all five factors—proximity, parcelization, water, sewer, and transportation—were used to guide the decision on where to expand the City's UGB. In addition to the scoring of the properties for the five factors, the City also had to consider the obligations of the Regional Plan Element. The Regional Plan requires the City to collaborate with the Rogue Valley Metropolitan Planning Organization, applicable irrigation districts, Jackson County, and other affected agencies to produce a conceptual land use plan for the area proposed to be added to the UGB. The conceptual land use plan must be used to demonstrate how the City is meeting targets for density, land use distribution, transportation infrastructure, and mixed-use/pedestrian-friendly areas. The City's conceptual plans for the urban reserve are provided as Appendix J. The scored properties were not ranked on a parcel-by-parcel basis, but rather, areas were selected based on their scores for the five factors and based on the area's ability to meet Regional Plan obligations. The mix of land uses in the area was an important consideration regarding the orderly and economic provision of public facilities and services.

The Council makes the following findings about specific lands:

The portions of MD-2 included in the staff recommendation were not removed in any of the alternatives because MD-2 provides for the kinds of regional commercial development that can serve, and be supported by, users outside of the immediate area. This is due in large part to MD-2's location along Highway 62. In reaching this conclusion, the Council denies Hillcrest's contentions that it is not feasible to make orderly and economic provision of public facilities and services to the lands in MD-2. Specifically, the Council finds that MD-2 scored well in all categories of the City's service delivery analysis, with the exception of transportation. However, as explained in the testimony from Southern Oregon Transportation Engineering, LLC dated August 19, 2015, transportation facilities and services can be provided to MD-2 in an orderly and economic manner.

The future South Valley Employment Center (identified in the Regional Problem Solving process) is contained within the portions of MD-5 originally recommended for inclusion. This area is needed for future economic development in the city and in the region. The South Valley Employment Center is a great fit for a large portion of the identified employment land need. The inclusion of the lower-density residential property to the north of the South Valley Employment Center provides connections between the employment area and existing urban development to the north. The lower-density residential area contains the approximately 120-acre Centennial Golf Club. The golf course is provisionally countable as unbuildable and does not count against the City's supply of developable residential land. The portions of MD-5 east of North Phoenix Road and south of Coal Mine Road help to provide for a portion of the employment land need while also providing for high and medium-density residential development adjacent to a future elementary school. Areas MD-7, MD-8, and MD-9 are well suited to provide the kinds of mixed-use/walkable neighborhoods required by the Regional Plan and to help provide needed affordable housing. The relatively close proximity of these areas to the city core, the fact that much of this area is relatively flat, and the existing network of gridded streets increase the likelihood of well integrated mixed-use/walkable neighborhoods developing in these locations. The Housing Element identified a large need for affordable housing but it did not identify a solution for meeting the need. These portions of the urban reserve can help to meet the need for affordable housing by providing land with relatively low development costs. These areas are fairly flat, they are well connected to existing development, and they score well on serviceability for water, sewer, and transportation compared to other areas.

Originally staff had recommended the inclusion of all of MD-4 and another large section of MD-3 based on the identified land need from the Comprehensive Plan. After the 1000 Friends letter (Appendix C) prompted staff and the Planning Commission to remove 175 acres from the map, staff devised three alternatives for the Commission to choose. The Commission ultimately combined two of the options that removed the western half of MD-3 and the northern two thirds of MD-4 plus added land in western MD-5. The Council decision reverses some of those recommendations, such as adding land at the eastern end of MD-5 because they are essential to achieving goals deemed a priority for the City; specifically, critical bike path connections from eastside park land that will connect to the regional greenway.

This portion of MD-5, generally located south of Cherry Lane, north of Barnett Road, and east of the existing UGB, was not included in staff's recommendation because it did not score as well on the orderly and economic provision of public facilities and services as some of the other portions of the urban reserve. As will be discussed in detail below, the Council determined that the comparative environmental, social, economic, and energy (ESEE) consequences between this particular portion of MD-5 and the applicable portions of MD-4 and MD-3 were strongly enough in favor of MD-5 to offset its lower relative score for public facilities and services.

Conclusions

By using the scores of the five factors, and considering an area's ability to meet the City's projected need by GLUP designation, and the Regional Plan obligations, rather than comparing properties on a parcel-by-parcel basis, the City proposes to expand its UGB in a way that will provide for the orderly and economic provision of public facilities and services.

In choosing to include a portion of MD-5 that did not score as well as some other portions of the urban reserve for the orderly and economic provision of public facilities and services—because the comparative environmental, social, economic, and energy (ESEE) consequences for that portion of MD-5 offset its lower relative score for public facilities and services—the Planning Commission and City Council recognized the need to balance all of the boundary locational factors in determining the final location of the UGB. Whether it is providing areas for aging in place to accommodate the anticipated doubling of the City's elderly population, or resolving existing enclave issues, each area to be included in the boundary expansion has particular value for the City of Medford.

3. Comparative environmental, social, economic, and energy (ESEE) consequences;

Findings—Environmental

One of the components of the coarse filter was proximity. Selecting parcels closer to the existing UGB not only helps to maximize the efficiency of public infrastructure, it helps the environment by reducing motor vehicle trips⁵. A more compact urban area with mixed-use neighborhoods⁶ helps to promote the development and use of transit⁷. Density and distance both play key roles in developing and maintaining public transit options⁸. A more compact urban area with mixed-use neighborhoods also provides greater opportunities to invest in facilities for pedestrians and bicyclists, while at the same time making walking and biking more viable transportation options. The more compact urban

⁵ For reference on pollution from automobiles see «http://www.ucsusa.org/clean_vehicles/why-clean-cars/air-pollution-and-health/cars-trucks-air-pollution.html#.Vld3NNpOWUk»

⁶ The Regional Plan requires the development of mixed-use/pedestrian-friendly areas.

⁷ For reference on the benefits of mixed-use development see «<http://www.mrsc.org/subjects/planning/mixeduse.aspx>»

⁸ For reference on the benefits of transit see «<http://www.usnews.com/news/articles/2011/02/11/public-transportation-key-to-transforming-communities>»

area with mixed-use neighborhoods helps to reduce the amount of pollution caused by motor vehicle traffic by reducing the number of motor vehicle miles traveled; both by providing alternative modes of transportation and by reducing the distance traveled between home, work, shopping, recreation, and so forth.

The selecting of parcels close in to the existing UGB also allows for the continued rural use of the properties nearer the edge of the urban reserve. Unused properties in the outer fringe of the urban reserve also help to benefit the City and the environment by acting as a buffer between urban uses and rural uses and/or natural areas. In contrast, selecting properties nearer the outside edge of the urban reserve would have the effect of disrupting the use of those properties and of the properties closer to the existing UGB. By reducing the impact on the urban reserve areas not being proposed for inclusion, the City is limiting the amount of displacement of rural uses in the urban reserve, thus minimizing the impact on lands outside of it.

The City has regulations in place to guide the development and/or protection of environmentally sensitive areas such as steep slopes and riparian corridors. These rules will be extended to areas added to the UGB once annexed to the City. The City must also adopt a revised Local Wetland Inventory (LWI) for the areas added to the UGB through this proposal. The LWI will identify wetlands and determine which have local significance. A wetland protection ordinance will then be adopted to protect locally significant wetlands from development. This work will be completed once the final boundary of the UGB is determined. The LWI and wetland protection regulations must both be adopted prior to the annexation of any of the areas added to the UGB through this amendment. The Oregon Department of Fish and Wildlife outlined a mitigation process (see Exhibit A, Amendments, p. 5) for the far east portion of MD-5 that is intersected by deer and elk habitat. By making the mitigation plan a pre-annexation requirement, the City will be protecting habitat that falls within its urban reserve.

Conclusions—Environmental

Environmental impacts were a key consideration during the adoption of the urban reserve. Now that the urban reserve is in place and the City must select its future UGB from the urban reserve areas, the biggest environmental consideration is proximity. All of the urban reserve area will be added to the UGB and made available for urbanization eventually, but relative environmental impacts must be considered when determining which properties to include in the UGB at this time. The urbanization of any of this area will have some effect on the environment but the magnitude of the effect has been minimized by selecting parcels near the existing UGB. The environmental protection provisions in the City Code will be extended to the areas added to the UGB when annexed. Both the LWI and wetland protection regulations for these newly added areas must be adopted prior to the annexation of any of the areas.

Findings—Energy

The Regional Plan requires the development of mixed-use/pedestrian-friendly areas. This type of development encourages the use of travel modes other than driving, leading to a reduction in vehicle miles travelled. One of the components of the coarse filter was proximity. Selecting parcels closer to the existing UGB not only helps to maximize the efficiency of public infrastructure, it has the effect of reducing energy use by reducing motor vehicle trips. A more compact urban area, with mixed-use neighborhoods, helps to promote the development and use of transit. Density and distance both play key roles in developing and maintaining public transit options. A more compact urban area with mixed-use neighborhoods also provides greater opportunities to invest in facilities for pedestrians and bicyclists, while at the same time making walking and biking more viable transportation options. The more compact urban area with mixed-use neighborhoods help to reduce energy consumption by reducing the number of motor vehicle miles traveled, both by providing alternative modes of transportation and by reducing the distance traveled between home, work, shopping, recreation, and so forth.

The process of selecting where to expand the UGB included a consideration regarding where anticipated higher-order streets could be connected to other planned and existing higher-order streets based on areas added to the UGB. This process helped to identify where the inclusion of areas currently in the urban reserve could help to provide key urban services to properties currently within the UGB. Some areas, such as portions of MD-2, MD-3, and MD-5, provide the ability to connect higher-order streets and to create a grid pattern of streets that will help to spread traffic within the existing UGB in those areas. This distribution of traffic will help to relieve congestion on existing traffic infrastructure. Therefore these areas have a positive energy consequence through their inclusion in the UGB because of their ability to reduce congestion within the existing UGB.

The inclusion of a portion of MD-5 south of Cherry Lane and East McAndrews Road, north of Barnett Road, and east of the current UGB was done in part to help facilitate the extension of the Larson Creek multi-use trail from North Phoenix Road, through current and future development, and into Chrissy and Prescott Parks. This property was also included, in part, because it plays a role in connecting portions of the existing UGB to sewer service and because it plays a role in connecting Barnett Road to Cherry Lane (see Annexation Policies in Exhibit A and the commitment in Appendix M).

The availability of a dedicated multi-use path in the southeast portion of the urban area will help to reduce local trips in that area. Since the path will also tie into a larger network of trails, including the Larson Creek trail from North Phoenix Road to Bear Creek, and the Bear Creek Greenway trail, it will also allow for regional traffic via bicycle for those interested in traveling a greater distance by bike.

While all portions of the UGB and existing city limit can be served with sewer without the addition of lands to the UGB, the inclusion of this portion of MD-5 will allow for the best routing of sewer service in the area. This best route will have the benefit of elimi-

nating the need for lift stations and will provide the lowest life-cycle cost for the sewer system in the area. The elimination of a lift station reduces the energy use in operating the sewer system and using the lowest-cost, longest-lasting alternative in extending the sewer facilities will also help to conserve energy.

This portion of MD-5 also plays a vital role in connecting Barnett Road to Cherry Lane. This connection will provide a more direct route from residential areas along Hillcrest Road and employment centers along Barnett Road. This same connection will also provide a more direct route from those residential areas to freeway access, northbound at the Garfield/Highland interchange and southbound at the Fern Valley interchange. This street connection helps to reduce the number of miles traveled by providing a more direct route. It also reduces energy consumption by reducing congestion and by providing additional route choices.

Conclusions—Energy

When considering where to expand the UGB, mixed-use development and proximity have the greatest impact on the use and/or conservation of energy. The fact that the needed houses and jobs would be efficiently contained in the current urban area and in areas close to the existing UGB would have generally positive energy consequences due to the increased possibility of non-motorized travel modes between trip generators and decreasing overall “vehicle miles travelled” (VMT). Reid Ewing, a transportation planning researcher and professor at the University of Utah, “looked at all the available evidence and concluded that sprawling communities that require car trips to meet most daily needs exhibit 20–40% higher VMT than more compact, mixed-used, and walkable neighborhoods.”⁹ And as noted in an online edition of *The Atlantic* magazine¹⁰:

We [the US] continue to lead advanced economies in per-capita carbon emissions, 28 percent of which come from transportation. But even if the crunchy granola argument isn’t good enough to make you see the benefits of public transit, consider that trains, trams, buses, and the like reduces traffic congestion, which is good for the life satisfaction of everybody behind the wheel, since science shows long commutes make us unhappy.¹¹

The inclusion of a portion of MD-5 south of Cherry Lane, north of Barnett Road, and east of the current UGB will help facilitate the extension of the Larson Creek multi-use trail from North Phoenix Road, through current and future development, and into Chrissy and Prescott Parks; connect portions of the existing UGB to sewer service along the

⁹ Excerpt from website «<http://streetswiki.wikispaces.com/Vehicle+Miles+Traveled>» (retrieved 2013-11-20), summarizing information from Ewing’s book titled *Growing Cooler: The Evidence on Urban Development and Climate Change*. Chicago: Urban Land Institute, 2007.

¹⁰ Excerpted from «<http://www.theatlantic.com/business/archive/2013/11/the-case-against-cars-in-1-utterly-entrancing-gif/281615/>» (retrieved 2013-11-20)

¹¹ For reference to commuting studies see «<http://www.economist.com/blogs/gulliver/2011/06/perils-commuting>»

lowest life-cycle cost route; and provide a route to connect Barnett Road to Cherry Lane. All of which will have positive impacts on energy use.

Findings—Economic

The City of Medford, as all cities in Oregon, continues to have a goal of providing land to accommodate its 20-year land need for housing and employment, as required under Oregon Revised Statute (ORS) 197.296. The City of Medford's current UGB was adopted in 1990 and was expected to last through 2010. As demonstrated throughout this document, the City does not currently have a 20-year land supply and needs to meet the projected demand for employment and residential land over the 20-year planning period. ORS 197.296(6) recommends addressing the need by expanding the urban growth boundary, by increasing the developable capacity of the urban area, or by a combination of the two. UGBA Phase 1 sought to increase the development capacity of land within the existing UGB in order to accommodate some of the City's projected need for residential and employment land. This phase, UGBA Phase 2 (External Study Area (ESA) Boundary Amendment), seeks to amend the City's UGB and make more land available for urban development.

UGBA Phase 1 had a number of positive effects on the developable capacity within the existing UGB. One of which, the conversion of industrial land to commercial land, helped to increase the likelihood of both commercial and industrial development over the next 20 years by placing these uses in more appropriate locations. There is strong development pressure on the industrial land in the city core, near major transportation routes, to be used for commercial uses. This pressure makes the land less likely to develop with industrial use. The swapping of land types places commercial designations on appropriate tracts of land within the city core while allowing the City to designate more land near the outside of the urban area, but still near major transportation routes, for industrial development. In choosing where to expand its UGB, the City of Medford considered the suitability of employment land for each of the employment types. For example, large tracts of General Industrial, Service Commercial, and Commercial land were selected between North Phoenix Road and Interstate 5, near the future overpass and connection with South Stage Road to the west. This area is planned for a future employment center for the City and for the region. In other cases smaller tracts of employment land were designated in residential areas in order to promote the development of mixed-use neighborhoods.

In addition to appropriately locating land types, the proposed UGB expansion will also have the effect of increasing the availability of all types of urban land. The increased supply of land should have the effect of spurring economic development and improving the local economy by reducing the cost of land. However, this will only be the case if the urbanizable land is held by a large enough number of owners to promote competition

and protect against monopoly and price-fixing¹². Parcel size was one of the components of the coarse filter. It was used as an indicator of parcelization which was used to compare the relative availability of the land within the urban reserve for development. While it is important for the City to select land that is available for development, the selection of only large parcels of land would have the effect of concentrating the supply of land among a relatively small number of owners. By selecting some of the smaller parcels, primarily on the west side of Interstate 5, the City is effectively distributing the supply of developable land to a greater number of property owners.

The City also selected parcels distributed around the existing UGB for inclusion in the UGB expansion area. This was done in part to help provide variety in the locations and types of land available for development and to help distribute the impact of additional development throughout infrastructure systems. Most of the areas in the expansion selection are either adjacent to existing utilities or adjacent to areas that are developing quickly, meaning nearly all the expansion areas will be ready to develop in short order.

The inclusion of a portion of MD-5 south of Cherry Lane, north of Barnett Road, and east of the current UGB was done in part because it plays a role in connecting portions of the existing UGB to sewer service (see Appendix M and Annexation Policies in Exhibit A). While all portions of the UGB and existing city limit can be served with sewer without the addition of lands to the UGB, the inclusion of this portion of MD-5 will allow for the best routing of sewer service in the area. This best route will have the benefit of eliminating the need for lift stations and will provide the lowest life-cycle cost for the sewer system in the area. Both have positive economic impacts.

Other land dedication commitments will help the school system and government services. The partners in MD-2 have made commitments to donating a school site and parkland; partners in MD-7 have committed to donating a fire station site (see Appendix M and Annexation Policies in Exhibit A).

Conclusions—Economic

UGBA Phase 1 had the effect of more appropriately locating employment land. Through careful consideration of the available land within the urban reserve, and the land need by employment type, the City has selected land to efficiently meet the employment need over the 20-year period.

The increased availability of all types of urbanizable land should have a positive effect on the local economy by decreasing the cost of developable land. This can only occur if the land is held by a large enough number of owners to promote competition. By selecting a mix of both large and small parcels the City will provide an adequate supply of developable land while helping to distribute the supply to a greater number of property

¹² For reference on the effects of monopoly on the supply and demand curve see
«<http://www.cliffsnotes.com/more-subjects/economics/monopoly/demand-in-a-monopolistic-market>»

owners. Close adjacency to existing development or developing areas will give most of the areas a similar ability to develop, further increasing the opportunity for competition.

Findings—Social

The wide-ranging factors that influence the social effect of the proposal will be discussed individually. There is some overlap between the social factors and the environmental, energy, and economic factors because many of the things that influence those scores—proximity, mixed-use development, and availability of developable land—also influence the social effect of the proposal.

Traffic: One of the components of the coarse filter was proximity. Selecting parcels closer to the existing UGB not only helps to maximize the efficiency of public infrastructure, it has the social benefit of reducing motor vehicle trips. A more compact urban area, with mixed-use neighborhoods, helps to promote both the development and use of transit. Density and distance both play key roles in developing and maintaining public transit options. A more compact urban area also provides greater opportunities to invest in facilities for pedestrians and bicyclists, while at the same time making walking and biking more viable transportation options. The more compact urban area helps to reduce the amount of motor vehicle traffic by reducing the number of motor vehicle miles traveled; both by providing alternative modes of transportation and by reducing the distance traveled between home, work, shopping, recreation, etc.

The inclusion of a portion of MD-5 south of Cherry Lane and East McAndrews Road, north of Barnett Road, and east of the current UGB was done in part to help facilitate the extension of the Larson Creek multi-use trail from North Phoenix Road, through current and future development, and into Chrissy and Prescott Parks. This property was also included, in part, because it plays a role in connecting Barnett Road to Cherry Lane.

The availability of a dedicated multi-use path in the southeast portion of the urban area will help to reduce local trips in that area. Since the path will also tie into a larger network of trails, including the Larson Creek trail from North Phoenix Road to Bear Creek, and the Bear Creek Greenway trail, it will also allow for regional traffic via bicycle for those interested in traveling a greater distance by bike. Although paths can be developed outside urban growth boundaries, there is a public cost benefit in having urban-level development help pay for it.

This portion of MD-5 also plays a role in connecting Barnett Road to Cherry Lane. This connection will provide a more direct route from residential areas along Hillcrest Road and employment centers along Barnett Road. This same connection will also provide a more direct route from those residential areas to freeway access, northbound at the south Medford interchange and southbound at the Fern Valley interchange. This street connection helps to reduce traffic congestion by providing a more direct route for some travelers and by providing additional

route choices. In addition, inclusion eliminates the single frontage on Cherry Lane, which needs improvement to fulfill its build-out as a higher-order street.

Land Availability: In addition to appropriately locating land types the proposed UGB expansion will also have the effect of increasing the availability of all types of urban land. The increased supply of land should have the effect of spurring economic development and improving the local economy by reducing the cost of land. However, this will only be the case if the urbanizable land is held by a large enough number of owners to promote competition and protect against monopoly and price-fixing. Parcel size was one of the components of the coarse filter. It was used as an indicator of parcelization which was used to compare the relative availability of the land within the urban reserve for development. While it is important for the City to select land that is available for development the selection of only large parcels of land would have the effect of concentrating the supply among a relatively small number of owners. By selecting some of the smaller parcels, primarily west of Interstate 5, the City is effectively distributing the supply of developable land to a greater number of property owners. The final selection represents an agreeable boundary that balances a number of competing interests in an equitable manner.

Relative Cost of Development: The findings for the “Orderly and economic provision of public facilities and services,” above are pertinent here as well. Since the cost of development is oftentimes passed on to the consumer through increased costs, and to the general population through increased service rates and increased taxes, selecting properties with the lowest relative cost of development has a positive social effect.

The External Study Areas (ESAs) were made up of the properties that passed through the coarse filter. Since the “efficient accommodation of identified land needs” is set as the first priority, any area that did not meet the measure for efficiency (the coarse filter) was eliminated from further consideration prior to further study on the ESAs. Once the ESAs were identified a capacity analysis was conducted. Additional data were then collected for the ESAs regarding the serviceability for water, sewer, and transportation. This was done to measure the ability to provide public facilities and services in an orderly and economical fashion.

The results of the scoring for all five factors—proximity, parcelization, water, sewer, and transportation—were used to guide the decision on where to expand the City’s UGB. In addition to the scoring of the properties for the five factors the City also had to consider the obligations of the Regional Plan Element, adopted in 2012. The Regional Plan requires the City to collaborate with the Rogue Valley Metropolitan Planning Organization, applicable irrigation districts, Jackson County, and other affected agencies to produce a conceptual land use plan for the area proposed to be added to the UGB. The conceptual land use plan must be used

to demonstrate how the City is meeting targets for density, land use distribution, transportation infrastructure, and mixed-use/pedestrian-friendly areas. The scored properties were not ranked on a parcel-by-parcel basis, but rather, areas were selected based on their scores for the five factors and based on the area's ability to meet Regional Plan obligations. The mix of land uses in the area was an important consideration regarding the orderly and economic provision of public facilities and services.

The City also selected parcels distributed around the existing UGB for inclusion in the UGB expansion area. This was done in part to help provide variety in the locations and types of land available for development and to help distribute the impact of additional development throughout infrastructure systems.

Planned Neighborhoods: Rather than provide for individual land types on segregated portions of the urban reserve, most of the areas selected provide for an integrated mix of uses. By selecting areas that are conceptually planned for a variety of uses the City is not only meeting the Regional Plan requirement for mixed-use/pedestrian-friendly neighborhoods, but is also setting the stage for a type of neighborhood development that helps to improve public health and community cohesiveness.¹³

The inclusion of a portion of MD-5 south of Cherry Lane and East McAndrews Road, north of Barnett Road, and east of the current UGB was done in part to help facilitate the continued development of the Southeast Plan. The Southeast Plan has been in stages of development since the 1990s. The plan is for a large mixed-use development east of North Phoenix Road, generally centered on Barnett Road. The inclusion of this particular portion of MD-5 helps to facilitate parts of the Southeast Plan, including a planned school, a planned park, and a planned trail connection. The trail was a significant feature during testimony by area residents and land owners. This property will also help to provide additional residential development in the area of the Southeast Plan, which will help to support planned commercial development in the area. It also introduces some high-density residential into the southeast, an area with very little density diversity at present.

Compatibility: By requiring urbanization plans for each area prior to annexation the City will have the opportunity to consider the compatibility of the development with existing uses and other planned uses in the vicinity. The urbanization plans will also insure that the residential density and other requirements of the Regional Plan are met.

¹³ For reference on the benefits of mixed-use development see
«<http://www.wri.org/blog/2014/07/people-oriented-cities-mixed-use-development-creates-social-and-economic-benefits>»

Conclusions—Social

The social consequences of the selected boundary location are positive relative to other boundary location alternatives. The selected location helps to minimize the effect that increased development will have on transportation by helping to promote the reduction of vehicle miles traveled. The expansion proposal has a positive effect on land availability by increasing the supply of all urbanizable land types and by selecting land that is both available for development and held by a large enough number of property owners to promote competition in the market. The boundary location was selected in large part due to its relative cost of development compared to the alternatives. The expansion areas and the land-use distributions help to promote mixed-use/pedestrian-friendly neighborhoods, which have a number of social benefits. The trail connection in MD-5 East is significant enough that the Council includes it as a substantiating factor for inclusion of the area and seeks to reify it by making it a requirement of development. The City required a written commitment from the property owners to provide a trail (see Appendix M). Compatibility between development on these newly added areas and existing uses will be considered during the urbanization plan process, prior to annexation.

Conclusions—overall

On balance the environmental, social, economic, and energy (ESEE) consequences of the selected boundary are positive compared to other alternatives. The biggest factors in having a favorable ESEE are proximity to the existing UGB and a large enough distribution of ownership to promote competition in the market for urbanizable land. The City has selected land from its urban reserve that is both close to the existing UGB (and existing development) and comprises a large enough number of parcels to help promote competition in the market for urbanizable land.

4. Compatibility of the proposed urban uses with nearby agricultural and forest activities occurring on farm and forest land outside the UGB.

Findings

A major emphasis of—and a driving force behind—the Greater Bear Creek Valley Regional Problem Solving Process (RPS), which resulted in the adoption of the Regional Plan Element, was the protection of farm and forest land from urbanization and incompatible urban development. That process resulted in the establishment of an urban reserve for the City of Medford. The urban reserve, by its definition, establishes the location of future urban development, having taken into account existing and planned farm and forest uses. In establishing the urban reserve, the City of Medford agreed to the agricultural buffer standards of the Regional Plan. Regional Plan Element, 4.1.10 requires the use of agricultural buffers to separate urban uses from agricultural uses. The City adopted code that applies to land added to the UGB from the Urban Reserve. (City Code Section 10.802, Urban–Agricultural Conflict in Urban Reserve, August 16, 2012).

Selecting parcels close in to the existing UGB allows for the continued rural use of the properties nearer the outer edge of the urban reserve. The lower-intensity use of prop-

erties in the outer fringe can act as a buffer between urban uses and farm and forest uses outside of the UGB.

Conclusions

By selecting parcels near the existing UGB for inclusion into the UGB, the City is leaving properties on the outer edge of the Urban Reserve to act as a buffer between urban uses and agricultural and forest activities occurring on land outside of the UGB. Furthermore, Municipal Code Section 10.802 requires conflict mitigation (including buffers) between urban uses and agricultural uses.

Now that the urban reserve has been established for the City of Medford, and the required agricultural buffer codes are in place, all land within the urban reserve is both available for, and appropriate for, future urban development. This fact is apparent in ORS 197.298 which identifies land that is designated urban reserve as being first-priority land when expanding an urban growth boundary.

Boundary Location Summary Findings and Conclusions

The City of Medford has used each of the four boundary locational factors in determining the future boundary location. Each of these factors had to be weighed and balanced against each of the others and the proposed boundary amendment as a whole scored well on each of these factors. An alternatives analysis was not completed on a parcel-by-parcel basis but rather the reasons for how and why areas were selected (or eliminated) through each of the steps/processes (coarse filter, serviceability, ESEE) has been provided. This process of selecting certain areas over others through each of the steps is the City's alternatives analysis. An alternatives analysis was not completed on a parcel-by-parcel basis for the following reasons: 1) the lots (parcels) involved are of vastly different size, 2) the number of possible alternatives to compare is prohibitively large, 3) the properties have been planned for a number of different uses, and 4) there is value in analyzing the recommendation as a whole using the boundary location factors.

Individual lots could not be objectively compared, one against another, because lots vary greatly in size. How can a five-acre lot be objectively weighed against a 100-acre lot? The only way to fairly compare the two would be to either break the larger lot into smaller pieces or to combine a number of smaller lots into a larger aggregate. Not only would this exercise require the planners to choose where to split lots and/or which lots to combine, it would also alter a part of the what defines each of these lots, their size and parcelization characteristics. Because of these challenges, when comparing boundary location alternatives, rather than compare different lots, areas (all of MD-8, portions of MD-5, etc.) were compared. This not only helped to balance the size of the areas compared, it also helped in comparing characteristics that could not be compared on a parcel-by-parcel basis. These characteristics included the mix of conceptual plan uses, the coordination of transportation infrastructure, and parcelization.

The use of larger sections of the urban reserve to compare against each other also helped to reduce the number of alternatives to compare. Still, a detailed comparison of

each of these subareas against each of the others, for each of the boundary locational factors, was prohibitive in its magnitude. This kind of system would have required the City to devise a weighted ranking system for each of the criteria. These ranked scores for each of the areas would then be totaled and areas would be selected based on scores, with the highest score being selected first and then moving down the list until the land need was met. But how do you compare a property planned for industrial use against one planned for residential? The planned use of the property has some value in determining which properties to select, but how do you determine the comparative value for property use designation? This kind of rigid system would likely miss nuances about how different areas interact with each other in a system. For example, this kind of ranking would not have considered the necessary mix of land types needed.

This kind of reductionist approach would limit the City's ability to consider the boundary location decision as a whole. After all, this is a single, cohesive proposal determining where future urban development will occur around the city by selecting lands from a larger set made up entirely of "first-priority land". The only way to insure that the proposal is balanced is to look at it in its entirety and compare it against the boundary locational factors as one piece.

* * * * *

Urban Growth Boundary amendment approval criteria from Urbanization Element, Section 1.2.3

Criterion a. continued: The standards and criteria in Goal 14, OAR 660, Division 24, and other applicable State Goals, Statutes, and Rules.

OAR 660

Oregon Administrative Rule (OAR) Chapter 660 contains rules adopted by the Land Conservation and Development Commission (LCDC) and governs actions by LCDC and DLCD as well as local governments that are implementing statutes within the purview of these agencies. . There are several sections of OAR 660 which apply to the adoption of individual Comprehensive Plan Elements. Each Comprehensive Plan Element being relied upon to support this UGB amendment (e.g., the Economic Element) was found to be consistent with all applicable portions of OAR 660 at the time of their adoption. Rather than repeat those findings here those findings are included in the record, and findings, for this proposed UGB amendment, through reference.

The proposed amendments' compliance with applicable portions of OAR 660 has been discussed, in large part, in the proceeding text. Any applicable portions of OAR 660, not already discussed, will be discussed below.

Division 24

OAR 660, Division 24 deals with urban growth boundaries. On January 1, 2016, amendments to OAR 660, Division 24 became effective. The new rules included a provision stating that a local government that had initiated a UGB amendment before January 1, 2016, may choose not to apply the amended Division 024 rules to its pending UGB amendment (OAR 660-024-0000(4)). The City initiated its amendments before January 1, 2016, and has completed its analysis to date consistent with the rules in effect before the cut-off date. Applying the new rules at this point in the process could be disruptive and inefficient; therefore, the Council chooses not to apply the new Division 24 rules to these amendments.

Most of the applicable portions of Division 24 have already been covered in the Goal 14 findings above. These include: Population Forecasts; Land Need; Land Inventory and Response to Deficiency; and Boundary Location Alternatives Analysis. The following portions of OAR 660-024-0020 (Adoption or Amendment of a UGB) also apply and will be discussed as indicated:

- (1) All statewide goals and related administrative rules are applicable when establishing or amending a UGB, except as follows:
 - (b) Goals 3 and 4 are not applicable [this is covered under Goals 3 and 4 below];
 - (c) Goal 5 and related rules under OAR chapter 660, division 23, apply only in areas added to the UGB, except as required under OAR 660-023-0070 and 660-023-0250 [this is covered under Goal 5 below];
 - (d) The Transportation Planning Rule requirements under OAR 660-012-0060 need not be applied to a UGB amendment if the land added to the UGB is zoned as urbanizable land, either by retaining the zoning that was assigned prior to inclusion in the boundary or by assigning interim zoning that does not allow development that would generate more vehicle trips than development allowed by the zoning assigned prior to inclusion in the boundary [this is covered under Goal 12 below];

* * * * *

Urban Growth Boundary amendment approval criteria from Urbanization Element, Section 1.2.3

Criterion a. continued: **The standards and criteria in Goal 14, OAR 660, Division 24, and other applicable State Goals, Statutes, and Rules.**

Other applicable State Goals, Statutes, and Rules

Goal 1—Citizen Involvement

Findings

Goal 1 requires the City to have a citizen involvement program that sets the procedures by which affected citizens will be involved in the land use decision process. Goal 1 requires provision of the opportunity to review proposed amendments prior to a public hearing, and recommendations must be retained and receive a response from policy-makers. The rationale used to reach land use decisions must be available in the written record. The City of Medford has an established citizen-involvement program consistent with Goal 1 that includes review of proposed Comprehensive Plan amendments by the Planning Commission and City Council. Affected agencies and departments are also invited to review and comment on such proposals, and hearing notices are published in the local newspaper, and posted on the site. This process has been adhered to in this proposed amendment.

The Planning Department conducted an open house (October 28, 2014) to receive comments about the scoring methods used for inclusion in the expansion from property owners within the urban reserve. For the public hearing process staff sent hearing notification to all property owners within the urban reserve. Staff prepared press releases and provided information on the City's website. Finally, this proposal was considered by the Planning Commission and the City Council during televised public hearings.

The testimony and evidence provided to the community during the hearings was voluminous (see Appendix K; more than 120 letters were submitted during the Council meetings alone), but ultimately the expansion option chosen has come with the most support and concessions of the affected property owners and as such best complies with this Goal. Council gives credit to all who worked or volunteered their time on this process as Council believes that it meets all the overarching principles guiding land use in Oregon and specifically provides for a healthy environment, sustains a healthy economy, ensures a desirable quality of life, and has equitably allocated the benefits and burdens of land use planning.

Conclusions

By following a supplemented notification and comment procedure, the City provided better-than-adequate opportunities for citizen input.

Goal 2—Land Use Planning

Findings

Goal 2 requires the City to establish a land use planning process and policy framework to assure an adequate factual base for its land use decisions. Goal 2 also requires the City to coordinate its review and decision with appropriate government agencies.

The City has a land use planning process and policy framework in the form of a Comprehensive Plan and development regulations in Chapter 10 of the Municipal Code. These are the bases for decisions and actions. Accordingly, and for the additional reasons set forth under the “Goal 14—Land Need” heading in these findings, the City is entitled to rely upon these adopted Plan elements, including the Housing Element, in this matter.

Additionally, the City provided notice and an opportunity to comment on the UGB amendment to affected government agencies, including Jackson County, ODOT, and DLCD. These findings address the comments from these agencies.

Conclusions

There is an adequate factual basis for the proposed changes and the adopted process has been followed for this UGB amendment. Further, the City has met the coordination requirements of Goal 2.

Goal 3— Not applicable per OAR 660-024-0020(1)(b).

Goal 4— Not applicable per OAR 660-024-0020(1)(b).

Goal 5— Natural Resources, Scenic & Historic Areas, and Open Spaces

Findings

The City has regulations in place to guide the development and/or protection of environmentally sensitive areas such as steep slopes and riparian corridors. These rules will be extended to areas added to the UGB once annexed to the City. The City must also adopt a revised Local Wetland Inventory (LWI) for the areas added to the UGB through this proposal. The LWI will identify wetlands and determine which have local significance. A wetland protection ordinance will then be adopted to protect locally significant wetlands from development. This work will be completed once the final boundary of the UGB is determined. The LWI and wetland protection regulations must both be adopted prior to the annexation of any of the areas added to the UGB through this amendment. The City’s historic inventory must also be amended to include the areas added through this amendment.

Some of the easternmost portions of the urban reserve are within a deer and elk habitat area. The Oregon Department of Fish and Wildlife (ODFW) would prefer that this area remain in its natural condition and if development does occur within this area it must have special standards used to protect the habitat or mitigation measures must be de-

veloped in coordination with ODFW to protect/enhance habitat. With the exception of Prescott and Chrissy parks, which allow for very limited development, none of the adopted proposal extends the UGB into the deer and elk habitat area.

According to OAR 660-024-0020 (Adoption or Amendment of a UGB) “Goal 5 and related rules under OAR chapter 660, division 23, apply only in areas added to the UGB, except as required under OAR 660-023-0070 and 660-023-0250.” This means that Goal 5 compliance is only under review for the areas added to the boundary. Goal 5 compliance has already been demonstrated for the existing boundary. ORS 197.250 [Compliance with Goals Required] requires that “...all comprehensive plans and land use regulations adopted by local government to carry out those comprehensive plans... shall be in compliance with the goals within one year after the date those goals are approved by the Land Conservation and Development Commission.” The City shall demonstrate full compliance with Goal 5 soon after the adoption of the revised UGB through the extension of existing development codes to areas added to the UGB, through the adoption of a wetland protection ordinance for locally significant wetlands within the newly added areas, and through the inclusion of these newly added areas in the City’s historic inventory. A wetlands inventory has already been completed; as of the date of these findings the City is working on adoption of the inventory and protection regulations.

Conclusions

The City will demonstrate compliance with all portions of Goal 5 within one year of the adoption of the proposed amendment and prior to annexation per OAR 660-024-0024 and per the revised Urban Growth Management Agreement.

Goal 6—Air, Water, and Land Resources Quality

Findings

One of the components of the coarse filter was proximity. Selecting parcels closer to the existing UGB not only helps to maximize the efficiency of public infrastructure, it helps the environment by reducing motor vehicle trips. A more compact urban area with mixed-use neighborhoods helps to promote the development and use of transit. Density and distance both play key roles in developing and maintaining public transit options. A more compact urban area also provides greater opportunities to invest in facilities for pedestrians and bicyclists, while at the same time making walking and biking more viable transportation options. The more compact urban area helps to reduce the amount of pollution caused by motor vehicle traffic by reducing the number of motor vehicle miles traveled; both by providing alternative modes of transportation and by reducing the distance traveled between home, work, shopping, recreation, and so forth.

Selecting parcels close in to the existing UGB also allows for the continued rural use of the properties nearer the outer edge of the urban reserve. Unused properties in the outer fringe of the urban reserve also benefits the City and the environment by acting as a buffer between urban uses and rural uses and/or natural areas. In contrast, selecting properties nearer the outside edge of the urban reserve would have the effect of dis-

rupting the use of those properties and of the properties closer to the existing UGB. By reducing the impact on the urban reserve areas not being proposed for inclusion the City is limiting the amount of displacement of rural uses in the urban reserve, thus minimizing the impact on lands outside of the urban reserve.

Many of the Goal 5 findings, above, also apply to the findings here under Goal 6.

Conclusions

Environmental impacts, including air, water, and land resources quality, were key considerations during the adoption of the urban reserve. Now that the urban reserve is in place, and the City must select its future UGB from the urban reserve areas, the biggest environmental consideration is proximity. All of the urban reserve area will be added to the UGB and made available for urbanization eventually, but relative environmental impacts must be considered when determining which properties to include in the UGB at this time. The urbanization of any of this area will have some effect on the environment but the magnitude of the effect has been minimized by selecting parcels near the existing UGB. The environmental protection provisions in the Municipal Code will be extended to the areas added to the UGB when annexed. Both the LWI and wetland protection ordinance for these newly added areas must be adopted prior to the annexation of any of the areas.

Goal 7—Areas Subject to Natural Hazards

Findings

Slopes: The City of Medford has existing hillside regulations, Municipal Code Sections 10.929–10.933, that regulate the development of property with slopes in excess of 15 percent. These procedural requirements are meant to decrease soil erosion and protect public safety. This code section will apply to any and all areas with slopes exceeding 15% added to the UGB through this amendment once annexed to the City. Areas exceeding 25% slope were classified as unbuildable in the capacity analysis.

Fire: The risk of wildfire in and around Medford often rises to extreme levels during the summer months. The City of Medford has Fire, Building, and Development codes in place to help to mitigate the risk of wildfire in the city. One such provision is Municipal Code Section 7.022, which prohibits the use of fireworks within the hazardous wildfire areas as defined by Jackson County. Inclusion of land in MD-5 will allow the improvement and extension of streets, such as Cherry Lane and East Barnett Road, and development of new streets to increase the density of evacuation routes in the eastside.

Flood: Because the City participates in the National Flood Insurance Program, and is a CRS community, the Municipal Code allows development within flood plains provided that buildings meet certain construction standards designed to minimize damage from floods. City policies and codes do not have locational standards with respect to flood plains, but there is a recommendation in the Environmental Element that states “Development and redevelopment should be highly scrutinized when located in floodplains.”

Conclusions

When considering where to expand its UGB the City is limited to the areas within the urban reserve. All Statewide Planning Goals, including Goal 7, were considered as part of the selection of the urban reserve. The City has development standards in place to mitigate the risk of natural hazards from flood, fire, and steep slopes. These standards will be extended to applicable areas when annexed to the City.

Goal 8—Recreation Needs

Findings

The Other Residential Land Needs section of the Housing Element examines existing conditions for public and semi-public land to forecast future need for this land type.

According to the Housing Element:

Lands needed for public operations and facilities include lands for city facilities, schools, substations, and other public facilities. Land needs were estimated using acres per 1,000 persons for all lands of these types. Lands needed for parks and open space estimates use a parkland standard of 4.3 acres per 1,000 persons based on the level of service standard established in the Medford Leisure Services Plan Update (2006). This update includes land needed for neighborhood and community parks, which usually locate in residential plan designations. It does not include land needed for natural open space and greenways, which may also be located in residential plan designations.

The resulting land need for community and neighborhood parks is shown in *Table 1.5*.

Table 1.5. City Park Need (adapted from Housing Element Table 40)

Type of Use	Existing Acres	Existing Acres per 1000 Persons	Assumed Need (ac/1000 Persons)	Estimated Need per 1000 Persons, 2009–2029
City Parks	527	6.8	4.3	153

In addition to the standard urban reserve areas the Regional Plan Element identifies two large regional park areas, Prescott Park and Chrissy Park. These areas are City-owned wildland parks totaling 1,877 acres. Inclusion as urban reserve was intended to serve as a mechanism to eventually incorporate this City property into the City boundary. The two MD-P areas were not considered areas for future urban growth because of their classification as parkland. There is no residential, commercial, or industrial development planned for the MD-P acres. They present a tremendous recreational and open space asset to the City and the region, in addition to creating a buffer between the city and rural lands to the north and east. However, due to their location along the eastern periphery of the city and steep topography, these lands satisfy little of the localized open space needs throughout the city and do not meet land needs for traditional urban parkland.

Another regional recreation use already in existence is Centennial Golf Club. If the Man-or-owned land surrounding it is brought in, then its inclusion is unavoidable. Its function as a regional asset will be unaffected by inclusion. The golf course has been counted as unbuildable by staff so far because the property owners intend to obtain an open space assessment for the land (ORS 197.186; see also commitment in Appendix M). Although the land has been classified as unbuildable in order to remain consistent with ORS 197.186 it might more appropriately be viewed as developed. The open space assessment helps to insure that the land will remain a golf course and as a golf course the land is already developed and meeting that regional need. The land will have no more ability to meet an identified land need for the City as a golf course within the boundary than it does outside of the boundary.

Conclusions

The Other Residential Land Needs of the Housing Element identified a need for 153 gross acres of additional parkland for neighborhood and community parks, outside of the existing UGB. The Regional Plan Element also includes two large wildland park areas that are owned by the City. These areas, Chrissy and Prescott parks, are intended to provide both a recreational and open space resource for the City and for the region. While both help to meet the recreational needs for the City these are two different land types (neighborhood and community park vs. regional/wildland park and open space) that provide two discreet types of uses for the City. The proposed UGB expansion will include an adequate supply of land determined to be needed by the Leisure Services Plan to accommodate a 20-year population.

Goal 9—Economic Development

Findings

Goal 9 factors were thoroughly addressed in the adoption and acknowledgement of the Economic Element of the Comprehensive Plan. Because the Economic Element has been deemed consistent with Goal 9, and it is being relied upon to determine the City's employment land need, detailed findings under Goal 9 are not necessary for this proposed boundary amendment. However, some discussion regarding Goal 9 compliance is provided below as a reference to the information from the Economic Element that was used in this amendment process. Much of this text is repeated from other sections of this document where it is more appropriately considered.

The process of determining Medford's land need for the next 20 years started with the adoption of the Population Element in 2007. This study looked at the forecasted population growth in Medford through 2040. The next step was the Buildable Lands Inventory (BLI), adopted in 2008, consistent with OAR 660-024-0050 and ORS 197.186 and 197.296. This study identified the number of acres, in total, and by type, available for development within the City's current UGB. The BLI showed that there are approximately 1,078 employment acres available for development within Medford's UGB. The next step was the Economic Element, adopted in 2008, which considered the projected

population growth, along with economic trends, to determine the overall need for employment land over the 20-year planning period. The study concluded that an additional 708 gross acres were needed to meet the demand for employment land. However, as shown in the Appendix B, this does not properly account for the excess supply of industrial land available within the existing boundary. When properly calculated (see Appendix B) the need for employment land increases to 765 gross acres.

Through these studies the City of Medford demonstrated a deficit in the supply of employment land within its existing UGB over the next 20 years. ORS 197.296 subsection (6) recommends addressing the need by expanding the urban growth boundary, by increasing the developable capacity of the urban area, or by a combination of the two. Urban Growth Boundary Amendment (UGBA) Phase 1 (ISA GLUP Amendment) sought to change the General Land Use Plan map designation of land in the existing urban area for the purpose of increasing its development capacity in order to accommodate some of the City's projected need for residential and employment land. UGBA Phase 1 resulted in more efficient use within the UGB in the following ways:

- It took surplus industrial land (land in excess of the need for the next 20 years) and converted it to commercial land. This resulted in the accommodation of a larger portion of the employment need within the existing UGB.
- The conversion of industrial to commercial also helped to increase the likelihood of both commercial and industrial development over the next 20 years by placing these uses in more appropriate locations. There is heavy development pressure for commercial uses on the industrial land in the city core near major transportation routes. This pressure makes the land less likely to develop with industrial use. The swapping of land types places commercial designations on tracts of land within the city core while allowing the City to designate more land near the outside of the urban area for industrial development.
- While 58 acres of land were converted from residential to employment GLUP designations the total residential land need only increased by 36 acres. This is due to the fact that some of this land was not identified as meeting any portion of the future residential land need but it is now being counted toward meeting the employment land need. This land was identified as developed for residential but is expected to redevelop as commercial.

UGBA Phase 1 resulted in a decrease in the amount of land needed outside the current UGB. Before these efficiency measures, a total of 765 acres were needed outside of the existing UGB for employment purposes. After UGBA Phase 1, that number was reduced to 637 acres.

Conclusions

UGBA Phase 1 converted surplus industrial land to commercial land which allowed for more of Medford's need for employment land to be accommodated within its existing UGB. The conversion also resulted in the increased likelihood of a larger amount of Medford's employment land need being met within the existing UGB by more appropri-

ately locating both commercial and industrial land. UGBA Phase 1 also reduced the overall land need for the City by converting some residential land that was not identified as meeting any portion of the future residential land need to employment land that is now counted toward meeting the employment land need. While 58 acres of land was converted from residential to employment GLUP map designations the total residential land need only increased by 36 acres. These adopted efficiency measures helped to address a portion of the City's employment land need, but an additional 637 gross acres of employment land outside of the existing UGB are needed. The proposed UGB expansion will allow the City to meet its identified need for employment land.

Goal 10—Housing

Findings

Goal 10 factors were thoroughly addressed in the adoption of the Housing Element of the Comprehensive Plan. Because the Housing Element has been deemed consistent with Goal 10, and it is being relied upon to determine the City's employment land need, detailed findings under Goal 10 are not necessary for this proposed boundary amendment. However, some discussion regarding Goal 10 compliance is provided below as a reference to the information from the Housing Element that was used in this amendment process. Much of this text is repeated from other sections of this document where it is more appropriately considered.

In 2012 the City, together with 5 other cities in the valley, adopted a Regional Plan for accommodating a doubling of the region's population. Regional Plan Element 4.1.5 requires a minimum density of 6.6 units per gross acre for all newly annexed areas for the years 2010 through 2035. The aggregate average density of the residential land need, determined by the Housing Element, was 6.9 units per gross acre (see *Table 1.2 under Land Need*). Some of this density was then shifted into the existing UGB through UGBA Phase 1. This density shift resulted in an increased need for low-density residential and a decreased need for medium-density and high-density residential outside of the existing boundary. While this density shift helped to accomplish a number of positive benefits it also makes meeting the minimum density requirement of the Regional Plan more difficult. With the revised ratios of residential land types in the UGB expansion area, the average densities for each of the residential land types alone will not result in a density of 6.6 units per gross acre or above.

The Housing Element (2010) provides an accurate representation of the City's housing need over the next 20 years. The Regional Plan imposes a density standard that is in excess of the density supported by the Housing Element now that the intensification measures from UGBA Phase 1 are completed. The Regional Plan also requires a density of 7.6 units per gross acre for all newly added areas for the years 2036 to 2050. In order to meet the density obligations of the Regional Plan the City will require an urbanization plan to be submitted, showing compliance with the Regional Plan obligations for density and land use distribution, prior to annexation of any of the land added through this UGB

amendment process. Acceptable methods for meeting the density standards will include:

- Committing areas to higher density zones within a General Land Use Plan (GLUP) designation. For example, an area within the UR GLUP designation could be designated as SFR-10 (Single Family Residential – 10 units per acre) which would insure a minimum density of 6 units per acre. By establishing “pre-zoning” within the established GLUP designations the residential density for the area can be moved higher than the minimum, or even average, density that the GLUP would accomplish.
- Requesting GLUP map changes as part of the urbanization plan approval process. This will allow for additional areas for medium-density and high-density development within the areas added to the UGB. This technique would allow for more flexibility in meeting the density obligations of the Regional Plan without imposing a housing mix that is not consistent with the Housing Element. This would allow for flexibility in housing types as the market shifts toward higher-density housing while also setting the stage for the future density standard of 7.6 units per acre required by the Regional Plan. This approach will also help to address the affordable housing need identified in the Housing Element. By adding additional high-density housing throughout the UGB (in the existing UGB through Phase 1 and in the newly added areas by allowing for GLUP changes to higher-density), the City is enabling more high-density housing, which is needed to provide more affordable housing within Medford.

Goal 10 requires that “plans shall encourage the availability of adequate numbers of needed housing units at price ranges and rent levels which are commensurate with the financial capabilities of Oregon households and allow for flexibility of housing location, type, and density.” By allowing some residential areas to request higher density GLUP map designations the City is providing for more flexibility of housing types in the UGB expansion areas.

In addition to forecasting future residential land needs, the Housing Element also determined the amount of land needed for future public and semi-public uses. OAR 660-024-0040 (10) allows for a “safe harbor” net-to-gross factor of 25% for streets and roads, parks and school facilities. A letter was submitted into the record by Greg Holmes of 1000 Friends of Oregon, dated March 3, 2015, that challenges some of the City’s residential land need assumptions. Rather than use the safe harbor amount the Housing Element calculates the net-to-gross factor for streets based on observation of the existing residential areas in the city. According to the last paragraph on page 57 of the Housing Element “... the forecast shows land need in net acres. Net acres is the amount of land needed for housing, not including public infrastructure (e.g. roads). Gross acres is the estimated amount of land needed for housing inclusive of public infrastructure. The net-to-gross factor allows for conversion between net acres to gross acres. The net-to-gross factor is highest (23%) for single-family detached dwellings, decreasing to 10% for multi-unit projects.” Parks and schools were not considered in the net-to-gross factor,

but rather, were included in the Public and Semi-public Land Needs portion of the Housing Element, which concluded that 153 acres of park land and 20 acres of school land was needed in the UGB expansion area.

The Other Residential Land Needs section of the Housing Element examines existing conditions for public and semi-public land to forecast future need for this land type.

According to the Housing Element:

Lands needed for public operations and facilities include lands for city facilities, schools, substations, and other public facilities. Land needs were estimated using acres per 1,000 persons for all lands of these types. Lands needed for parks and open space estimates use a parkland standard of 4.3 acres per 1,000 persons based on the level of service standard established in the Medford Leisure Services Plan Update (2006). This update includes land needed for neighborhood and community parks, which usually locate in residential plan designations. It does not include land needed for natural open space and greenways, which may also be located in residential plan designations.

See *Table 1.1*.

Conclusions

The Housing Element provides for an adequate land supply at a realistic housing mix for the planning horizon. In addition to land for housing, the Housing Element also accounts for land needed to provide for streets and other utilities, and for public and semi-public uses, which usually occur on residentially zoned properties. The residential density requirements of the Regional Plan were added to the Comprehensive Plan after the adoption of the Housing Element. By requiring urbanization plans for all of the areas being added to the UGB prior to annexation, the City can insure that the residential density standards are being met. The required urbanization plans must demonstrate compliance with the minimum density standards and with the land use distributions required by the Regional Plan Element. By allowing some residential areas to change their GLUP map designation to higher densities the City is providing more flexibility of housing types in the UGB expansion areas.

Goal 11—Public Facilities and Services

Findings

The External Study Areas (ESAs) were made up of the properties that passed through the coarse filter (Appendix E). Additional data were collected for the ESAs regarding the serviceability for water, sewer, and transportation. This was done to measure the ability to provide public facilities and services in an orderly and economic fashion. The scoring memos provided by the service providers are attached as Appendix H.

For more thorough findings addressing Goal 11 please see those under Goal 14 locational factor, *“Orderly and economic provision of public facilities and services.”* As the same findings apply, they will not be repeated here.

Conclusions

By using the scores of the five factors, and considering an area’s ability to meet Regional plan obligations rather than comparing properties on a parcel-by-parcel basis, the City is able to expand its UGB in a way that will provide for the orderly and economic provision of public facilities and services.

Goal 12—Transportation

Findings

Land added to the UGB through this amendment will remain under the jurisdiction of Jackson County (Urban Growth Management Agreement will apply) and will retain its current County zoning until it is annexed to the City. Prior to the annexation of any of the land added to the UGB through this amendment, a revised Transportation System Plan (TSP), which includes the areas added through this amendment, must be adopted. The revised TSP will address transportation needs throughout the entire revised UGB. Areas within the UGB but outside the City Limit must go through the annexation and the zone change process before they are assigned a standard city zone and made available for urban-level development. The City, as a criterion for zone change, requires a demonstration of facilities adequacy for transportation prior to approving any zone change that would allow for urban development. OAR 660-024-0020(d) states:

The transportation planning rule requirements under OAR 660-012-0060 need not be applied to a UGB amendment if the land added to the UGB is zoned as urbanizable land, either by retaining the zoning that was assigned prior to inclusion in the boundary or by assigning interim zoning that does not allow development that would generate more vehicle trips than development allowed by the zoning assigned prior to inclusion in the boundary.

Since all land added through this amendment will retain the zoning that was assigned prior to inclusion in the boundary, the transportation planning rule does not apply to this amendment. Transportation system needs and transportation system adequacy will be addressed both prior to annexation and through the zone change process.

Work is underway to complete a revised TSP for the city which will include a rewrite of the existing TSP.

Conclusions

The City will require that a revised Transportation System Plan (TSP), which includes the areas added to the UGB through this amendment, be adopted prior to the annexation of any of the newly added land. The revised TSP will address transportation needs throughout the entire revised UGB.

Goal 13—Energy Conservation

Findings—Energy

The Regional Plan requires the development of mixed-use/pedestrian-friendly areas. This type of development encourages the use of travel modes other than driving, leading to a reduction in vehicle miles travelled. One of the components of the coarse filter was proximity. Selecting parcels closer to the existing UGB not only helps to maximize the efficiency of public infrastructure, it has the effect of reducing energy use by reducing motor vehicle trips. A more compact urban area, with mixed-use neighborhoods, helps to promote the development and use of transit. Density and distance both play key roles in developing and maintaining public transit options. A more compact urban area also provides greater opportunities to invest in facilities for pedestrians and bicyclists, while at the same time making walking and biking more viable transportation options. The more compact urban area helps to reduce energy consumption by reducing the number of motor vehicle miles traveled; both by providing alternative modes of transportation and by reducing the distance traveled between home, work, shopping, recreation, and so forth.

Conclusions—Energy

When considering where to expand the UGB, mixed-use development and proximity have the greatest impact on the use and/or conservation of energy. The fact that the needed houses and jobs would be efficiently contained in the current urban area and in areas close to the existing UGB would have generally positive energy consequences due to the increased possibility of non-motorized travel modes between trip generators and decreasing overall vehicle miles travelled.

Goal 14—Urbanization

Findings

Refer to findings under Land Need and Boundary Location under Goal 14, above.

Conclusions

The proposed UGB expansion area meets the requirements of all Goal 14 factors.

Goals 15–19 do not apply to Medford.

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Urban Growth Boundary amendment approval criteria from Urbanization Element Section 1.2.3

Criterion a. continued: **The standards and criteria in Goal 14, OAR 660, Division 24,
and other applicable State Goals, Statutes, and Rules.**

Other applicable Statutes, and Rules

Each Comprehensive Plan element being relied upon to support this UGB amendment was found to be consistent with all applicable Statutes, and Rules at the time of its adoption. Those findings are included in the record and findings for this proposed UGB amendment, by reference.

The Statewide Planning Goals, as they apply to the proposed amendment, have been discussed in detail above. The State Statutes and Rules that apply directly to the proposed UGB amendment concern either determining land need or determining boundary location, both of which have been discussed in detail above (see “Land Need” and “Boundary Location” sections).

* * * * *

Urban Growth Boundary amendment approval criteria from Urbanization Element Section 1.2.3

**Criterion b. Compliance with Medford Comprehensive Plan policies and develop-
ment code procedures.**

City of Medford Comprehensive Plan Conclusions, Goals, Policies, and Implementation Strategies:

Findings

The following Comprehensive Plan Goals, Policies, and Implementation Strategies support the inclusion of Prescott Park and Chrissy Park in the City’s UGB:

Physical Characteristics

Policy 2-A: The City of Medford shall acknowledge Prescott Park (Roxy Ann Peak) as the City’s premier open space and viewshed, and recognize its value as Medford’s most significant scenic view, currently and historically.

Implementation 2-A(1): Investigate inclusion of Prescott Park in Medford’s Urban Growth Boundary and City limits in order to enhance public safety and the feeling of ownership by city residents, protect its natural resources, preserve and enhance convenient public access, protect the public from fire hazards, and help in establishing a network of open space corridors with recreational trails.

Implementation 2-A(2): Identify lands surrounding Prescott Park that are critical to ensuring long term protection and meeting open space/viewshed goals and policies, for acquisition or other types of public management. Seek funding sources.

Implementation 2-A(3): Consider methods to address the interface between Prescott Park and adjacent development to assure compatibility, such as a buffering program, enhanced review of City and County development applications within a specified area surrounding Prescott Park, and joint policies or an “Area of Mutual Planning Concern” with Jackson County.

Policy 2-B: The City of Medford shall strive to preserve and protect the visual amenities offered by the foothills.

Parks, Recreation, and Leisure Services

Policy 2-C: The City of Medford shall give special consideration to Prescott Park in order to protect this dynamic natural and recreational resource and most significant scenic view for the enjoyment of present and future generations.

Implementation 2-C (3): Pursue inclusion of Prescott Park in the Medford Urban Growth Boundary for eventual inclusion within the City of Medford.

Implementation 2-C (4): Increase access and public enjoyment of Prescott Park by developing appropriate facilities to enhance appreciation of natural resources, the outdoors, and Medford’s unique environment. Until included within the Medford Urban Growth Boundary, improvements within Prescott Park must comply with Jackson County land use regulations, as well as state rules and statutes, which may limit the extent of improvements on land outside of UGBs.

Solid Waste Management

Policy 1-E: The City of Medford shall assure that appropriate measures are taken to secure compatibility between the development and use of the Dry Creek Landfill and Prescott Park.

The following Comprehensive Plan Goals, Policies, and Implementation Strategies support a compact urban area with mixed-use neighborhoods:

Natural Resources—Air Quality

Implementation 3-A(3): Implement strategies from sources such as the Medford Transportation System Plan, the State Implementation Plans (SIPs) and the Oregon Transportation Planning Rule (TPR) that reduce emissions or improve air quality, such as increasing the use of alternative modes of transportation and use of alternative motor vehicle fuels, such as compressed natural gas and electricity, and propose amendments to the Medford Land Development Code for consideration by the City Council where necessary to assure compliance with such plans or rules.

Policy 3-B: The City of Medford shall continue to require a well-connected circulation system and promote other techniques that foster alternative modes of transportation, such as pedestrian oriented mixed-use development and a linked bicycle transportation system.

Health Services

Policy 1-A: The City of Medford shall strive to provide transportation, utilities, and other public facilities and services needed to support health care facilities within the Urban Growth Boundary, consistent with the health care facilities' growth requirements.

Natural resources

Policy 9-A: The City of Medford shall target public investments to reinforce a compact urban form.

Policy 9-B: The City of Medford shall strive to protect significant resource lands, including agricultural land, from urban expansion.

Natural Resources—Energy

Policy 10-A: The City of Medford shall plan and approve growth and development with consideration to energy efficient patterns of development, utilizing existing capital infrastructure whenever possible, and incorporating compact and urban centered growth concepts.

Implementation 10-A(1): Ensure that the extension of urban services is consistent with policies contained in the "Public Facilities Element" of the Medford Comprehensive Plan regarding energy efficiency.

The following Comprehensive Plan Goals, Policies, and Implementation Strategies support the use of adopted Population, Economic, Housing, and Buildable Lands Elements to determine land need:

Population Element

Policy 1: The City of Medford shall cooperate with other government agencies and the private sector to provide land and urban services sufficient to accommodate projected population growth in the UGB.

Policy 2: The City of Medford shall use the population forecast adopted in the Population Element of the Medford Comprehensive Plan as the basis for developing land use planning policy (Official population projection: 112,624 for the year 2027, and 133,397 for the year 2040.)

Economic Element

Employment Land Demand and Supply

1. This analysis indicates that additional land in the UGB is required to satisfy the City's land needs over the planning horizon.
2. The City of Medford has selected the High Employment Growth Scenario under which the City is projected to need 1,644 net buildable acres over the 20-year planning horizon and 2,055 gross buildable acres, consisting of needed acres in the following categories:
 - a. 504 net buildable acres of Office Commercial
 - b. 589 net buildable acres of Industrial
 - c. 609 net buildable acres of Retail Commercial

- d. 38 net buildable acres of Overnight Lodging
- e. 315 net buildable acres of Specialized Uses

The City has a supply of 900 acres of vacant employment land and an additional 178 net acres is expected to be available in the existing UGB to meet new demand through re-development. Based upon the adopted High Growth Scenario, the City of Medford has a deficit of 566 net buildable acres which equals 708 gross acres of employment land.

Economic Opportunities

Policy 1-5: The City of Medford shall assure that adequate commercial and industrial lands are available to accommodate the types and amount of economic development needed to support the anticipated growth in employment in the City of Medford and the region.

Implementation 1-5(b): Reduce projected deficits in employment lands by changing GLUP Map designations within the existing Urban Growth Boundary.

Implementation 1-5(c): Assist in the identification of sites for businesses that have unique site requirements.

Implementation 1-5(d): Ensure that demand projections for medium and large Commercial, Industrial and Office sites are captured in aggregate land demand projections during GLUP map amendments and/or UGB expansions.

Policy 1-7: The City of Medford will rely upon its High Employment Growth Scenario in the City's Economic Element twenty-year Employment Projections, Land Demand Projections, and Site Demand Projections when planning its employment land base.

Housing Element

6. Medford will need 1,890 net residential acres, or 2,383 gross residential acres, to accommodate new housing between 2009 and 2029. Not all of this can be accommodated within the current urban growth boundary. Therefore, Medford has a deficit of 996 gross acres in the following designations:

Implementation 1-A: When considering changes to the Medford Comprehensive Plan or Land Development Code, base such changes on the Housing Element adopted on December 2, 2010, particularly:

Housing Need Projection in Table 31

Forecast of Needed Housing Units in Table 37

Buildable Land Needed for New Dwelling Units in Table 39

Residential Land Deficit by Plan Designation in Table 41

Implementation 5-A: Maintain an inventory of areas suitable for preservation as open space.

Compliance with applicable Goals and Policies of the Regional Plan Element are discussed below:

Regional Plan Element – Implementation Measure

7. Conceptual Transportation Plans. Conceptual Transportation Plans shall be prepared early enough in the planning and development cycle that the identified regionally significant transportation corridors within each of the URs can be protected as cost-effectively as possible by available strategies and funding. A Conceptual Transportation Plan for an urban reserve or appropriate portion of an urban reserve shall be prepared by the City in collaboration with the Rogue Valley Metropolitan Planning Organization, applicable irrigation districts, Jackson County, and other affected agencies, and shall be adopted by Jackson County and the respective city prior to or in conjunction with a UGB amendment within that UR.
 - a. Transportation Infrastructure. The Conceptual Transportation Plan shall identify a general network of regionally significant arterials under local jurisdiction, transit corridors, bike and pedestrian paths, and associated projects to provide mobility throughout the Region (including intracity and intercity, if applicable).

The City has prepared a conceptual transportation plan for all of the urban reserve areas around the city. The plan identifies regionally significant transportation corridors and was developed in collaboration with the Rogue Valley Metropolitan Planning Organization, applicable irrigation districts, Jackson County, and other affected agencies. The Medford Street Functional Classification Plan Map will be amended to include the higher-order streets within the UGB expansion area.

Regional Plan Element – Implementation Measure

8. Conceptual Land Use Plans. A proposal for a UGB Amendment into a designated UR shall include a Conceptual Land Use Plan prepared by the City in collaboration with the Rogue Valley Metropolitan Planning Organization, applicable irrigation districts, Jackson County, and other affected agencies for the area proposed to be added to the UGB as follows:
 - a. Target Residential Density. The Conceptual Land Use Plan shall provide sufficient information to demonstrate how the residential densities of Section 4.1.5 above will be met at full build-out of the area added through the UGB amendment.
 - b. Land Use Distribution. The Conceptual Land Use Plan shall indicate how the proposal is consistent with the general distribution of land uses in the Regional Plan, especially where a specific set of land uses were part of the rationale for designating land which was determined by the Resource Lands Review Committee to be commercial agricultural land as part of an urban reserve, which applies to the following URs: CP-1B, CP-1C, CP-4D, CP-6A, CP-2B, MD-4, MD-6, MD-7mid, MD-7n, PH-2, TA-2, TA-4.
 - c. Transportation Infrastructure. The Conceptual Land Use Plan shall include the transportation infrastructure required in Section 4.1.7 above.
 - d. Mixed Use/Pedestrian Friendly Areas. The Conceptual Land Use Plan shall provide sufficient information to demonstrate how the commitments of Section 4.1.6 above will be met at full build-out of the area added through the UGB amendment.

The City has prepared conceptual land use plans for all areas within the urban reserve in collaboration with the Rogue Valley Metropolitan Planning Organization, applicable irrigation districts, Jackson County, and other affected agencies. The plans show land use distributions, transportation infrastructure, and mixed-use/pedestrian-friendly areas. In addition to these conceptual plans, the City will require all areas to have urbanization plans prior to annexation and the City will require applicants to demonstrate that those plans have been coordinated with applicable irrigation districts. The required urbanization plan shall show compliance with the target residential density, more detailed land use distributions, more detailed information regarding transportation infrastructure, and fully demonstrate compliance with the requirement for mixed-use/pedestrian-friendly areas.

Regional Plan Element – Implementation Measure

9. Conditions. The following conditions apply to specific Urban Reserve areas:
 - a. MD-6. Prior to incorporation into the Urban Growth Boundary, a property line adjustment or land division shall be completed for Tax Lots 38-1W-05-2600 and 38-1W-06-100 so that the tax lot lines coincide with the proposed Urban Growth Boundary.

Lots 38-1W-05-2600 and 38-1W-06-100 are not included in the UGB expansion area.

Regional Plan Element – Implementation Measure

13. Urban Growth Boundary Amendment. Pursuant to ORS 197.298 and Oregon Administrative Rule 660-021-0060, URs designated in the Regional Plan are the first priority lands used for a UGB amendment by participating cities.
 - a. Land outside of a city's UR shall not be added to a UGB unless the general use intended for that land cannot be accommodated on any of the city's UR land or UGB land.

Only land within the City's urban reserve is being considered for inclusion in the UGB.

Regional Plan Element – Implementation Measure

17. Parkland. For the purposes of UGB amendments, the amount and type of park land included shall be consistent with the requirements of OAR 660-024-0040 or the park land need shown in the acknowledged plans.

OAR 660-024-0040 (10) allows for a safe harbor net-to-gross factor of 25% for streets and roads, parks, and school facilities. Rather than use the safe harbor amount the Housing Element calculates the net-to-gross factor for streets based on observation of the existing residential areas in the city. According to the Housing Element "... the forecast shows land need in net acres. Net acres is the amount of land needed for housing, not including public infrastructure (e.g. roads). Gross acres is the estimated amount of land needed for housing inclusive of public infrastructure. The net-to-gross factor allows for conversion between net acres to gross acres. The net-to-gross factor is highest (23%) for single-family detached dwellings, decreasing to 10% for multi-unit projects." Parks and schools were not considered in the net-to-gross factor, but rather, were included in the 'Other Residential Land Needs' portion of the Housing Element, which concluded

that 153 acres of park land and 20 acres of school land were needed in the UGB expansion area.

The 'Other Residential Land Needs' section of the Housing Element examines existing conditions for public and semi-public land to forecast future need for this land type.

According to the Housing Element:

Lands needed for public operations and facilities include lands for city facilities, schools, substations, and other public facilities. Land needs were estimated using acres per 1,000 persons for all lands of these types. Lands needed for parks and open space estimates use a parkland standard of 4.3 acres per 1,000 persons based on the level of service standard established in the Medford Leisure Services Plan Update (2006). This update includes land needed for neighborhood and community parks, which usually locate in residential plan designations. It does not include land needed for natural open space and greenways, which may also be located in residential plan designations.

See Table 1.1.

A letter was submitted into the record by Greg Holmes of 1000 Friends of Oregon, dated March 3, 2015, that challenges some of the City's land need assumptions. Of the various charges of land excess in the 1000 Friends letter, the City finds that unbuildable lands and the land need for rights-of-way, parks, and schools were correctly calculated for the reasons explained in Appendix B, "Land Need".

In addition to the standard urban reserve areas the Regional Plan Element identifies two large regional park areas, MD-P Prescott and MD-P Chrissy, which contain Prescott Park and Chrissy Park, respectively. These areas are City-owned wildland parks totaling 1,877 acres. Inclusion as urban reserve was intended to serve as a mechanism to eventually incorporate this City property into the City boundary. The two MD-P areas were not considered areas for future urban growth because of their classification as parkland. There is no residential, commercial, or industrial development planned for the MD-P acres. They present a tremendous recreational and open space asset to the City and the region, in addition to creating a buffer between the city and rural lands to the north and east. However, due to their location along the eastern periphery of the city and very steep topography, these lands satisfy little of the localized open space needs throughout the city and do not meet land needs for traditional urban parkland.

Regional Plan Element – Implementation Measure

18. Slopes. Future urban growth boundary amendments will be required to utilize the definition of buildable land as those lands with a slope of less than 25 percent, or as consistent with OAR 660-008-0005(2) and other local and state requirements.

The capacity analysis that was completed for the ESAs only classified sloped land as unbuildable for those areas where the slopes exceeded 25 percent.

Regional Plan Element – Implementation Measure

20. Future Coordination with the RVCOG. The participating jurisdictions shall collaborate with the Rogue Valley Council of Governments on future regional planning that assists the participating jurisdictions in complying with the Regional Plan performance indicators. This includes cooperation in a region-wide conceptual planning process if funding is secured.

The City of Medford has continued to collaborate with the Rogue Valley Council of Governments and other participating jurisdictions since the adoption of the Regional Plan. The City will coordinate the adoption of urbanization plans for each of the areas added to the UGB through this amendment. The City will also continue to collaborate with the Rogue Valley Council of Governments on future regional planning that assists the participating jurisdictions in complying with the Regional Plan performance indicators.

Conclusions for Criterion b.

There are several Comprehensive Plan Conclusions, Goals, and Policies that support the inclusion of Prescott and Chrissy Park into the UGB. The proposed boundary location will bring both of these City-owned areas into the UGB. There are also several Comprehensive Plan Conclusions, Goals, and Policies that support a compact urban area with mixed-use neighborhoods. The efficiency measure of UGBA Phase 1 helped with both of these goals. The proposed boundary location was selected in large part because of its proximity to the existing UGB and to existing development. Areas that presented better opportunities for mixed-use development were given priority over lands that would provide for a lesser mix of uses.

The Comprehensive Plan Conclusions, Goals, and Policies support the use of adopted Population, Economic, Housing, and Buildable Lands Elements in determining land need. These adopted elements were used without modification to determine the land need for the City. In other cases the information from the elements had to be interpreted and applied in order to determine the number of acres needed in each of the GLUP categories. At other times conflicts between these adopted elements and the Regional Plan had to be reasoned through and the resulting boundary amendment is the result of balancing the existing elements to the degree possible.

The City will require areas added through this amendment to have urbanization plans prior to annexation. The required urbanization plan must show compliance with the target residential density, more detailed land use distributions, more detailed information regarding transportation infrastructure, and fully demonstrate compliance with the requirement for mixed use/pedestrian friendly areas. The remaining Regional Plan requirements have been addressed through the proposed amendment at this time.

The proposed UGB amendment and boundary location are consistent with the policies of the Comprehensive Plan.

* * * * *

Urban Growth Boundary amendment approval criteria from Urbanization Element, Section 1.2.3

Criterion c. Compliance with Jackson County's development ordinance standards for urban growth boundary amendment. Many of the findings made to satisfy subparagraph (a), preceding, will also satisfy this criterion.

Per the Jackson County Land Development Ordinance (LDO) a Type 4 Permit application will be submitted to Jackson County for the proposed urban growth boundary amendment. The proposed amendment will follow the application process of LDO Section 3.7.3(E) for UGB Amendment, which requires a legislative hearing and County Planning Commission recommendation to the Board of Commissioners.

Jackson County LDO Section 3.7.3(E) — Standards for Amending an Adopted Urban Growth Boundary, Urban Reserve Area, Urban Fringe, or Buffer Area

In addition to the requirements contained in joint Urban Growth Boundary agreements and Urban Reserve agreements, all proposed boundary and area amendments must comply with applicable State Law, Statewide Planning Goals, the County Comprehensive Plan and any Regional Problem Solving documents adopted by the County.

Findings

Findings of compliance with applicable State Law, Statewide Planning Goals, and Regional Problem Solving Documents were made under criteria a. and b. above.

Urban Growth Boundary agreements:

Urbanization Element of the City of Medford Comprehensive Plan

Appendix 1. Urban Growth Management Agreement

Compliance with the requirements contained in the joint Urban Growth Boundary agreements and Urban Reserve agreements and with the County Comprehensive Plan will be discussed below. Not all sections of the agreements apply to the proposed boundary amendment. Only applicable portions will be repeated and discussed.

3.e. If the city and county have mutually approved, and the city has adopted, conversion plan regulations for the orderly conversion of property from county to city jurisdiction, the county will require that applications for subdivisions, partitions, or other land divisions within the UGB be consistent with the city's Comprehensive Plan. Once developed, the mutually agreed upon conversion plan shall be the paramount document, until incorporation occurs.

[and]

6. The city, county and affected agencies shall coordinate the expansion and development of all urban facilities and services within the urbanizable area.

Findings

The City has prepared conceptual land use and transportation plans for all areas within the urban reserve in collaboration with the Rogue Valley Metropolitan Planning Organization, applicable irrigation districts, Jackson County, and other affected agencies. The plans show land use distributions, transportation infrastructure, and mixed-use/pedestrian-friendly areas. The plans will be adopted by the City of Medford and by Jackson County in conjunction with this UGB amendment.

In addition to these conceptual plans, the City will require all areas to have urbanization plans prior to annexation. The required urbanization plan shall show compliance with the target residential density, more detailed land use distributions, more detailed information regarding transportation infrastructure, and fully demonstrate compliance with the requirement for mixed-use/pedestrian-friendly areas.

The required urbanization plans will be adopted into the Neighborhood Element of the Comprehensive Plan and will provide a greater level of specificity than the GLUP map regarding future land use in the areas added to the UGB.

9. Long-range transportation and air quality planning for the urbanizable area shall be a joint city/county process coordinated with all affected agencies.

The City is in the process of updating its Transportation System Plan (TSP). The revised TSP will include all portions of the UGB, including areas added through this amendment. The TSP will be produced in coordination with Jackson County and must be adopted prior to the annexation of any of the areas added to the UGB through this amendment. The Medford Street Functional Classification Plan Map will be amended to include the higher-order streets within the UGB expansion area.

11. Proposed land use changes immediately inside the UGB shall be considered in light of their impact on, and compatibility with, existing agricultural and other rural uses outside the UGB. To the extent that it is consistent with state land use law, proposed land use changes outside the UGB shall be considered in light of their impact on, and compatibility with, existing urban uses within the UGB.

12. The city and county acknowledge the importance of permanently protecting agricultural land outside the UGB zoned EFU, and acknowledge that both jurisdictions maintain, and will continue to maintain, policies regarding the buffering of said lands. Urban development will be allowed to occur on land adjacent to land zoned EFU when the controlling jurisdiction determines that such development will be compatible with the adjacent farm use. Buffering shall occur on the urbanizable land adjacent to the UGB. The amount and type of buffering required will be considered in light of the urban growth and development policies of the city, and circumstances particular to the agricultural land. The controlling jurisdiction will request and give standing to the non-controlling jurisdiction for recommen-

dations concerning buffering of urban development proposals adjacent to lands zoned EFU.

Findings

The selecting of parcels close in to the existing UGB allows for the continued rural use of the properties nearer the edge of the urban reserve. The lower-intensity use of properties in the outer fringe of the urban reserve can act as a buffer between urban uses and farm and forest uses outside of the UGB.

The performance indicator of Regional Plan Element 4.1.10 requires the use of agricultural buffers to separate urban uses from agricultural uses. The City adopted City Code Section 10.802, Urban–Agricultural Conflict in Urban Reserve on August 16, 2012. This section applies to land in the urban growth boundary that is added from the urban reserve shown in the Regional Plan.

13. All UGB amendments shall include adjacent street and other transportation rights-of-way.

Findings

The City proposes to include adjacent street and other transportation rights-of-way in its UGB amendment. The City previously committed to this in the URMA and is following through with that commitment.

Urban Reserve agreements:

Regional Plan Element of the City of Medford Comprehensive Plan

Appendix C. Urban Reserve Management Agreement

5.E(i) County Roads. ...When City's UGB is expanded into the UR (Urban Reserve), County will require (e.g., through a condition of approval of UGB amendment) that City assume jurisdiction over the county roads within the proposed UGB at the time of annexation into the City regardless of the design standard used to construct the road(s) and regardless of when and how the road(s) became county roads...

...When a proposed UGB amendment will result in a significant impact to a county road(s) already within the City's limits, or existing UGB, such that the proposed amendment depends on said county road(s) for proper traffic circulation, then a nexus is found to exist between the proposed UGB expansion and said county road(s). Where such a nexus exists, the county may require, as a condition of approval, the transfer of all, or portions of, said county road(s) within the existing UGB or City's limits at the time of annexation, regardless of the design standards to which the road is constructed.

Findings

The City previously committed to this in the URMA, and is adopting similar language into the Urban Growth Management Agreement (UGMA) as a part of this amendment. The County has helped to identify areas where the proposed UGB amendment will result in a significant impact to a county road(s) already within the City's limits or existing UGB. The transfer of all, or portions, of such county road(s) is being adopted as a condition of annexation for these properties.

5.H Service Expansion Plans. As the future provider of water, sewer, parks and recreation, road maintenance and improvement, and stormwater management services in the UR, City shall prepare and update service expansion plans and these plans shall be consistent with the UGBMA between City and County. These plans provide a basis for the extension of services within the UGB and shall be referred to County for comment.

Findings

All City plans for parks, transportation, stormwater, and other services are now being amended to include the areas added to the UGB. All such plans will be coordinated with the County and shall be consistent with the Urban Growth Management Agreement.

County Comprehensive Plan

Findings

Areas added to the UGB through this amendment will remain under the jurisdiction of the County until they are annexed to the City. The UGMA will apply to these areas along with the County's Comprehensive Plan and applicable portions of the County's Land Development Ordinance. Once an area is annexed to the City the City's Comprehensive Plan and Land Development Code will apply. There are several portions of the County's LDO, which deal with special areas of consideration (listed below), that will apply to some of the areas added to the UGB through this amendment. These protections are consistent with the Statewide Goals, and the City has similar protections in place.

Section 7.1.1(B) ASC 82-2. Bear Creek Greenway

Section 7.1.1(C) ASC 90-1. Deer and Elk Habitat

Section 7.1.1(F) ASC 90-4. Historic Resources

Section 7.1.1(G) ASC 90-6. Archaeological Sites

Section 7.1.1(K) ASC 90-10. Ecologically or Scientifically Significant Natural Areas

Section 7.4.3. Urban Fringe

Section 7.4.3(F). Setbacks from Resource Lands and Reduction Requests

Section 8.6. Stream Corridors

Conclusions for Criterion c.

Jackson County's development ordinance requires a finding that UGB amendments are consistent with the requirements contained in joint Urban Growth Boundary agree-

ments and Urban Reserve agreements, and that all proposed boundary and area amendments comply with applicable State Law, Statewide Planning Goals, the County Comprehensive Plan and any Regional Plan documents adopted by the County. Compliance with applicable State Law, Statewide Planning Goals, and Regional Plan documents has been discussed in the findings for criteria a. and b. above.

The proposed UGB amendment has also been shown to be consistent with the Urban Growth Management Agreement, the Urban Reserve Management Agreement, and the County's Comprehensive Plan. By showing compliance with these and applicable State Law, the City has demonstrated compliance with Jackson County's development ordinance standards for urban growth boundary amendment.

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Urban Growth Boundary amendment approval criteria from Urbanization Element Section 1.2.3

Criterion d. Consistency with pertinent terms and requirements of the current Urban Growth Management Agreement between the City and Jackson County.

Findings

Consistency with pertinent terms and requirements of the current Urban Growth Management Agreement between the City and Jackson County is discussed under Urban Growth Boundary agreements and Urban Reserve agreements in the findings for criterion c. above.

Conclusions

See conclusions for criterion c. above.

* * * * *

SUMMARY CONCLUSIONS

1. In order to accommodate its 20-year land need for housing, employment, and other urban uses, the City should expand its UGB by 1,669 acres in the locations identified on the Exhibit C large-scale map and also on the small map on page 6 of Exhibit A.
2. The land need identified by the City is based upon reasonable assumptions, analysis, and conclusions about the City's projected growth in residents, jobs, and other urban uses, including roads, schools, parks, open space, and public facilities.

3. The City considered alternative boundary locations and determined that the selected expansion area does not include any lower priority lands and will efficiently accommodate the City's identified land needs; allow for the orderly and economic provision of public facilities and services; result in comparatively favorable environmental, social, economic, and energy consequences; and will be compatible with nearby agricultural and forest activities. The Council required commitments to perform from several land owners in inclusion areas in order to substantiate some of the ESEE findings. Those commitments are documented as prerequisites to annexation in the updated Annexation Policies (Exhibit A) and the written commitments are collected in Appendix M.
4. The amendment is based on all of the City's Comprehensive Plan Elements, including the Housing Element, which are post-acknowledgment plan amendments that have been adopted according to our state land use laws and regulations. As the adopted elements, they form the basis by which the City can make its decisions.
5. Reliance on adopted plans thwarts the increase in regional sprawl that has occurred over the past decade. Considering this amendment as an extension of the Regional Problem Solving process, the City of Medford has been involved in expansion of its urban area for over fifteen years. With a full commitment to that process, the City has invested considerably in not only time, but money and goodwill to following the best practices of land planning. In that time, other cities have grown disproportionately to Medford due to the City's lack of available housing stock and options. While Medford suffers from increased congestion from others in the region, following the City's adopted plans will accommodate the need for housing at higher density levels than in the past, provide a balance of housing types to accommodate a wider range of price accessibility, and regionally support the reduction in vehicle miles travelled and greenhouse gas emissions.
6. All lands considered for inclusion are within the urban reserves, and as such, classified as first priority for inclusion in a UGB. Also, all were fairly considered under Goal 14 evaluation factors, but it is acknowledged that the relative value of each of the included lands cannot be evaluated in purely objective or financial terms. Some areas, such as MD-7 and 8 have easy access to utilities and transportation, but also provide a distribution of land to be included throughout the city. Others, such as MD-5 East are essential to achieving goals deemed a priority for the City; specifically critical bike path connections from eastside park land that will connect to the regional greenway. Whether it is providing areas for aging in place to accommodate the anticipated doubling of the elderly population, or resolving existing enclave issues, each area to be included in this option has particular value for the City of Medford.

7. Finally, while the testimony and evidence provided to the community has been voluminous, the chosen expansion option has come with the most support and concessions of the affected property owners and as such best complies with Statewide Planning Goal 1 – Citizen Involvement. Credit should be given to all who worked or volunteered their time on this process as the Council believes that it meets all the overarching principles guiding land use in Oregon and specifically provides for a healthy environment, sustains a healthy economy, ensures a desirable quality of life, and has equitably allocated the benefits and burdens of land use planning.

APPENDICES

- A Available Land
- B Land Need
- C 1000 Friends of Oregon letter, dated 3/3/2015
- D UGBA Phase 1 effect on land supply
- E Coarse filter maps
- F External Study Area (ESA) and Capacity in ESA maps
- G Additional scoring maps
- H Infrastructure scoring memos
- I Transportation memo
- J Conceptual Plan
- K List of written testimony received during Council hearings
- L Excerpted Minutes from City Council meetings
- M Written Commitments

APPENDIX A. AVAILABLE LAND

The purpose of the Buildable Lands Inventory (BLI), completed by the City in 2008, was to inventory the number and location of acres available for development within the existing UGB by individual land type.

RESIDENTIAL

The Buildable Lands Inventory concluded that residential land was available within the existing UGB in the following amounts: Urban [Low-Density] Residential (UR) = 2,385 acres, Urban Medium-Density Residential (UM) = 49 acres, and Urban High-Density Residential (UH) = 158 acres.

Table 2.1. Residential Land Supply (adapted from Housing Element Table 30)

Plan Designation	Supply (acres)	Plan Description
UR	2,385	Low-density Residential, 4–10 units/acre
Vacant	1,703	
Partially Vacant	419	
Redevelopable	263	
UM	49	Medium-density Residential, 10–15 units/acre
Vacant	35	
Partially Vacant	6	
Redevelopable	8	
UH	158	High-density Residential, 15–30 units/acre
Vacant	132	
Partially Vacant	14	
Redevelopable	13	
Total Residential	2,592	

The supply of residential land was changed through UGBA Phase 1. In many cases low-density residential land was converted to either medium-density or high-density. In other instances residential land was converted to employment land. The end result was a more efficient use of land within the existing UGB which resulted in a need of 92 fewer acres outside of the existing UGB. The resulting residential land supply after UGBA Phase 1 is shown below in *Table 2.2*.

Table 2.2. Residential Land Supply after UGBA Phase 1

Plan Designation	Supply (acres)	Plan Description
UR	2,215	Low-density Residential, 4–10 units/acre
Vacant	1,669	
Partially Vacant	371	
Redevelopable	174	

UM	121	Medium-density Residential, 10–15 units/acre
Vacant	43	
Partially Vacant	30	
Redevelopable	48	
UH	215	High-density Residential, 15–30 units/acre
Vacant	138	
Partially Vacant	28	
Redevelopable	49	
Total Residential	2,550	

EMPLOYMENT

The Buildable Lands Inventory concluded that employment land was available within the existing UGB in the following amounts: Service Commercial (SC) = 172 acres, Industrial (GI & HI) = 641 acres, and Commercial (CM) = 265 acres.

Table 2.3. Employment Land Supply (adapted from Economic Element Figure 28)

Plan Designation	Supply	Plan Description
SC	172	Service Commercial: office, services, medical
GI & HI	641	General & Heavy Industrial: manufacturing
CM	265	Commercial: retail, services
Total Employment	1,078	

The supply of employment land was changed through UGBA Phase 1. In several cases industrial land was converted to commercial and in other instances residential land was converted to commercial. The end result was a more efficient use of land within the existing UGB which resulted in a need of 92 fewer acres outside of the existing UGB. The resulting employment land supply after UGBA Phase 1 is shown below in *Table 2.4*.

Table 2.4. Employment Land Supply after UGBA Phase 1

Plan Designation	Supply	Plan Description
SC	174	Service Commercial: office, services, medical
GI & HI	519	General & Heavy Industrial: manufacturing
CM	443	Commercial: retail, services
Total Employment	1,136	

APPENDIX B. LAND NEED

RESIDENTIAL

The City adopted the Housing Element of the Comprehensive Plan in December 2010. The Housing Element built on the conclusions of the Population Element (Nov 2007) and the Buildable Lands Inventory (Feb 2008). Over the 20-year period from 2009 to 2029 a total of 15,050 new dwelling units are needed in Medford. The available supply of residential land within the UGB is expected to accommodate 11,424 of those dwelling units leaving a need for 3,626 dwelling units to be provided for outside of the existing UGB. Of the dwelling units needed outside of the existing UGB, 2,233 are needed in UR, 498 are needed in UM, and 894 are needed in UH. To accommodate the needed dwelling units outside of the existing UGB 553 gross acres are needed using the following needed (gross) density factors: 4.8 dwelling units per acre for UR, 12.8 dwelling units per acre for UM, and 18.1 dwelling units per acre for UH. *Table 3.1* summarizes the residential land need.

Table 3.1. Residential Land Need (adapted from Housing Element Table 39)

GLUP Designation	Dwelling Units Needed ¹⁴	Dwelling Unit Capacity	Dwelling Unit Deficit	Expected Density (gross)	Needed Buildable Acres (gross)
UR	10,036	7,803	2,233	4.8	465
UM	993	495	498	12.8	39
UH	3,329	2,435	894	18.1	49
Total					553

Group Quarters, such as dorms, jails, social service facilities, and nursing homes, are typically built in high-density and commercial zones. The Housing Element estimates that of the increased population over the 20-year period, two percent, or 712 people, will be housed in group quarters. Since these facilities are typically built in high-density and commercial zones the UH density of 18.1 dwelling units per acre was used, along with the average household size, to calculate a need of 16 acres of land for group quarters. This land was then allocated to the UH land demand bringing the total need for UH up to 66 acres and the total residential land need up to 570 acres.

¹⁴ In the Housing Element a portion of the dwelling unit need and the dwelling unit supply was shown to exist on commercial acreage. The portion of the residential need existing on commercial land was not used to calculate density or the number of acres needed to meet the housing demand, because the residential component on commercial land was assumed to exist in addition to a commercial use on that property.

Table 3.2. Acres for Group Quarters (adapted from Housing Element page 27 and Table 41)

	Group Quarters	Needed Acres
UR	0	465
UM	0	39
UH	16	66
Total		570

The Housing Element also included a calculation for needed public and semi-public land. These uses include parks, schools, churches, and fraternal lodges. The study concluded that there are roughly 17 acres of public and semi-public land for every 1,000 people in the existing UGB. The study assumed a need of 11.6 acres of public and semi-public land for every 1,000 people added to the population of Medford. Given the projected population increase of 35,591 people a total of 426 acres is needed for public and semi-public uses over the 20-year planning period. This land was allocated to the three residential land types based on the percentage of dwelling units needed for each type. The inclusion of the public and semi-public land need is summarized in *Table 3.3*.

Table 3.3. Public and Semi-Public Lands (adapted from Housing Element Tables 40 & 41)

	Public and Semi-Public	Total Acres Needed
UR	298	763
UM	29	68
UH	99	164
Total	426	996

When the supply of residential land was changed through UGBA Phase 1 (see *Tables 2.1* and *2.2*) the amount of land needed in each of the residential GLUP designations was also changed. With more of the high-density and medium-density need being met within the existing UGB, fewer acres of each of those land types need to be added. Conversely, since some of the low-density residential land supply has been displaced from within the existing UGB, a greater amount must now be added through the UGB amendment process. While UGBA Phase 1 resulted in a 58-acre conversion of land from residential to employment GLUP designations the total residential land need only increased by 36 acres. This is due to the fact that some of this land was not identified as meeting any portion of the future residential land need (because it was classified as developed) but it is now being counted toward meeting the employment land need (because it is expected to redevelop as commercial). *Table 3.4* shows the amount of residential land needed both before and after UGBA Phase 1.

Table 3.4. Residential Land Need before and after UGBA Phase 1

GLUP	Needed Acres Before Phase 1	Needed Acres After Phase 1
UR	763	885
UM	68	27
UH	164	120
Total	996	1,032

EMPLOYMENT

The City adopted the Economic Element of the Comprehensive Plan in December 2008. The Economic Element built on the conclusions of the Population Element (adopted November 2007) and the Buildable Lands Element (adopted in February 2008). Over the 20-year period from 2008 to 2028 a total of 1,645 acres of employment land is needed in Medford. The Economic Element did not use the General Land Use Plan (GLUP) designations used by the City to classify employment land by type, but rather specifies the need for Office Commercial, Industrial, and Retail Commercial land. The Retail Commercial need can only be met in the Commercial (CM) GLUP designation because retail is only permitted within zoning districts allowed in CM. The Industrial need will be met in the General Industrial (GI) and the Heavy Industrial (HI) GLUP designations. The Office Commercial need will be met in both the CM and Service Commercial (SC) GLUP designations, which both allow for offices within their respective zoning types. Because the SC GLUP is intended to provide primarily for employment/office uses, such as business offices and medical offices, both the medium-size and large-size office site need is assigned to the SC GLUP designation. The small-size office site need is expected to be met by fill-in development, mixed with other commercial uses. This type of development is most appropriately accommodated within the zoning types permitted in the CM GLUP designation and is assigned to CM for land need.

In addition to the standard employment land categories the Economic Element identified a need for 284 “Other” acres, comprising 31 acres for overnight lodging and 253 acres for specialized uses. Since the “Other” acres need to be put into a city land use designation, and since the Economic Element did not do so, it is necessary to distribute those acres. Since about 9/10 of the “Other” category is described as “campus-type development,” and since that type of development would only be a permitted use in the Industrial and the Service Commercial designations, a two-way partition (126 acres each) into those is appropriate. The other 31 net acres in the “Other” category are for overnight lodging; which are typically permitted in the CM designation.

Table 3.5. Conversion of Economic Element Designation to GLUP Designation (adapted from Economic Element Figure 28)

Use Type	Demand in Net Acres	Allocate Overnight and Specialized	Total Demand in Net Acres	GLUP Need in Net Acres
Office Commercial	404	126	530	SC = 352
Industrial	471	126	597	GI & HI = 597
Retail Commercial	488	31	519	CM = 697
City Residents	248			
Region/Tourists	240			
Overnight Lodging	31			
Specialized Uses	253			
Total	1,645		1,645	1,645

When we compare the supply of employment land, 1,078 acres (see *Table 2.3*), against the total demand, 1,645 acres (see *Table 3.5*), we see a deficit of 567 acres over the 20-year period. The Economic Element adds 25% to net acres to convert to gross acres, as recommended in DLCD Goal 9 guidebook, to account for streets and other infrastructure needs. The total employment land need is 709 acres when converted to gross acres.

However, this comparison of the overall supply of employment land against the overall demand does not provide an accurate representation of the employment land need for the City. When we compare the land need against the supply of land by employment GLUP type, we see that there is a 44-acre surplus of industrial land within the existing UGB over the 20-year period (*Table 3.6*). Since this surplus (if left in the industrial GLUP designations) does not help to meet the commercial land need, the actual need for employment land is 612 net acres, which converts to 765 gross acres. This is the true employment land need for the 20-year period.

Table 3.6. Employment Land Need in Net Acres

GLUP	Supply	Demand	Deficit (surplus)	Deficit for Land Need
SC	172	352	180	180
GI & HI	641	597	(44)	0
CM	265	697	432	432
Total				612

Table 3.6 shows that there is a surplus supply of industrial land within the existing UGB over the 20-year period. In accordance with ORS 197.296 subsection (6) the City undertook UGBA Phase 1 to increase the developable capacity of the urban area. This was done primarily by converting surplus industrial land to commercial land. It was also done by converting some residential land that was not identified as meeting any of the future residential land need to employment land that is now meeting some of the identified employment land need. Unlike with the residential land need, which increased by 36

acres based on the 58-acre change from residential to employment, the employment land need decreased by 58 acres based on those conversions.

As shown in *Table 3.7*, UGBA Phase 1 resulted in the addition of approximately two acres of SC land, bringing the total supply to 174 acres, and decreasing the deficit to 177 acres. UGBA Phase 1 added approximately 178 acres to the CM land, bringing the total supply to 443 acres, and decreasing the deficit to 254 acres. UGBA Phase 1 converted approximately 122 acres of GI & HI land, bringing the supply of land down to 519 acres, and changing the 44-acre surplus of land to a 77-acre deficit. By increasing the developable capacity of employment lands within the existing UGB, as recommended by ORS 197.296 (6), the City reduced its overall need for employment land from 765 gross acres to 637 gross acres, a difference of 128 gross acres.

Table 3.7. Employment Land Need after UGBA Phase 1 (net acres)

GLUP	Supply Before Phase 1	Supply After Phase 1	Demand	Deficit
SC	172	174	352	177
GI & HI	641	519	597	78
CM	265	443	697	254
Total				509

The number of net acres needed is then converted to gross acres in order to account for roads and other infrastructure resulting in a total employment land need of 637 gross acres.

Table 3.8. Net-to-Gross Conversion of Employment Land Need after UGBA Phase 1

GLUP	Deficit in Net Acres	Deficit in Gross Acres
SC	177	222
GI & HI	78	97
CM	254	318
Total		637

RESPONSES TO 1000 FRIENDS LETTER

The 3/3/2015 letter from 1000 Friends of Oregon (Appendix C) contended that the City committed a number of errors in its land need calculations, including that the City double-counted 18 acres of private park land need and 135 acres of land for government uses, causing the City to overstate its projected land needs over the planning period by 153 acres. The Council concludes that the City has not double-counted these lands, for the reasons explained earlier in the findings. The Council denies 1000 Friends' remaining land need contentions for the reasons explained below.

OVERLAP—PARKS AND “UNBUILDABLE”

Explanation

1000 Friends of Oregon contends that the City overstated its land needs by adding buildable land to the proposal to meet the need for parkland that would actually be met on unbuildable lands.

Analysis

The Council denies 1000 Friends’ contention for four reasons.

First, the Council finds that the need for parks identified in the Housing Element is land for “neighborhood and community parks” and not land for “natural open space and greenways.” See Housing Element at 62-63. As a result, the Council finds that the identified need is for more active parkland, which in most cases, cannot be accommodated on the types of lands that qualify as unbuildable (e.g., wetlands, steep slopes, developed).

Second, the assertion that a portion of the City’s identified park need should be shown as being met on acreage that has been classified as unbuildable assumes that unbuildable lands will be available for park facilities development. The City does not own any of the land that has been identified as unbuildable in the capacity analysis for the urban reserve. In order for this land to meet any portion of the identified park need the City would have to purchase or otherwise acquire the land.

Third, although the City of Newberg’s UGBA was remanded in part because the city did not show an overlap between unbuildable land and identified park needs, the Council finds that the Newberg case is distinguishable. *Friends of Yamhill County v. City of Newberg*, 62 Or LUBA 211 (2010). In that case, the City of Newberg classified at least a portion of the land within the floodplain as unbuildable. The court determined that some of the park needs, including sports fields, could be expected to be met within the floodplain. Because of this, Newberg should have counted a portion of its park land need as being met within the unbuildable lands, specifically within the floodplain. For the Medford UGBA, however, staff did not classify any floodplain as “undevelopable.”

Floodplains have certain development standards that must be adhered to when developed, but because these areas are developable when those standards are met, they have not been counted as unbuildable in the capacity analysis for the urban reserve. Since all of the floodplain, unless it is within a riparian corridor or an identified wetland, is counted as buildable, the circumstances of the Newberg case do not apply to Medford’s proposal.

Even if the City chose to say that a portion of the park need would be met on the unbuildable acreage being included in the UGB, there is no way to determine how large this overlap should be. Will all trail development occur within riparian corridors, steep slopes, and wetlands? Any acreage value one assigned would only be a guess and there-

fore could easily be challenged as being either too large or too small. It probably cannot be more than one or two dozen acres.

Fourth, the methodology used for the capacity analysis for the urban reserve was consistent with the methodology used for the buildable lands inventory and consistent with OAR 660-024-0050 and ORS 197.186 and 197.296. The capacity analysis did not count anything as unbuildable that was not supported by state statute but may have undercounted the unbuildable acreage by not counting any portion of the floodplain as unbuildable. For these reasons, staff believes the separation of the unbuildable acres and the identified park need is appropriate and will help to insure that an adequate supply of developable land will be available for needed park and recreation development for the 20-year period.

EXCESS OF “OTHER LAND NEEDS”

Explanation

The 1000 Friends letter also points out that cities may use a regulatory “safe harbor” net-to-gross factor of 25 percent for housing (net x 1.25). The purpose of this factor is to add acres to the net need for rights-of-way, parks, and schools¹⁵. The letter says that the Housing Element used a net-to-gross factor greater than 100 percent (net x 2.00). It concludes that the Element does not justify using a figure so much in excess of the safe harbor.

A response letter from Michael Savage, CSA Planning, dated March 26, 2015, states that Medford, as a city with a population greater than 25,000, cannot use the safe harbor method. However, staff can find nothing in the OAR that prohibited the City from using the safe harbor if it had chosen to do so.

Analysis

The safe harbor was not used by the consultants who performed the housing needs analysis. Instead, for rights-of-way they analyzed existing development to determine typical net-to-gross factors for various densities¹⁶, and applied those proportionally. For parks and schools the consultants determined the existing supply ratios (in acres per thousand people), and adjusted those ratios downward for the next 20 years to accommodate an expected 35,591 new inhabitants¹⁷.

The resulting additional land need is in the following table. The middle column shows the acres needed by type to serve residential development. The rightmost column shows the percentage over net need for each type and in total.

¹⁵ OAR 660-024-0040 (10).

¹⁶ See Table 37 in Housing Element

¹⁷ See p. 10 in Housing Element

Type	Acres	Percent over Net Land Need
Rights-of-way	98	22%
Parks	153	34%
Schools	20	4%
Total	271	60%

However, the amounts are adjusted downward by adding in additional supply: 19 acres for parks and 26 acres for schools.

Type	Acres	Percent over Net Land Need
Rights-of-way	98	22%
Parks	134	30%
Schools	—	0%
Total	232	51%

Note the difference between the 1000 Friends argument and the figures above. The letter compares 524 acres¹⁸ to 455 acres. It errs in summing all those acres because it is not comparing the same categories.

The regulatory safe harbor comprises only three land use categories: rights-of-way, parks, and schools. In a comparison of just those three types the Housing Element's calculation results in a net-to-gross factor that is double the Administrative Rule amount (51% versus 25%). The figure is undeniably much larger than the safe harbor amount, but nonetheless it is based on an analysis of what has been built in existing residential areas, and it makes the correct move of reducing the provision ratios for parks and schools¹⁹.

The amount of land used by streets, schools, and parks can vary widely from community to community, but in staff's experience the percentage taken up by streets alone is usually around 20 percent, so the OAR safe harbor appears parsimonious. The City's figure was derived rationally and is a reasonable estimate of need.

FURTHER CHALLENGES TO CALCULATION OF "UNBUILDABLE"

Although DLCD contended that the City overstated the amount of unbuildable lands in the expansion area, the Council denies this contention for the reasons explained in the

¹⁸ 524 acres = "public & semi-public" + rights-of-way (426+98).

¹⁹ Housing Element, table 40. Parks were reduced from 6.8 to 4.3 per thousand. Schools were reduced from 3.4 to 0.6 per thousand. The rationales for the reductions are explained on p. 63 of the Housing Element.

Supplemental Findings memo no. 3 and for the reasons set forth in the letter from Perkins Coie LLP dated September 17, 2015.

Although 1000 Friends of Oregon contended that the agricultural buffer areas should not be classified as unbuildable, the Council denies this contention for four reasons. First, the agricultural buffers are not “buildable.” A “Net Buildable Acre” is “43,560 square feet of residentially designated buildable land after excluding future rights-of-way for streets and roads” (OAR 660-024-0010(6)). Further, “buildable land” is land considered “suitable, available, and necessary” for residential uses as required by ORS 197.295(1) and OAR 660-008-0005(2) (which is incorporated by reference in OAR 660-024-0010(1)). The Council finds that the agricultural buffers are not “suitable, available and necessary” for residential development because they must remain undeveloped in accordance with Medford Municipal Code §§10.801–802 in order to minimize the impacts of urban development on agricultural production activities. Further, the Council finds that the City will designate the buffer areas as “open space;” therefore, they will not be “residentially designated” as required by the definition of “Net Buildable Acre.”

In addition, if the agricultural buffers must be accommodated on “buildable lands,” it will leave the City with an inadequate supply of “buildable lands” because the City did not factor the need for agricultural buffers into its buildable land needs analysis. As support for this conclusion, the Council relies upon City staff’s Supplemental Findings memo no. 3 dated October 1, 2015.

Finally, although it is potentially permissible to develop roads or trails in the agricultural buffers, the circumstances when these uses are permitted in these locations is limited. For example, a road may only bisect a buffer if the alignment is unavoidable (MMC 10.802.N(3)). Further, trails and linear parks are themselves urban receptors, meaning they will require additional buffers from agricultural lands too (MMC 10.802.B (6)). Therefore, the Council finds that, as a general rule, it is not reasonable to consider the agricultural buffers as “buildable.” Further, the Council finds that the few circumstances when these buffers could accommodate a road or trail are reflected in the reduced buffer acreage resulting from applying the modified methodology.

For these reasons, the Council finds that the modified agricultural buffer acreage is correctly classified as unbuildable, and the overall expansion is correctly adjusted by a like amount upward to compensate.

APPENDIX C. 1000 FRIENDS OF OREGON LETTER



133 SW Second Ave, Suite 201 • Portland, OR 97204 • (503) 497-1000 • fax (503) 223-0073 • www.friends.org
Southern Oregon Office • PO Box 2442 • Grants Pass, OR 97528 • (541) 474-1155 • fax (541) 474-9389
Willamette Valley Office • PO Box 51252 • Eugene, OR 97401 • (541) 520-3763 • fax (503) 223-0073

March 3, 2015

Joe Slaughter, Planning Department
and the Medford Planning Commission
City of Medford, Lausmann Annex
200 South Ivy Street
Medford, OR 97501

RECEIVED
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PLANNING DEPT.

Subject: File No. CPA-14-114, UGBA Phase 2, ESA Boundary Amendment

Dear Mr. Slaughter, and members of the Planning Commission:

Thank you for the opportunity to provide these comments regarding a proposed amendment to Medford's Urban Growth Boundary (UGB). 1000 Friends of Oregon is a nonprofit, charitable organization dedicated to working with Oregonians to enhance our quality of life by building livable urban and rural communities, protecting family farms and forests, and conserving natural and scenic areas. We have many members and supporters in Jackson County and the city of Medford.

This testimony is divided into two sections. The first includes some general observations regarding the ESA process and the staff proposal as we understand it today. That is followed by specific recommendations based on our review of the material on the city's website, the 2008 Economic Element, the 2010 Housing Element, and relevant portions of the Regional Plan Element of the Medford Comprehensive Plan. These comments are necessarily general and preliminary in nature. We anticipate more comments will be forthcoming once the staff report and supporting documentation become available for public review.

General Comments Regarding the ESA Concept and Boundary Amendment Proposal

As the Southern Oregon Advocate for 1000 Friends of Oregon since 2002, I have been intimately involved in the planning efforts in Jackson County and Medford for over a decade. I participated extensively in the RPS process, eventually supporting Medford's adoption of that plan, and also supported the city's adoption of the UGBA Phase I GLUP map amendments.

I have been following Phase 2—including monitoring the technical analysis, reviewing publicly available documents, and meeting with staff and a number of property owners and their representatives. The following general comments are made with that background as context. They are divided by subject into comments regarding what the proposal looks like and how big the proposal is.

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Overall the Staff Proposal appears to be technically sound

1000 Friends of Oregon monitors UGB expansion proposals across the state. With the exception of the amount of land (as described below), information that is currently publicly available suggests that the staff's technical analysis in this case has resulted in a fundamentally sound proposal from which to begin the public hearings process.

As noted in the Housing Element of 2010,¹ Medford has already adopted a number of policies that result in increasing the efficiency with which the city uses land. Those policies, combined with the GLUP designation changes that occurred during Phase I of this project, form a solid basis from which to evaluate the future needs of the city.

The technical analysis that was performed in the fall of 2014 provided good information for ranking the relative merits of urban reserve areas and allowed objective comparison between them.² The resulting pattern of areas to include in the current expansion proposal appears to have correctly removed a number of areas from consideration this round due to lack of proximity to existing UGB areas and the expense of providing water, sewer and transportation infrastructure that would be needed to serve those areas.

The proposal being forwarded to the Planning Commission can provide a number of benefits to the community, including:

- Spreading the development around geographically also spreads the impacts that concentrated growth could have if it were concentrated in a few areas or regions of the city.
- Spreading the types and locations of land available increases the options for the city and helps meet diverse needs. More types of land increase the likelihood that needs identified in supporting documents, such as the need to provide more affordable housing noted in the Housing Element,³ can be met. Spreading the ownership of land increases the variety of building that can be expected, and decreases the chances that a small number of property owners can control land prices or the pace of development.
- Including more areas that are spread around the city and for the most part directly adjacent to existing built areas decreases the amount of land that is farther away from existing services, thus decreasing the cost to developers and the city of extending utilities and services into new development.
- Over the long term, keeping development closer to the existing utilities and services that already reach the edges of the existing UGB will prove to be the fiscally

¹ Medford Comprehensive Plan, Housing Element, pages 3-8.

² Information regarding this analysis and the resultant rankings is available at <http://www.ci.medford.or.us/Page.asp?NavID=2140>

³ The Housing Element identified a current shortage of 4,450 housing units affordable for existing households in Medford at page 44. In order to comply with Statewide Planning Goal 10 and Medford's own Comprehensive Plan, Medford's UGB proposal must include measures for addressing the current and future affordable housing needs. The GLUP redesignation in Phase I of this process could meet part of that need. The dispersed pattern for expansion in the staff's proposal could be argued to help meet that need as well.

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conservative approach to new development, as the city will be on the hook for operations and maintenance of facilities that the current tax base cannot support. This, combined with Medford's changes to GLUP designations within the existing UGB during Phase I, will likely save the city millions of dollars in the future.⁴

Overall, the technical analysis supporting the shape and location of lands suggested for inclusion in the UGB expansion appears sound and has produced a good proposal for starting the public hearings process.

However, the amount of land within the proposal will need to be scaled back in order to comply with applicable requirements.

There is reason to question the stated amount of land needed

The purpose of an urban growth boundary assessment is to ensure that a city has enough developable land to accommodate 20-years of projected population growth.⁵ The city assesses the capacity of undeveloped or redevelopable land within its boundaries and has the option to either 1) change the proposed uses of those lands to increase efficiency, 2) add more land, or 3) take a combined approach, to make sure its projected needs can be met.

Medford is choosing option 3. After making adjustments to increase the efficiency of the planned uses of lands already in the UGB, the city has calculated additional needs.

Medford also has urban reserves, which when combined with the undeveloped or redevelopable land within its current UGB are meant to represent a 50-year supply of land. According to the Regional Plan Element of the Medford Comprehensive Plan, Medford's current UGB contains about 2,592 acres of available land designated for residential use and another 1,054 acres of available land for employment use, for a total of about 3,646 acres of land available to help meet future needs.⁶ In addition, during RPS the city added about 4,194 acres of land for residential and employment needs to their urban reserve areas.⁷

Thus, Medford has within its current UGB and its urban reserve areas about 7,840 acres of available land to meet its 50 year projected need.⁸ A full 20-year UGB might reasonably be expected to contain about 40 percent of that total number of acres. (20/50 years = 40%)

⁴ See Attachment A, excerpt from "More Extensive is More Expensive, for case studies suggesting the magnitude of this savings. For the full report, see www.friends.org/infrastructure.

⁵ In addition to being good policy for accommodating future population increases, ORS 197.296 requires that cities maintain a 20 year supply of developable land within its UGB. State law also mandates that the UGB contain no more than a 20 year supply.

⁶ Medford Comprehensive Plan, Regional Element, Figure 3.1-1.

⁷ Medford Comprehensive Plan, Regional Element, Figure 3.1-1.

⁸ The urban reserves also contained 1,877 acres of land within Chrissey and Prescott Parks, which are proposed to be included in the current UGB expansion. We have no objection to that land being included in the UGB, and it is not included in the calculations here or elsewhere in this testimony unless specifically stated otherwise.

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A simple check shows that the current proposal includes substantially more than that. As noted above, the current UGB includes about 3,646 acres of available land. ALL of that must be included in these calculations. According to the city's website, the current proposal includes about 1,669 acres of urban reserve for inclusion in the UGB.⁹ This totals 5,315 total acres, or about 68 percent of the total available land in the existing UGB and urban reserves. This is far more than any reasonable margin of error, and absent explanation suggests that there is more land in the current proposal than can reasonably be justified. If the total amount of land cannot be justified, some will have to be removed from the proposal.

It turns out, as will be discussed below, that there are some errors in the documents that provided the base assumptions that the staff calculations are based on that have resulted in an overstatement of the number of acres needed in the expansion areas. These errors should be remedied early in the public process so that expectations regarding how much land can reasonably be included in the proposal remain realistic.

Comments Arising From Review of the Staff Proposal

A UGB evaluation (and, if necessary, expansion) is supported by a number of required elements. The entire enterprise is based on a population forecast. (Medford's forecast for this project was adopted locally in 2007). The city then must inventory the lands available within its existing UGB. (The Buildable Lands Inventory was adopted locally in 2008.) The city then conducts a needs assessment for land to accommodate projected employment (Economic Element, adopted locally in 2008) and housing needs (Housing Element, adopted locally in 2010). These documents contain the data and assumptions that go into determining the amount of land to be included in a UGB expansion.

Normally all of these elements are a part of the UGB expansion proposal that is sent to the state for approval, or "acknowledgment." The UGB expansion proposal must be consistent with those foundation documents.

In this case, Medford sought acknowledgement of some of these documents prior to completing the entire process. When the Housing Element was submitted, DLCD rejected it as incomplete.¹⁰ That document, at a minimum, will be subject to review by the state when this process is completed locally. That process makes sense: sometimes the ramifications of assumptions in these foundation documents are not clear until it can be seen how they will impact the later UGB expansion proposal—whether that result is due to faulty internal assumptions or conflicts with other foundation documents. In this case, there are problems both within the Housing Element and between that document and the Economic Element that

⁹ <http://www.ci.medford.or.us/Page.asp?NavID=2140>

¹⁰ See Attachment B, letter from Richard Whitman, Director, to Jim Huber, Planning Director, January 5, 2011.

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result in double-counting of land need, and thus an overstatement of the number of acres to be included in the proposal.¹¹ Those problems, and their ramifications, are discussed below.

It should be noted that these comments are based on documents that are currently available for public review. It is anticipated that other issues may become apparent when the staff report and supporting documentation become available for public review (which we understand will happen when the packet containing this letter is sent to the Planning Commission for their hearing). We will continue to monitor information as it becomes available and will comment as appropriate.

For the time being we offer the following observations and suggestions.

Unbuildable land was improperly excluded from consideration in parks and open spaces, resulting in overstated land needs

The land needed to meet future housing and employment needs must be land that can be built on—i.e., it cannot be on excessively steep slopes, in floodways, or in certain riparian corridors. It is reasonable to add additional acres to a proposal to meet these needs when unbuildable land is intermingled with the land being considered for inclusion.

However, parks and open-space areas routinely include unbuildable land. The Bear Creek Greenway is a local example.

In the current proposal, 402 acres of land within urban reserve areas were identified as “already developed or unbuildable” and removed from consideration prior to calculating all land needs. The result was that 402 acres of additional buildable land were added to meet the stated needs. That is appropriate in the case of land that will be used for residential or employment uses.¹² However, there is unbuildable land in the proposal that is already identified to be used for parks and open space, so that portion of the 402 acres should not be offset by adding more buildable land. Examples of this appear to include ponds and riparian corridors that are identified to be part of parks or greenways.

UGB proposals have been remanded by LUBA for double-counting the amount of parkland needed due to the assumption that parkland must be buildable.¹³

To the extent that buildable land was added to the proposal to meet park needs that will clearly be met on unbuildable lands, that excessive buildable land should be removed from the proposal.

¹¹ DLCD has made it clear to the city on numerous occasions that all of the foundation documents are subject to review when the city sends the entire UGB package to the state for acknowledgement. A local argument has been developed that, once acknowledged, those documents are not subject to review again. We disagree. Regardless, the Housing Element has clearly NOT been acknowledged, and is subject to question in this process.

¹² It is also reasonable for land that is truly developed and not expected to redevelop during the 20 year period.

¹³ For example, see *Friends of Yamhill County vs City of Newberg*, LUBA No. 2010-034, p. 5, where Newberg’s UGB proposal was remanded in part because of this assumption and the resulting over-estimate of land included in the city’s proposal.

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Additional needs were miscalculated in the Housing Element, resulting in overstated land needs

Future land needs for the city include space for churches, schools, parks and streets. In Medford schools, parks, churches and some limited other uses are generally built on land zoned for residential purposes. Thus it is reasonable to add land to the residential land needs to meet those needs.

OAR 660-024-0040(10) allows cities to assume that these needs (including streets, but excluding churches) will require an amount of land equal to an additional 25 percent of the land needed for future residential needs. As a safe harbor cities can add that land to their land needs without explanation. Cities can assume a different amount, but that amount must then be justified.

Table 39 of Medford's Housing Element shows a need for 455 net acres for housing and an additional 98 acres (or 21 percent) for streets and roads.¹⁴

The Housing Element then goes on to assert an additional need of 426 acres for parks, schools, churches, and other uses including fraternal organizations and government. Thus, including the 98 acres for streets and roads already included in the housing needs, the Housing Element asserts an additional need of more than 100 percent of the amount of land needed for residential purposes to meet "other land needs" in the residential zone.

The Housing Element does not address why this excess over the safe-harbor assumption is reasonable. It appears to be calculated and justified based solely on replicating the current ratio of all of these uses against the population. (17.0 acres per 1,000 people.)¹⁵

There are a number of problems with these calculations, including the following:

The need for parkland mistakenly includes land to offset the development of an existing golf course

Golf courses in Medford are generally on land zoned for residential use. As such, the land is counted in Medford's inventory of residential land, and is available for conversion to residential purposes at any time.¹⁶ The recent history with Cedar Links illustrates this possibility.

The asserted need for parkland must be consistent with another city plan: The Parks (or in the case of Medford the "Leisure Services") Plan. This consistency includes both the amount of land and the types of facilities that the city has identified. Golf courses are not included in the Leisure Services plan as an identified need that is presumed for the city.

¹⁴ Stated as 455 "net" acres and 533 "gross" acres. In this case gross acres includes the land needed for housing and the streets to connect it all.

¹⁵ Medford Comprehensive Plan, Housing Element, p. 63.

¹⁶ It is our understanding that the one exception to this is the Country Club, which has an open-space assessment and is thus considered "unbuildable" land.

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The development of residential land that happens to be currently used as a golf course (as opposed to being farmed, or sitting vacant) cannot be offset by a claimed need for more of the same (or, in this case, additional privately owned and operated recreation space included counted in the parks and open-space land needs). It is residential land that is being developed for that purpose.

The Housing Element wrongly asserts a need to add land to the residential land needs to offset this development.¹⁷ The part of the 426 acres of asserted need for "Other Residential Land Needs" that is attributable to the development of Cedar Links should be removed from the proposal.¹⁸

Some of the employment needs have been double-counted, resulting in overstated land needs

The Housing Element also asserts that 135 of the 426 acres are for city, county, state, federal, and "other public agency" lands. These facilities are generally not sited on land zoned for residential uses. (Think City Hall, County and state offices, courts, post offices, etc.)

These are also places of employment, and the land needs for them would presumably be captured in the needs identified in the Economic Element along with land needs for other employment categories.

In fact, in this case they are captured in the Economic Element as growth in the "Public Administration" sector.¹⁹ Additional land needs are reflected in the land need calculations for new office space.

Thus, land needs for these workers are double counted in the proposed plan: once in the Economic Element, and once in the Housing Element.

There are many reasons why the calculations in the Housing Element should be discarded in favor of those in the Economic Element, not least of which are the facts that

- It is extremely unlikely that there will be a need for an additional city hall, courthouse, federal building, etc., so calculating needs for government facilities based on current uses over-states the future need;
- The land need should be based on projected increase in employees working in this sector, which are calculated in the economic element; and

¹⁷ See p. 63.

¹⁸ The Housing Element appears to offset this loss somewhat with the presumed development of another private park (Howard Sports Park). To the extent that this private park is not included in the assumptions in the Leisure Services Plan its effect on land need calculations should also be eliminated from the proposal.

¹⁹ Medford Comprehensive Plan, Economic Element, Figure 14 and following.

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- These uses will be placed on land zoned for employment, and should be calculated and included with the rest of the employment land needs.

The current proposal should be reduced by 135 acres to eliminate double-counting of these employment land needs.

Stated land needs in this category may still be excessive

Removing the effect of privately owned recreation facilities and government facilities leaves about 247 acres in the "Other Residential Land Needs" category. That, combined with the 98 acres already included for streets, still exceeds the safe harbor of 25 percent by a significant amount. It is not possible with the information available now to determine whether this can be justified or not. It should be noted that 44 of those acres are for "fraternal organizations." It is not clear to what extent those facilities are located on residential land, may or may not be captured in employment calculations, or will need the same amount of land per 1000 people in the future as they have in the past. Further work is needed to address this issue.

Additional land may have been included in the "unbuildable" category improperly

It is our understanding that the 402 acres of "built or unbuildable" land mentioned above may include approximately 120 acres of land that currently consists of the fairways at Centennial Golf Club. If that is the case then one of two options can be exercised:

- The acres that Centennial does not plan to develop may be eligible to come into the UGB as "unbuildable land" provided they have the "open space assessment" placed on them (as we understand the Country Club land does).
- If the land does not come into the UGB with the "open space assessment," it comes in as buildable land and is counted against the land that is being included to meet future housing needs (as is the case with other golf courses in the region with the exception of the Country Club). If that is the case, an equivalent number of acres will have to be removed from the proposal's asserted residential land needs, as they will become excessive.

At this time we do not have a preference as to which approach is followed.

Conclusions and Recommendations

As noted above, based on information that is currently available for public review, we find that the shape of the staff proposal is based on a generally sound technical analysis that has resulted in a fundamentally sound proposal from which to begin the public hearings process.

What problems we have identified to date are related to the amount of land in the proposal. With the one exception of the assumption that all parkland must be buildable land, the cause of

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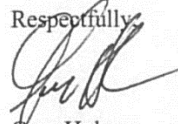
this issue appears to be errors in or conflicts between the foundation documents (elements of the Comprehensive Plan) that must be relied on in a UGB evaluation.

At this point we recommend that the Planning Commission fix those errors and remove their effects on the proposal before sending a recommendation to the City Council.

We also recommend that if the Planning Commission is going to consider adding any areas that are not in the current proposal you carefully consider the net impacts that those additions (along with the required subtractions to keep the proposal from exceeding what can be justified) will have on the future of the city.

Please place these comments in the record and notify me at the Grants Pass address above of any decisions or future hearings or meetings on this subject.

Respectfully,



Greg Holmes
Southern Oregon Planning Advocate
1000 Friends of Oregon

CC: Josh LeBombard, DLCD

MORE EXTENSIVE IS MORE EXPENSIVE

How Sprawl Infrastructure Bankrupts Oregon Communities, and What We Can Do About It



Oregon's physical infrastructure is an investment in the future of its residents and communities.

Unfortunately, many Oregon communities are making the wrong bets. They're falling behind on maintenance, taking on debt, and raising taxes to pay for it all.

Why is this happening? A big part of the answer is the shape of communities. Some development patterns create much higher public costs than others. Land-extensive sprawl costs a lot more for infrastructure than more efficient development, especially when total lifecycle costs are included.

But there is an alternative. Quality growth directs development into existing communities and creates walkable neighborhoods with mixed land uses and transportation options. At the same time, it saves communities millions. In these difficult fiscal times, quality growth is the best fiscal bet for Oregon's future.

Unfortunately, current Oregon law does not require cities to consider the full lifecycle costs of infrastructure when making growth decisions. It's time to change this. **By considering the full costs of infrastructure, we can hold leaders accountable and help communities step back from sprawl's fiscal edge.**

It's time to make a choice to transform how we make choices.
Read more within.

About this document

This document is a summary of key findings from our 2013 report, "More Extensive Is More Expensive," an analysis of sprawl-induced infrastructure costs and recommendations for what Oregon can do to address this growing problem.

Download the full version of this report at
www.friends.org/infrastructure



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Photo: ODOT. Creative Commons.



Photo: Brett D. Creative Commons.

By the numbers:

Sprawl, Infrastructure, and Oregon's Burden

\$10,000,000,000

Total of unfunded infrastructure maintenance through 2035 in the Portland Metro area, even without new growth. A total of \$27-41 billion will need to be spent before 2035 for projected future population and employment growth.

\$6000+

for every resident of the three-county region

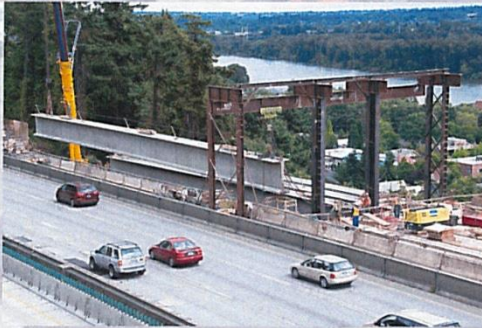


Photo: ©2007 Creative Commons

24%

Proportion of Oregon bridges that are deficient, along with 1,000+ schools and \$5.2 billion of repairs needed for Oregon water infrastructure—over \$1,300 per Oregon resident.

69%

Proportion of Oregon cities that expect property taxes to fall short of the cost of providing essential services. Cities need **\$187,000,000** in new revenue to meet current maintenance/construction needs.

19

Minimum number of local ballot measures that have asked Oregon voters to raise taxes on themselves to fund infrastructure maintenance or construction from 2010 through summer 2012. Of these, 11 passed.

*“Structurally, [Oregon] cities are unable to meet current and future demands for the services that are necessary to support service levels, road and public facility maintenance and population growth. **Cities are being slowly strangled.**”*

—League of Oregon Cities executive director Mike MacCauley, in a press release announcing an ECONorthwest study into Oregon infrastructure budgets

1000 FRIENDS OF OREGON



Photo: Ed Branson, Creative Commons

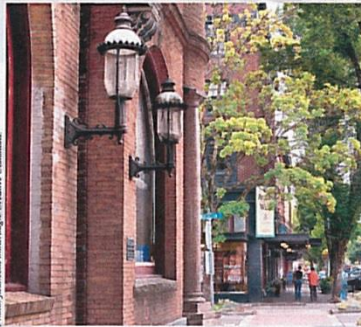
Background Photo: Rudy Salazar, Creative Commons

By the numbers:

The Quality Growth Difference

\$10,100,000,000

Total estimated savings for reducing sprawl and making more efficient use of urban land to accommodate 20-40 years of growth in the Austin region, according to a landmark "Envision Central Texas" report.



10:1

The ratio of per-acre property tax revenues for a retail store in a walkable area vs. a big box shopping center.



3,42

The number of years, respectively, for a 3.4 acre multifamily development in downtown Sarasota, Fla., and a traditional 30-acre subdivision, to produce enough tax revenue to cover the public's infrastructure investments.

"Prudent land use policies that direct development into existing communities not only protect what is most special about the place... they also save taxpayer money, an especially crucial benefit given today's stretched budgets."

—The Sonoran Institute on the results of its scenario study for Gallatin County, Montana

72%

Road construction and maintenance savings in rural Gallatin County, Mont., through better land conservation versus rural sprawl. Gallatin County (below) has about the same population as Jackson County, Ore.



MORE EXTENSIVE IS MORE EXPENSIVE
Download the full report at friends.org/infrastructure

Background Photo: Flickr.com/mer_1_in_1c, Creative Commons.

Back from the edge:

Oregon's Strategy for Fiscal Accountability

Oregonians have a choice. We can step back from the ledge of ravenous, sprawl-induced infrastructure spending. We can develop a strategy for filling our current holes (literal and financial) without digging any deeper.

How? **We propose that Oregon communities employ a tool known as Fiscal Impact Analysis to assess the full lifetime infrastructure costs incurred by different styles of development.**

When we look at the long-term costs of roads, sewers, water lines, and so on, the evidence is clear. More extensive infrastructure is more expensive infrastructure. Quality growth—focusing on existing communities, more efficiently using existing infrastructure, employing transportation options—is the cost-conservative choice.

We can begin today. Each time an Oregon city considers whether to expand its urban growth boundary to accommodate new population and employment growth, it should incorporate Fiscal Impact Analysis to understand the true obligations its growth decisions will create for future residents.

Citizens deserve to know the full costs of growth choices. And they expect their leaders to justify the costs of growth against other priorities like maintaining existing roads and sewers, rebuilding existing bridges, and modernizing existing schools.

The choice is clear. **If we can't afford the path we're on, it's time to come out of the woods.**

What you can do

- **Learn more.** Read the full version of this report at www.friends.org/infrastructure.
- **Share.** Pass this summary and/or the full report to others with an interest in the fiscal health of our communities—which, in reality, is all of us.
- **Advocate.** Send this report to your elected leaders, local officials, and other decision makers who make decisions that will impact your pocketbook. Ask them to consider the full costs of their growth decisions. Invite them to pursue a better choice.
- **Report.** Tell us about the infrastructure challenges facing your community. What are your concerns? What do you want to see changed? What has the sprawl burden done to your community? Send comments to craig@friends.org or write to us at the address below.



Download the full version of this report at www.friends.org/infrastructure.

1000 Friends of Oregon
133 SW 2nd Ave. #201 | Portland, OR 97204
(503) 497-1000 | www.friends.org
Support 1000 Friends: friends.org/support

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Oregon

Theodore R. Kulongoski, Governor

Department of Land Conservation and Development

635 Capitol Street NE, Suite 150
Salem, Oregon 97301-2540
Phone: (503) 373-0050
Fax: (503) 378-5518
www.oregon.gov/LCD



January 5, 2011

Jim Huber, Community Development Director
City of Medford
Lausmann Annex
200 South Ivy Street
Medford, OR 97501

RE: Incomplete Submittal of Plan Amendment (Medford file no. CP-08-055; DLCD file no. Medford PAPA 008-09)

Dear Mr. Huber:

On December 13, 2010, this department received a notice of adoption from Medford regarding an update of the Housing Element of the city's comprehensive plan. It appears the city has expended considerable effort and adopted a product that will help the city make prudent planning decisions. There are some procedural issues with the submittal that we wish to bring to your attention, however.

ORS 197.626 and OAR 660-025-0175 provide that urban growth boundary (UGB) amendments of over 50 acres for cities with a population of over 2,500 are reviewed by the Land Conservation and Development Commission (LCDC) in the manner of a periodic review task submittal. We are aware that the plan amendment adopted by the city does not itself amend the city's UGB. However, as explained below, we believe under current LCDC rules the city's action to update its Housing Element will be subject to review by LCDC when the city amends the UGB.

As you are aware, ORS 197.296, "factors to establish sufficiency of buildable lands within urban growth boundary; analysis and determination of residential housing patterns," applies to Medford's submittal. The city's submittal is subject to ORS 197.296 and statewide Goal 10, Housing, and Goal 14, Urbanization, and the administrative rules implementing those goals (see OAR 660-008-0005(4)(c)¹ with regards to the applicability of Goal 14).

These statute, goal and rule provisions interact in a manner that requires a city to address an identified need for additional residential land. That is, when the city identifies a need for

¹ (4) "Housing Needs Projection" refers to a local determination, justified in the plan, of the mix of housing types and densities that will be:

- (a) Commensurate with the financial capabilities of present and future area residents of all income levels during the planning period;
- (b) Consistent with any adopted regional housing standards, state statutes and Land Conservation and Development Commission administrative rules; and
- (c) Consistent with Goal 14 requirements.

Jim Huber, City of Medford

January 5, 2011

additional land to accommodate growth over the next 20 years (996 total gross acres),² a sufficient quantity of land suitable to satisfy the need must be provided, either inside the current UGB or through a boundary amendment, or a combination of the two (ORS 197.296(6)). The determinations of need for housing and for residential land must be made together, as Medford has done, but OAR 660-008-0005(4), together with Goal 14, requires completion of the next step – addressing the need – as well.

Consideration of the city's housing needs, residential land need, and UGB capacity is one process. Since the adopted findings report a need for more than 50 acres to be added to the UGB, OAR 660-025-0175 is applicable and the submittal will be reviewed in the manner of periodic review when it is complete. Furthermore, OAR 660-025-0040(1) states that LCDC has exclusive jurisdiction in periodic review matters.

OAR 660-025-0130(2) states: "After receipt of a work task, the department must determine whether the submittal is complete." As explained above, the city's submittal is treated as a periodic review task, and the department has determined the submittal is incomplete because it does not accommodate the identified need for residential land. Furthermore, since this action is part of a UGB amendment, county concurrence with the amendment is required by Goal 14 (OAR 660-015-0000(14))³ and OAR 660-024-0020(2)⁴ which includes adoption of all supporting documents, i.e. Medford's Housing Element; since Jackson County has not co-adopted this amendment, the submittal is incomplete.

Finally, the notice of adoption of a decision to be reviewed in the manner of periodic review must be provided as specified in OAR 660-025-0140. Since the city has not provided this notice, the department must return the submittal on these grounds, as well.

If you have any questions please feel free to contact me at (503) 373-0050 ext. 280, or Ed Moore, your regional representative, at (971) 239-9453 or ed.w.moore@state.or.us.

Yours truly,



Richard Whitman
Director

cc: Kelly Madding, Jackson County Development Services Director (email)
DLCD Staff (email)

² City of Medford Comprehensive Plan Housing Element, Draft of September 10, 2010, page vii.

³ An urban growth boundary and amendments to the boundary shall be adopted by all cities within the boundary and by the county or counties within which the boundary is located.

⁴ The UGB and amendments to the UGB must be shown on the city and county plan and zone maps at a scale sufficient to determine which particular lots or parcels are included in the UGB. Where a UGB does not follow lot or parcel lines, the map must provide sufficient information to determine the precise UGB location.

APPENDIX D.

UGBA PHASE 1 EFFECT ON LAND SUPPLY

Urban Growth Boundary Amendment (UGBA) Phase 1 (ISA GLUP Amendment) sought to change the General Land Use Plan (GLUP) designation of land in the existing urban area for the purpose of increasing its development capacity in order to accommodate some of the City's projected need for residential and employment land. The outcome of UGBA Phase 1 was the Selected Amendment Locations (SALs). This changed the land supply and need totals.

The Housing Element categorizes available residential land into three categories: Vacant, Partially Vacant, and Redevelopable. A capacity analysis was completed for the properties included in UGBA Phase 1 and the number of developable acres was determined for each of those properties. For residential land types these acres were also classified as Redevelopable, Partially Redevelopable, or Vacant based on the analysis from the Housing Element. Table 4.1 provides a tabulation of the gains and losses in each of the three categories, for each of the three residential GLUP types, from UGBA Phase 1. The available land supply from the Housing Element was changed based on these numbers in order to account for UGBA Phase 1's effect on the residential land supply.

Table 4.2 shows the effect of UGBA Phase 1 on all GLUP designations. The supply of employment GLUP types from the Economic Element were changed based on these numbers.

Table 4.1. UGBA Phase 1 Effect on Residential Land Supply by Availability Type in Acres (adapted from Ordinance no. 2014-154, Exhibit A, SAL Capacity Analysis)

Rdv = Redevelopable, Vac = Vacant, and PDR = Partially Redevelopable

Total	UR Rdv Gain		UR Vac Gain		UR PDR Gain	
	215a-ur	0.1				
		0.1				

Total	UH Rdv Gain		UH Vac Gain		UH PDR Gain	
	215c-uh	3.8	510b-uh	6.2	630a-uh	0.1
	510b-uh	0.2	510b-uh	0.4	630a-uh	2.0
	510b-uh	0.2	640b-uh	0.6	630a-uh	0.8
	540b-uh	19.4	640b-uh	1.8	630a-uh	1.4
	540b-uh	0.3	640b-uh	0.3	640b-uh	4.8
	630a-uh	1.2	670b-uh	2.9	640b-uh	0.7
	640b-uh	0.3			640b-uh	1.7
	640b-uh	0.3			640b-uh	0.9
	640b-uh	0.4			670b-uh	1.2
	640b-uh	0.5			670b-uh	1.1
	640b-uh	4.2				
	670b-uh	0.2				
	718a-uh	5.3				
		36.3		12.2		14.7

Total	UM Rdv Gain		UM Vac Gain		UM PDR Gain	
	540b-um	10.1	213a-um	2.6	212a-um	1.0
	540b-um	10.8	213b-um	4.1	212a-um	1.5
	540b-um	0.2	630b-um	1.1	212b-um	4.5
	630b-um	1.4	630b-um	0.6	540d-um	1.5
	630b-um	0.6			630b-um	1.1
	630b-um	0.3			630b-um	1.6
	630b-um	1.0			630b-um	0.3
	630b-um	1.0			630b-um	0.9
	630b-um	1.3			630b-um	0.8
	630b-um	0.3			630b-um	1.2
	630b-um	0.4			630b-um	1.0
	630b-um	0.3			630b-um	1.0
	670a-um	1.1			640a-um	2.2
	930a-um	4.8			640a-um	4.8
	930c-um	6.6				
		40.2		8.4		23.4

Total	UH Rdv Loss		UH Vac Loss		UH PDR Loss	
	740a-cm	0.4	320a-cm	3.8		
			960a-sc	0.7		
			960a-sc	1.6		
		0.4		6.1		

Total	UR Rdv Loss		UR Vac Loss		UR PDR Loss	
	510b-uh	0.2	213a-um	2.6	212a-um	1.0
	510b-uh	0.2	213b-um	4.1	212a-um	1.5
	540b-um	10.1	510b-uh	6.2	212b-um	4.5
	540b-um	10.8	510b-uh	0.4	540d-um	1.5
	540b-um	0.2	630b-um	1.1	630a-uh	0.1
	540b-uh	19.4	630b-um	0.6	630a-uh	2.0
	540b-uh	0.3	640b-uh	0.6	630a-uh	0.8
	630b-um	0.3	640b-uh	1.8	630a-uh	1.4
	630a-uh	1.2	640b-uh	0.3	630b-um	1.1
	630b-um	1.4	670b-uh	2.9	630b-um	1.6
	630b-um	0.6	510a-cm	11.1	630b-um	0.9
	630b-um	0.3	718b-cm	1.8	630b-um	0.8
	630b-um	1.0	718b-cm	0.5	630b-um	1.2
	630b-um	1.0			630b-um	1.0
	630b-um	1.3			630b-um	1.0
	630b-um	0.3			640a-um	2.2
	630b-um	0.4			640a-um	4.8
	630b-um	0.3			640b-uh	4.8
	640b-uh	0.3			640b-uh	0.7
	640b-uh	0.3			640b-uh	1.7
	640b-uh	0.4			640b-uh	0.9
	640b-uh	0.5			670b-uh	1.2
	640b-uh	4.2			670b-uh	1.1
	670a-um	1.1			217a-cm	2.7
	670b-uh	0.2			217b-cm	1.5
	718a-uh	5.3			640c-cm	1.7
	930a-um	4.8			640c-cm	1.1
	930c-um	6.6			718b-cm	2.3
	680a-cm	1.2				
	680a-cm	0.3				
	930b-cm	9.1				
	930d-cm	4.3				
	930d-cm	1.3				
		89.2		34.0		47.1

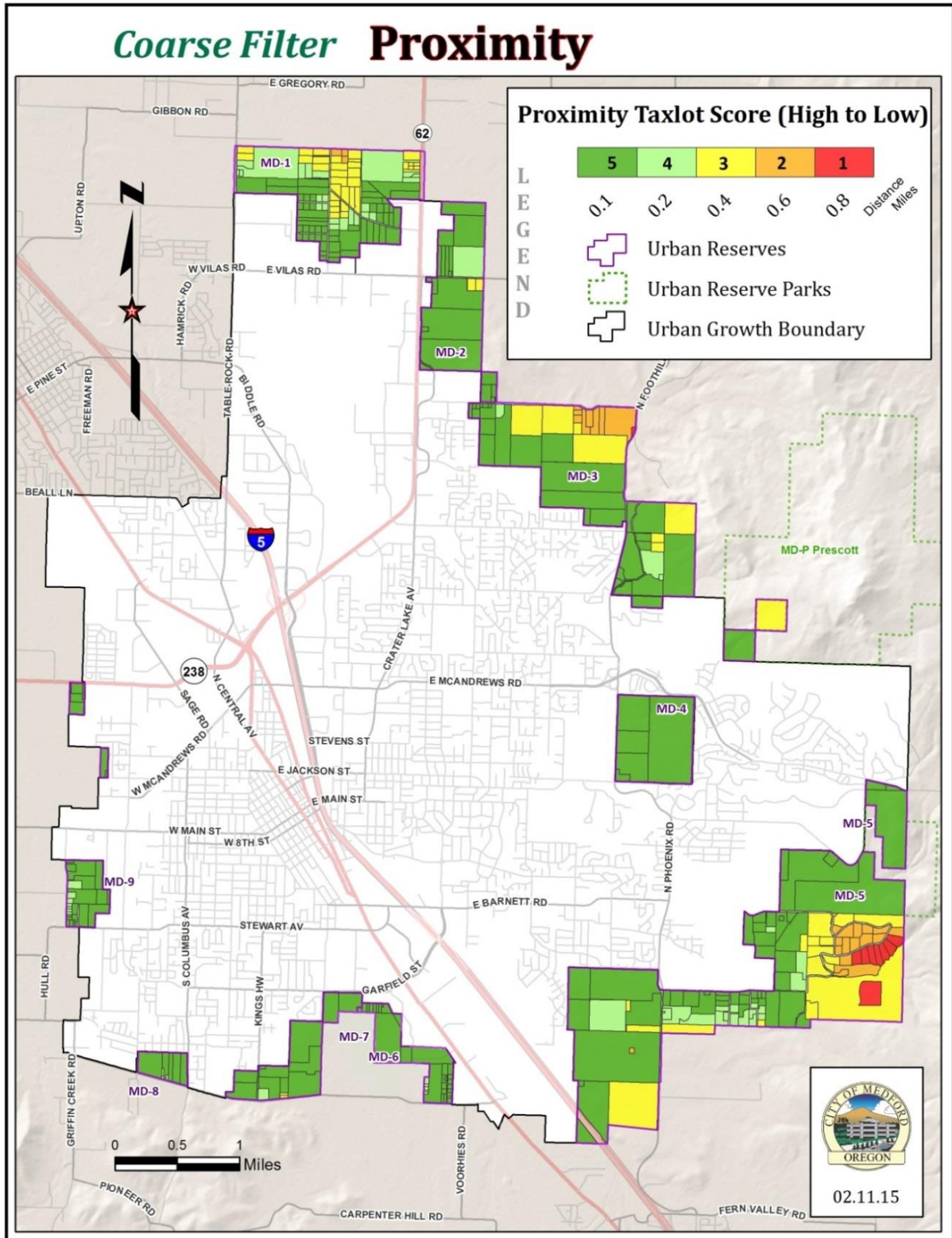
Appendix D: UGBA Phase 1 Effect on Land Supply

Table 4.2. UGBA Phase 1 Effect on Land Need by GLUP Designation in Acres (adapted from Ordinance no. 2014-154, Exhibit A, SAL Capacity Analysis)

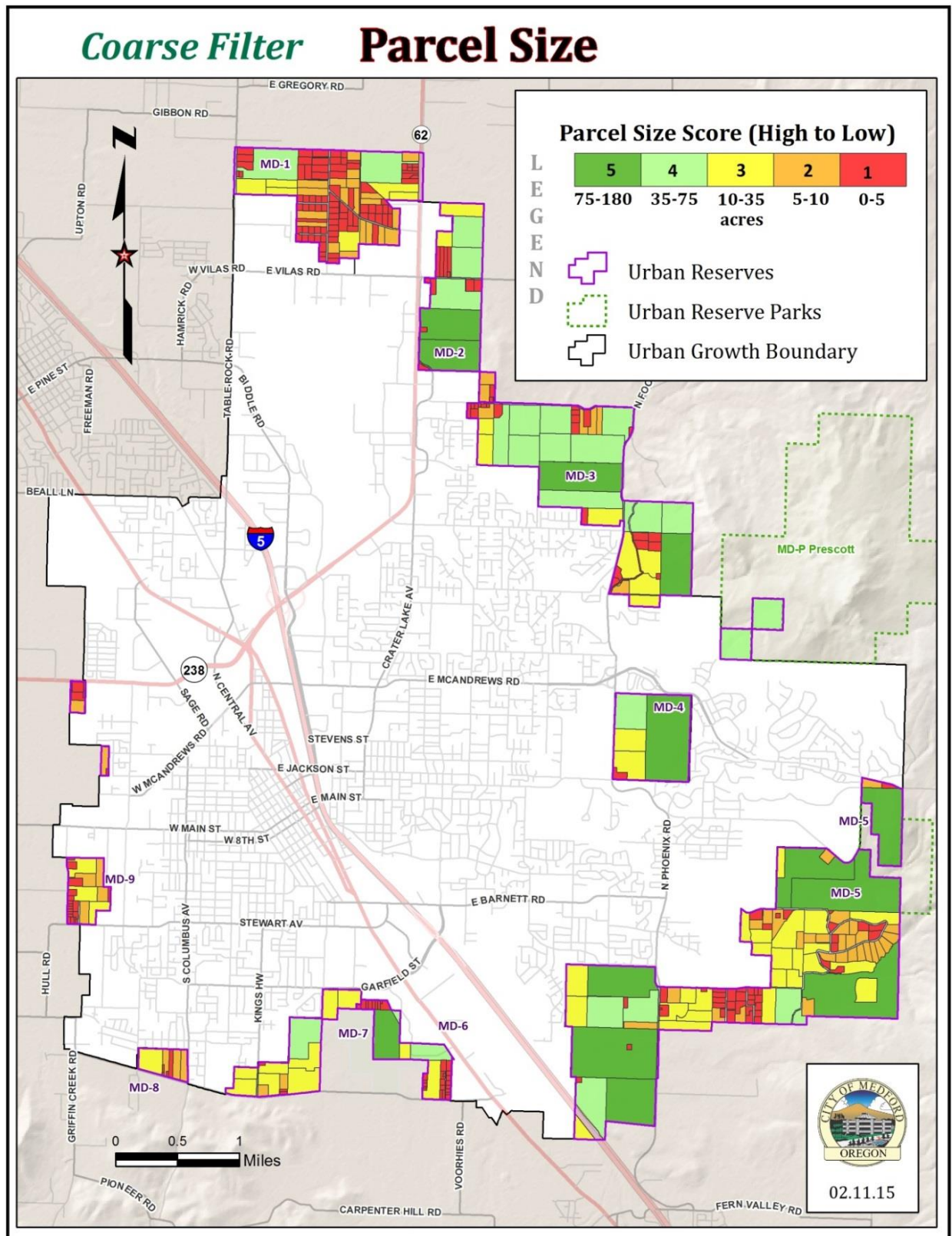
GLUP	Addition (acres) to Supply by GLUP per Individual SAL						Subtraction (acres) to Supply by GLUP per Individual SAL					
	CM	UM	UH	UR	SC		UR	GI	HI	UH		
	140a-cm 77.6	212a-um 5.2	215c-uh 3.8	215a-ur 0.1	960a-sc 2.4		212a-um 5.2	214a-cm 6.3	140a-cm 77.6	320a-cm 3.8		
	214a-cm 6.3	212b-um 4.5	250a-uh 3.1				212b-um 4.5	215a-ur 0.1	750a-cm 0	740a-cm 0.4		
	215b-cm 22.3	213a-um 6.7	510b-uh 7.1				213a-um 6.7	215b-cm 22.3	760a-cm 0	960a-sc 2.4		
	216a-cm 4.2	540b-um 21.1	540c-uh 19.7				217a-cm 4.2	215c-uh 3.8				
	217a-cm 12	540d-um 1.5	630a-uh 5.6				250a-uh 3.1	216a-cm 4.2				
	320a-cm 3.8	630b-um 16.5	640b-uh 18.3				510a-cm 27.1	217a-cm 7.8				
	510a-cm 27.1	640a-um 7.7	670b-uh 6.0				510b-uh 7.1					
	540a-cm 0.2	670a-um 1.1	718a-uh 5.3				540a-cm 0.2					
	640c-cm 3.0	730a-um 0					540b-um 21.1					
	680a-cm 1.5	930a-um 4.8					540c-uh 19.7					
	718b-cm 4.6	930c-um 6.6					540d-um 1.5					
	740a-cm 0.4						630a-uh 5.6					
	750a-cm 0						630b-um 16.5					
	760a-cm 0						640a-um 7.7					
	930b-cm 9.1						640b-uh 18.3					
	930d-cm 4.3						630c-cm 3.0					
	940a-cm 1.3						670a-um 1.1					
	970a-cm 0						670b-uh 6.0					
							680a-cm 1.5					
							718a-uh 5.3					
							718b-cm 4.6					
							730a-um 0					
							930b-cm 9.1					
							930c-um 6.6					
							930d-cm 4.3					
							940a-cm 1.3					
							970a-cm 0					
							930a-um 4.8					
Total Gain (Loss)	177.7	75.7	68.9	0.1	2.4		(196.1)	(44.5)	(77.6)	(6.6)		
GLUP	CM	UM	UH	SC	GI		HI	UR				
Net Gain (Loss) by GLUP	177.7	75.7	62.3	2.4	(44.5)		(77.6)	(196)				

APPENDIX E. COARSE FILTER MAPS

Map 5.1. Proximity

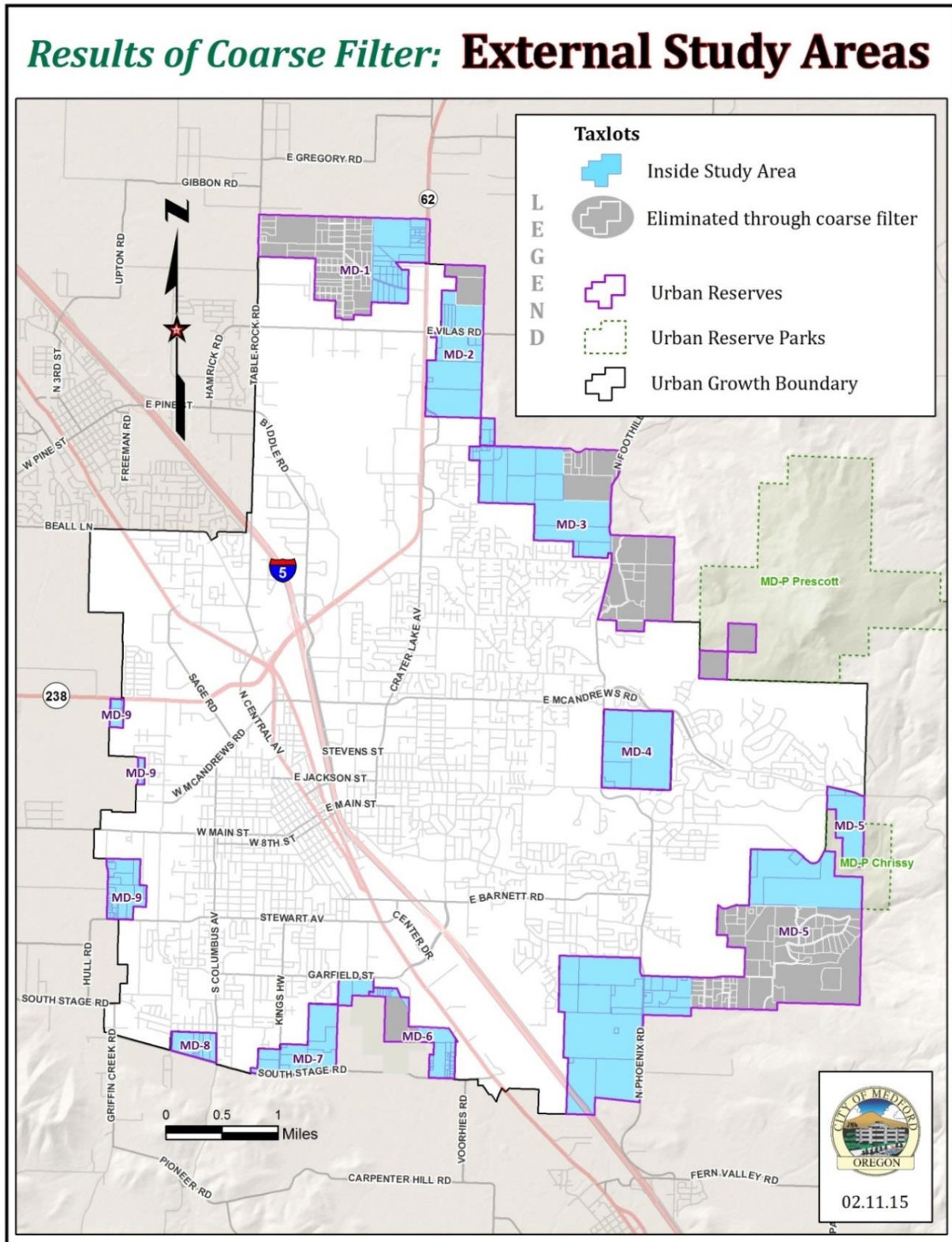


Map 5.2. Parcel Size

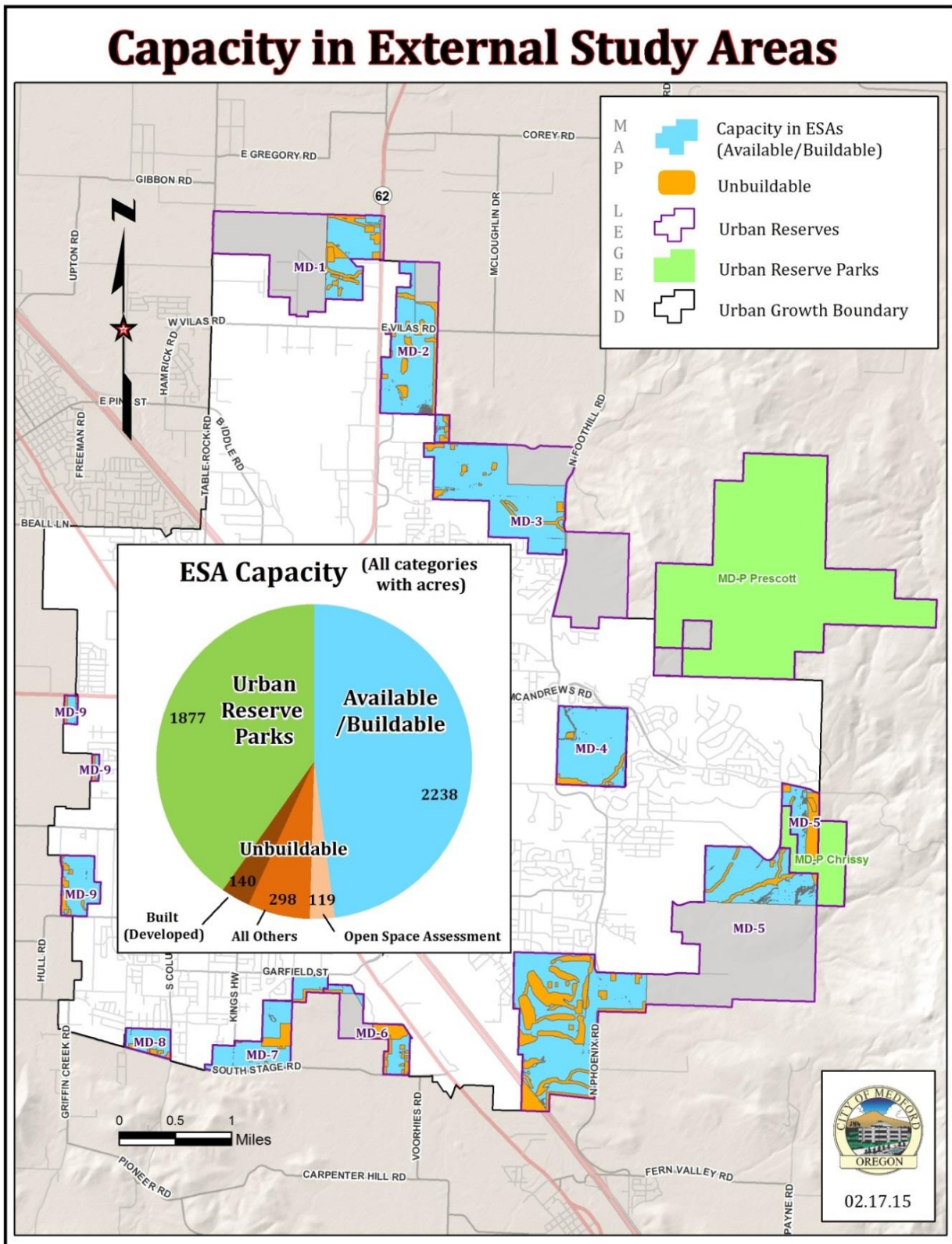


APPENDIX F. EXTERNAL STUDY AREA (ESA) AND CAPACITY IN ESA MAPS

Map 6.1. External Study Areas (ESAs)

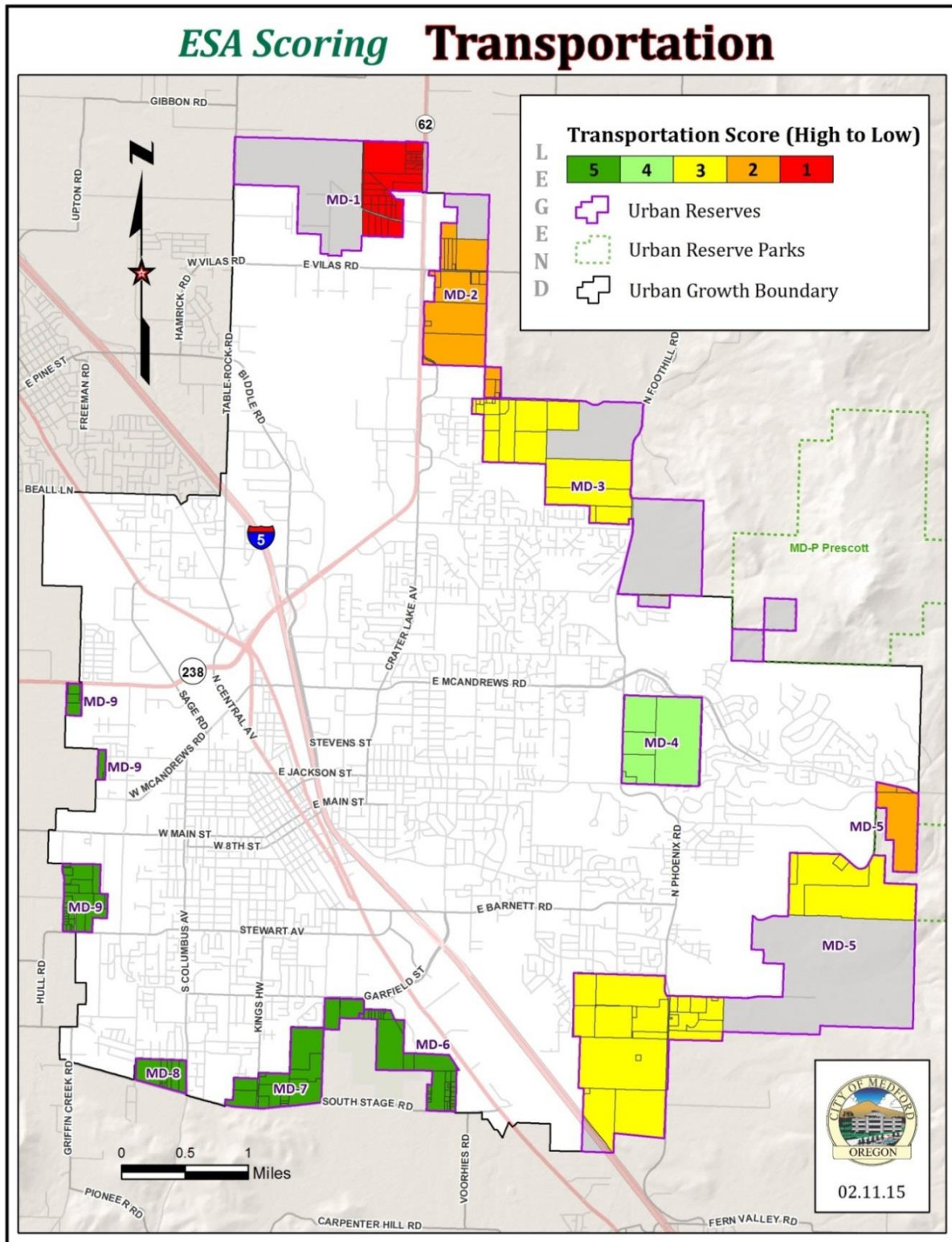


Map 6.2. Capacity Analysis Results for ESAs

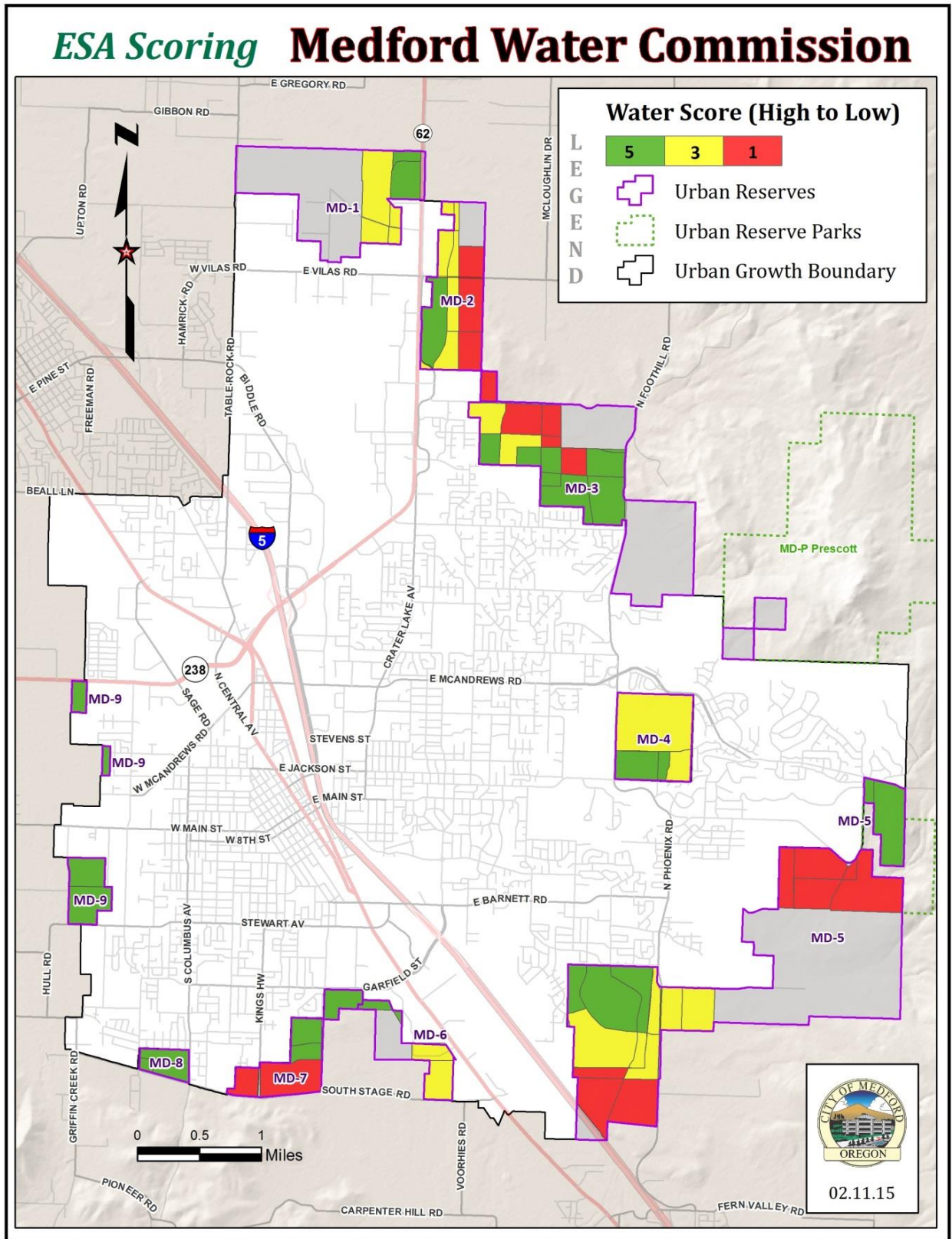


APPENDIX G. ADDITIONAL SCORING MAPS

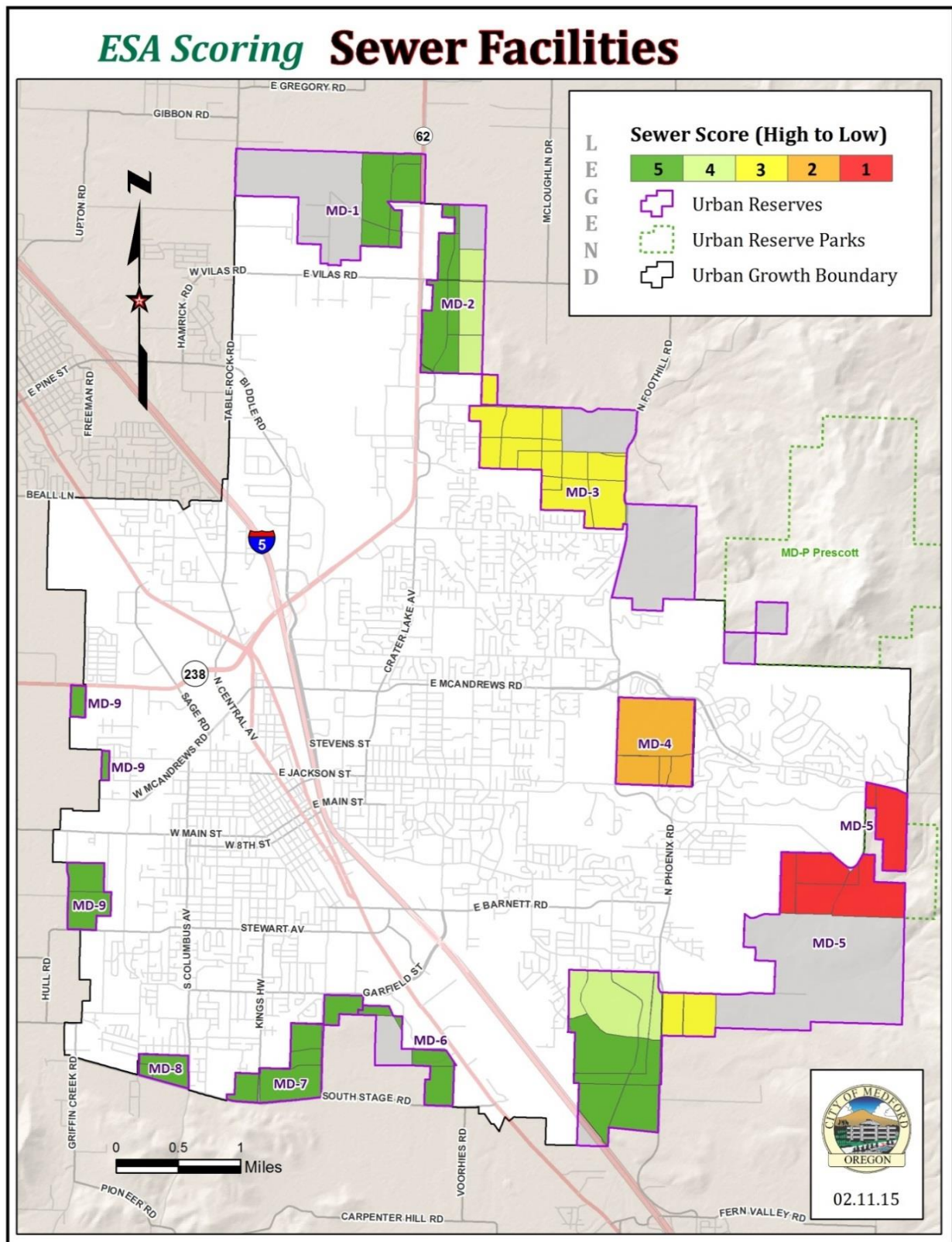
Map 7.1. Transportation



Map 7.2. Water



Map 7.3. Sewer



APPENDIX H. INFRASTRUCTURE SCORING MEMOS

[Cover Sheet]



**City of Medford Transportation System Plan
and Urban Growth Boundary Amendment**



DRAFT Technical Memorandum #8: UGB Expansion Alternatives: Qualitative Comparison of Scenarios

Date: June 26, 2013 **Project #:** 10771
To: Alex Georgevitch, City of Medford
From: Joe Bessman, Julia Kuhn, and Matt Kittelson
Project: City of Medford TSP/UGB Amendment
Subject: Interim Year 2028 Updated Planning Horizon Analysis

This memo compares the City of Medford Urban Growth Boundary (UGB) expansion options (also referred to as External Study Areas, or ESA's) and their impact on the transportation network. Details on the development of these options are summarized in Technical Memorandum #7.

QUALITATIVE EVALUATION CRITERIA

Five qualitative review criteria were used to compare the UGB scenarios, including:

- Generalized infrastructure needed to support each scenario – does the scenario require new arterial/collector streets, or widening of existing roads?
- Generalized effect on congestion on existing roadways within the UGB – does the scenario contribute to already congested corridors in Medford?
- Safety impacts – Are there known safety issues that could be affected by the scenario, or could new safety issues be potentially created?
- Connectivity Issues – Do the existing roadways provide ample connectivity to serve the area, or would other connections be needed?
- Infrastructure costs – relative to the other options, what would it cost to provide the needed transportation facilities?

UGB EXPANSION OPTIONS

City staff developed four UGB expansion scenarios for review (as discussed in Technical Memorandum #7). All four scenarios include the same number of future jobs and households, with variation between scenarios in consideration of buildable lands, zoning, and in the baseline scenario consideration of accommodating all growth external to the existing UGB. Exhibits 1 through 4 illustrate the location of the four scenarios; additional details of each are described below.

FILENAME: H:\PROJFILE\10771 - MEDFORD TGM\MEMOS\MEMO8\TECHMEMO8_ESAALTERNATIVES.DOC

Technical Memorandum 8: UGB Expansion Alternatives: Qualitative Comparison of Scenarios

June 2013

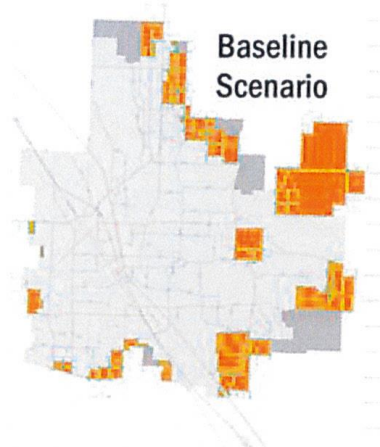


Exhibit 1. Baseline scenario assumes all Medford growth occurs outside of the current UGB with no internal upzoning.

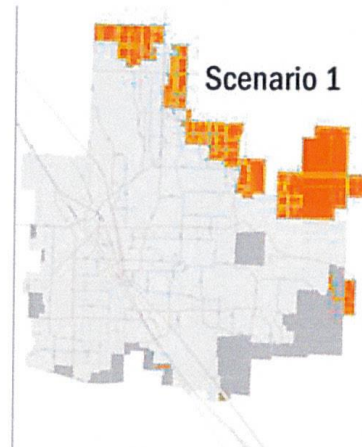


Exhibit 2. Includes internal upzoning and expansion of the UGB to the northeast.

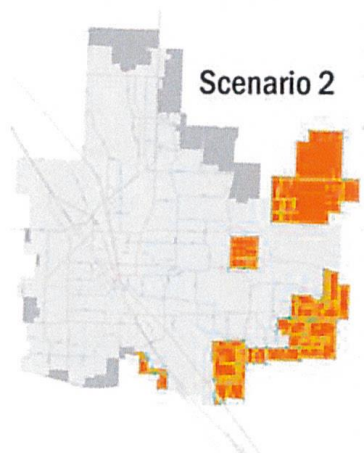


Exhibit 3. Includes internal upzoning and expansion of the UGB to the southeast and in limited portions of the southwest.

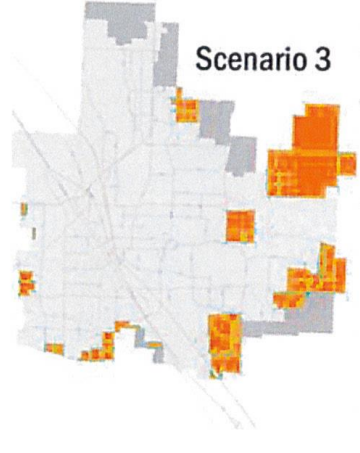


Exhibit 4. Includes internal upzoning and expansion of the UGB to the east and limited portions in the southwest.

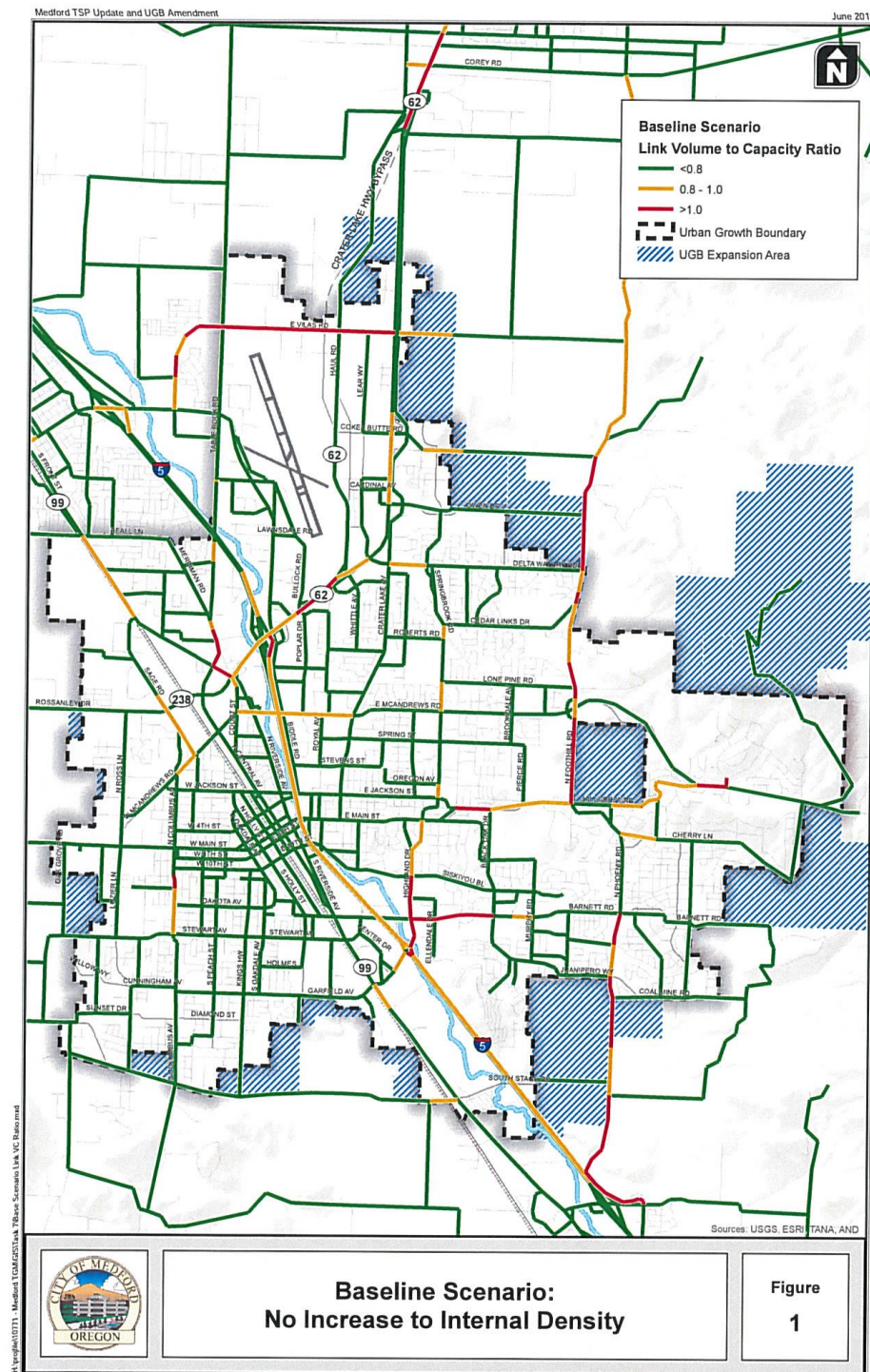
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Baseline Scenario

A summary of the key attributes of the Baseline Scenario is provided below. In general, growth is spread throughout several UGB expansion areas primarily on the northern and eastern sides of the city. In addition, this scenario does not rely on increased densities within the existing UGB. This is the most land intensive scenario being evaluated. For relative comparison purposes, Figure 1 illustrates the projected roadway segment congestion with this scenario.

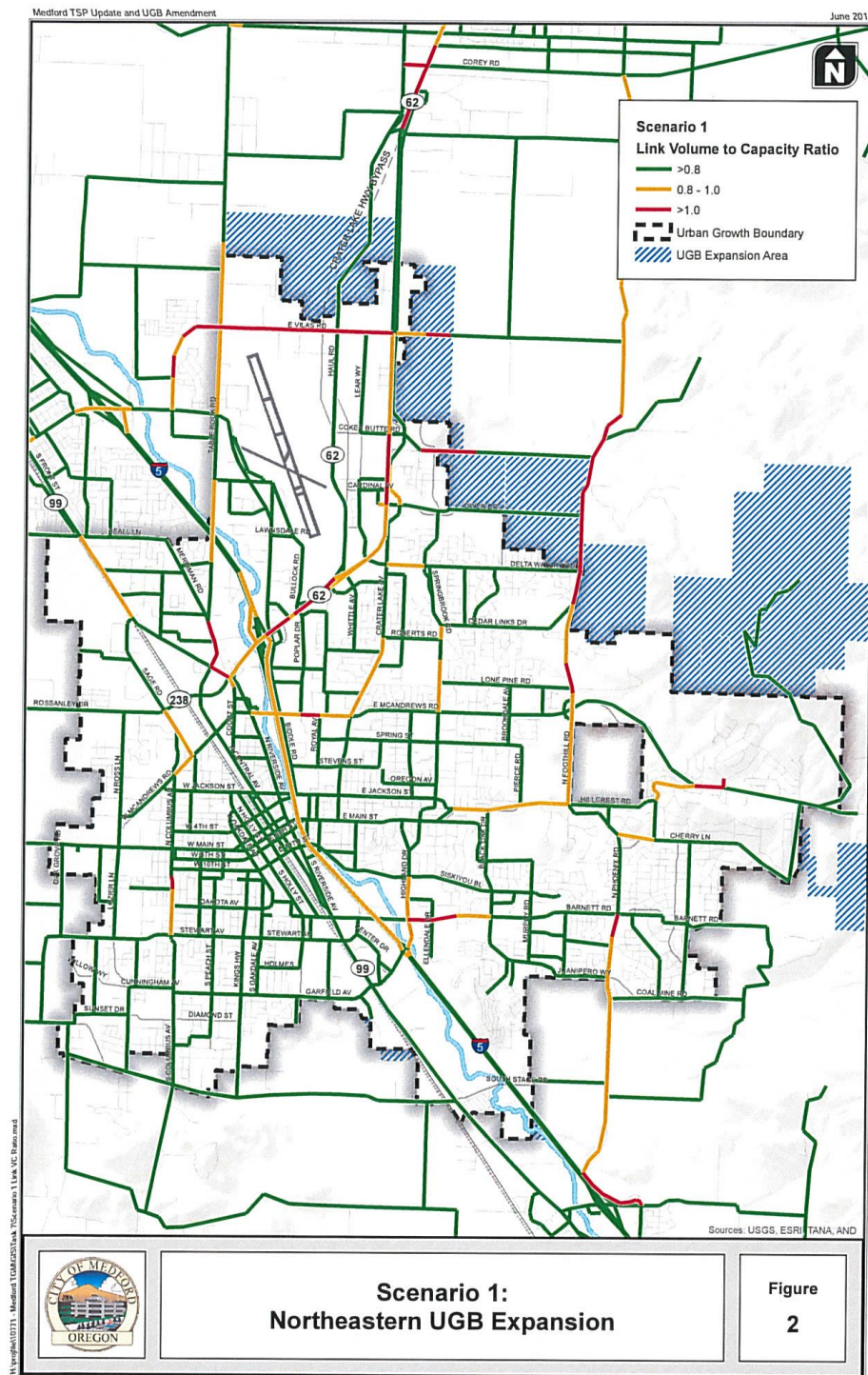
Scenario Description	Supports 2038 growth without upzoning internal UGB lands; requires the most land (4,719 acres) to accommodate projected growth.
Amount of Growth	4,719 total acres of UGB Expansion (most land) <ul style="list-style-type: none"> • 1,908 acres of residential land • 896 acres commercial land • 29 acres industrial land • 1,886 acres open space
Infrastructure Needed to Support Development	With growth outside the UGB occurring in various areas rather than a more concentrated geographic location, a number of new collector and arterial roadways would be needed to connect the various locations into the city's existing street system. In particular, a well-connected collector system that supports access to/from Foothill Road, Vilas Road, Coker Butte Road, and Phoenix Road will be needed. These areas tend to have topographical issues that will need to be considered in the development of an effective street system for multimodal travel needs. Given the levels of congestion on the existing arterials, consideration also needs to be given to providing reasonable access to Highway 62 and I-5 from the expansion areas.
General Effect on Congestion	This scenario relies on access to a number of existing arterials that experience congestion today, such as: <ul style="list-style-type: none"> • OR 62 – Crater Lake Highway • Vilas Road • Phoenix – Foothill Road • Hillcrest Road • I-5 • Barnett Road
General Effect on Safety	Today, sections of Foothill-Phoenix and Hillcrest Road are narrow and windy with limited facilities for pedestrian and bicycle travel near the UGB. Improvements to these facilities would be needed to provide for multimodal travel. In addition, added travel would occur along the Crater Lake Highway and at existing I-5 interchanges, which have documented safety issues today.
General Effect on Connectivity	New connections would largely be needed in various areas to support the arterial system on the east side of the City. Today, very few streets exist in the UGB areas to support additional growth, primarily due to topography issues.
Generalized Costs	Relative Cost: \$\$\$ (Highest of all Scenarios due to geographic scope of needed infrastructure)



Scenario 1: Northeastern UGB Expansion

A summary of the key attributes of Scenario #1 is provided below. In general, growth is concentrated to the east of the Crater Lake Highway and north of Hillcrest Road. In addition, this scenario relies on increased densities within the existing UGB. This is the least land intensive scenario being evaluated, requiring 20 percent fewer acres of expansion than the Baseline Scenario. Figure 2 illustrates the potential roadway segment congestion associated with this scenario.

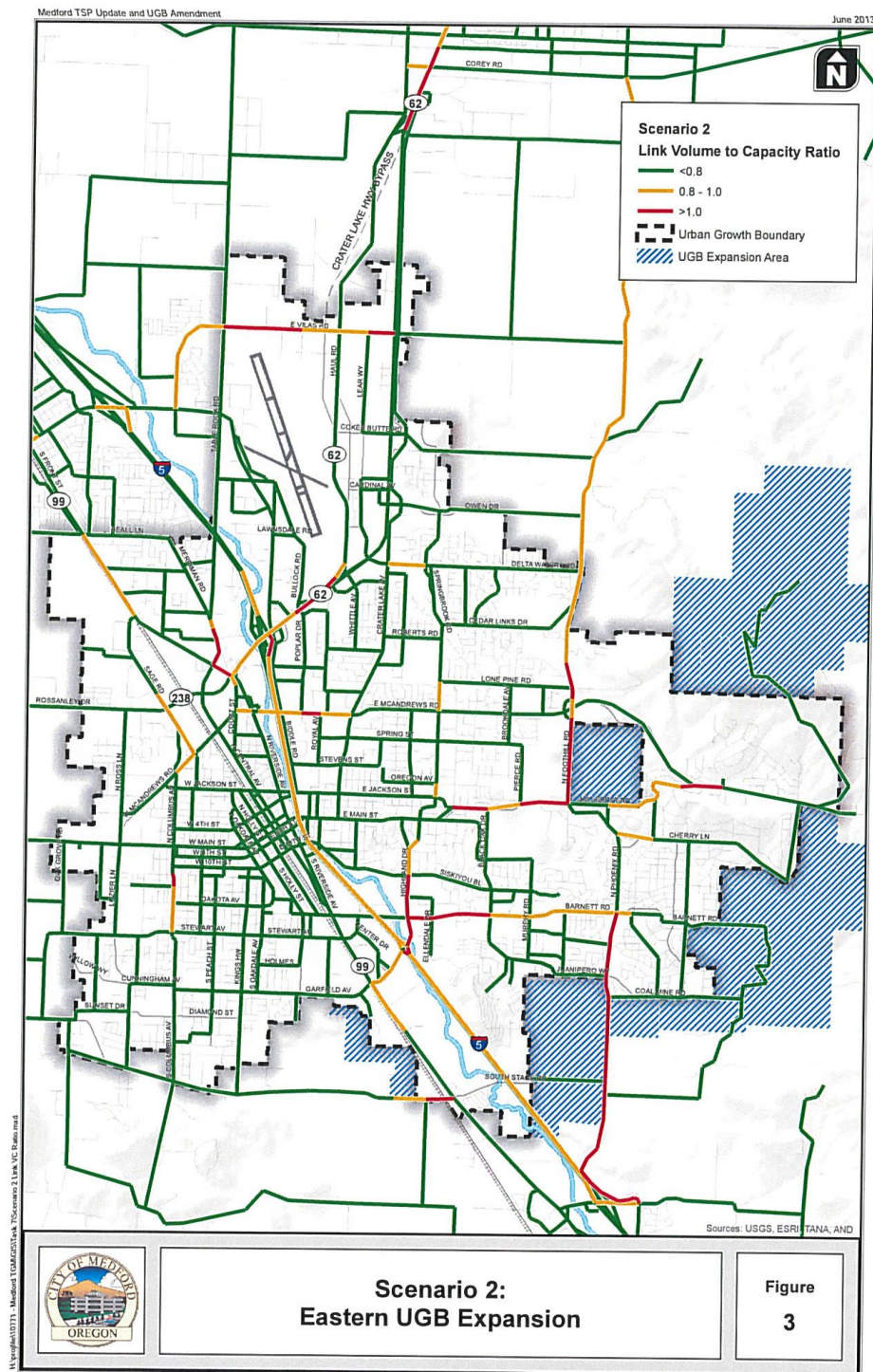
Scenario Description	Expansion of the UGB to the north and northeast; requires the least total land of all scenarios.
Amount of Growth	3,814 total acres of UGB Expansion (Least land-intensive) <ul style="list-style-type: none"> • 1,081 acres of residential land • 423 acres of commercial land • 424 acres industrial land • 1,886 acres open space
Infrastructure Needed to Support Development	High reliance on the Crater Lake Highway and Foothill Road would necessitate improvements to these facilities. A new north-south arterial may also be needed. Further, an extensive local collector street system to support the Foothill Road, Crater Lake Highway, Coker Butte Road and Delta Waters Road corridors will be needed to serve expansion in this area.
General Effect on Congestion	This scenario will place additional pressures on the congested arterial system in the northeast area of the city, such as the Crater Lake Highway, Vilas Road, Foothill Road, Coker Butte Road, as well as the intersection of key roadways with the Crater Lake Highway. The ability to expand these facilities or add new roadways in built areas will be very challenging due to existing land use and topographic constraints.
General Effect on Safety	Today, sections of Foothill Road are narrow and windy with limited facilities for pedestrian and bicycle travel near the UGB. Improvements would be needed to provide for multimodal travel. In addition, additional demand will be placed on Crater lake Highway and the collectors and arterials that intersect it; this highway and its intersections have documented safety issues today.
General Effect on Connectivity	The arterial and collector system in northeast Medford is very limited today. A well connected grid network of streets will be needed to support growth in this area. In addition, new north-south routes would be needed to provide a parallel system of roadways to the Crater Lake Highway. Options to provide this connectivity will be limited by the airport, Bear Creek, and the existing topography.
Generalized Costs of Infrastructure	Providing a well-connected grid system in the northeastern area of the City would be costly due to topographic and land use constraints. Relative Cost: \$\$ (likely higher than Scenarios 2 and 3 but lower than the Baseline)



Scenario 2: Eastern UGB Expansion

A summary of the key attributes of Scenario #2 is provided below. This scenario focuses growth in areas southeast of the UGB as well as northeast of Hillcrest Road/Foothill Road. Like Scenario 1, this scenario relies on increased densities within the existing UGB and requires 15 percent fewer expansion acres than the Baseline Scenario. Figure 3 illustrates the projected levels of congestion associated with this scenario.

Description	Expansion of the UGB largely to the southeast and east.
Amount of Growth	4,035 total acres of UGB expansion (15 percent lower than the Baseline Scenario) <ul style="list-style-type: none">• 1,664 acres residential land• 395 acres commercial land• 89 acres industrial land• 1,886 acres open space
Infrastructure Needed to Support Development	This scenario places higher demands on the Phoenix Road, Foothill Road, Hillcrest Road and Barnett Road corridors than other scenarios considered. The Foothill-Phoenix Road corridor would likely require widening. In addition, a well-connected roadway system that supports South Stage, Foothill, Hillcrest and Barnett is needed.
General Effect on Congestion	Congestion on the State system is generally reduced compared to other scenarios. Higher levels of congestion are expected on the arterials in the southeast part of the city. The ability to make improvements to these arterials is somewhat limited by the existing built environment. However, in general, the increased demands occur on facilities with more capacity for future development than the Baseline and Scenario 1.
General Effect on Safety	The areas within the city with documented safety issues are less impacted by this scenario than some of the other scenarios being considered. Multimodal improvements to the Foothill Road-Phoenix Road corridor will be needed; as discussed previously, sections of this corridor are narrow and windy with limited facilities for pedestrian and bicycle travel near the UGB.
General Effect on Connectivity	A well connected grid network of streets will be needed to support growth in this area that provides connections to the Foothill Road-Phoenix Road, Barnett Road, South Stage, and Hillcrest Road corridors. In addition, a new north-south route to support Foothill Road-Phoenix Road corridor may be helpful.
Generalized Costs of Infrastructure	The transportation infrastructure needed to support growth in a more concentrated area of the city with more capacity than other areas results in lower infrastructure costs in general. Relative Cost: \$ (Lowest, Similar to Scenario 3)



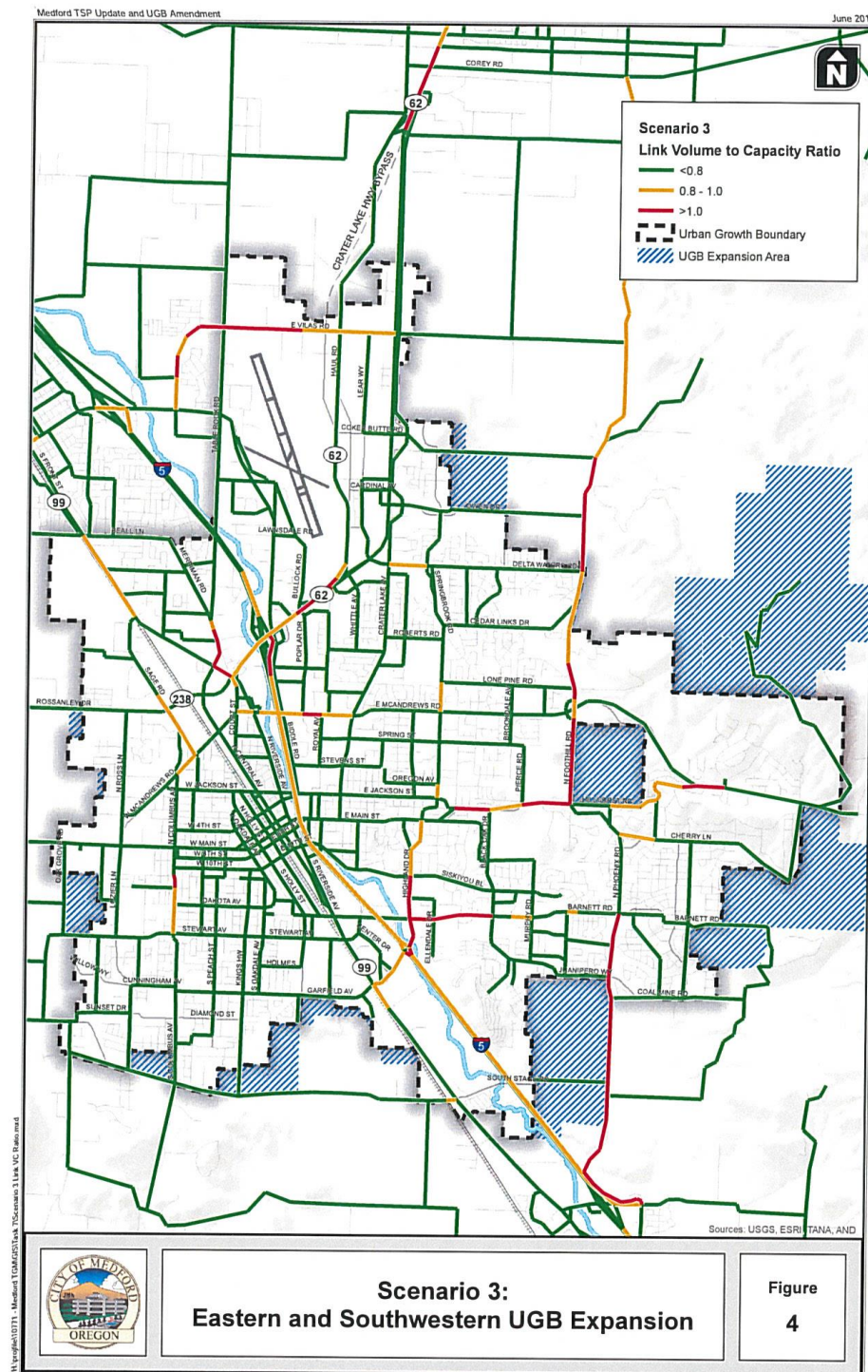
Technical Memorandum 8: UGB Expansion Alternatives: Qualitative Comparison of Scenarios

June 2013

Scenario 3: Eastern and Southwestern UGB Expansion

The key aspects of Scenario #3 are summarized below. This scenario concentrates growth in areas similar to Scenario 2, although with fewer lands expected in the southeast. Like Scenarios 1 and 2, this scenario relies on increased densities in the existing UGB and requires 20 percent fewer lands than the Baseline scenario. Figure 4 illustrates the projected levels of congested associated with this scenario.

Description	Expansion of the UGB to the east and portions of the southwest UGB.
Amount of Growth	3,846 Total Acres of UGB Expansion (20 percent less than Baseline) <ul style="list-style-type: none">• 1,520 acres of residential land• 411 acres of commercial land• 29 acres industrial land• 1,886 acres open space
Infrastructure Needed to Support Development	This scenario places higher demands on Foothill Road, Hillcrest Road, and Phoenix Road (although to a lesser extent than Scenario #2). Like Scenario #2, these existing roadways may need improvement to serve multimodal needs. Further a well-connected grid network that supports these existing facilities would be needed.
General Effect on Congestion	This scenario has similar impacts as Scenario 2 although lower impacts are provided to the Barnett Road corridor.
General Effect on Safety	Like Scenario 2, the areas impacted are not those with extensive documented safety issues. In addition, multimodal improvements will be needed especially near the UGB.
General Effect on Connectivity	Like Scenario #2, a well-connected grid network of streets will be needed to support growth in this area with connections to the Foothill Road-Phoenix Road, and Hillcrest Road corridors. In addition, a new north-south route to support Foothill Road-Phoenix Road corridor may be helpful.
Generalized Costs of Infrastructure	Like Scenario #2, the infrastructure needs associated with this scenario area less significant than other scenarios considered. Relative Cost: \$ (Similar costs to Scenario 2)



Technical Memorandum 8: UGB Expansion Alternatives: Qualitative Comparison of Scenarios

June 2013

SUMMARY OF SCENARIOS

Comparison of the scenarios noted several improvement needs that would be required regardless of the UGB scenario pursued. These are outlined below:

- Need to improve the Phoenix – Foothill connection as high levels of congestion are anticipated. This would likely require a five-lane cross-section from the
- Congestion noted along all northern crossings of I-5: Vilas Road, Crater Lake Highway, and McAndrews Road.
- Moderate to high levels of congestion at and surrounding the I-5 interchanges.
- Columbus Avenue congestion between Stewart and Main Street

Differentiating characteristics between scenarios are summarized below.

- The Baseline Scenario (all growth external to the existing UGB without upzoning internal lands) would be the most costly scenario to support. The additional lands required on the City's periphery place a high reliance on the arterial network both in the southeastern and northern portions of the City.
- Scenarios 2 and 3 provide the lowest costs relative to the other scenarios as improvements are limited to the southeast portion of the City. The improvements in this area would benefit all of the scenarios assessed, and would be implementable given the largely unbuilt areas surrounding these corridors.
- Scenarios 2 and 3 reduce congestion on I-5 and OR 62, where improvements will be very costly or infeasible.
- Southwestern growth in Scenario 3 presents no additional roadway infrastructure needs as the network in this portion of the City is well established and operating with reserve capacity.

Please let us know if you have any questions or comments regarding this qualitative comparison of UGB scenarios.

CITY OF MEDFORD
Interoffice Memorandum

August 20, 2014

TO: Joe Slaughter

FROM: Roger Thom

SUBJECT: UGB – ESA Sanitary Sewer Study

Public Works has reviewed our sanitary sewer system with consideration to impacts from development under the current proposal for UGB – ESA. Within the ESA, there are three primary areas served by the City; Northeast, 435 acres with ID#'s 3101 to 3103, and 3202 to 3212, Hillcrest/Vista Point, 353 acres with ID#'s 4101, 4102, 4201, 4202, 3213, 3214, Southeast, 379 acres with ID#'s 5101, and 5201 to 5206.

Relatively, cost to upsize the sanitary sewer to accommodate ESA areas is as follows: Northeast is the least expensive, Hillcrest is next, Southeast area is the highest. Southeast area could be looked at in a different way; currently there is approximately 500 acres of land in the UGB that is not serviceable without sewer upsizing. If funding was available to upsize for the current UGB, the incremental cost to accommodate the new Southeast area would be low.

If you need further information or clarification, please contact me.



ROGUE VALLEY SEWER SERVICES

Location: 138 West Vilas Road, Central Point, OR - Mailing Address: P.O. Box 3130, Central Point, OR 97502-0005
Tel. (541) 664-6300, Fax (541) 664-7171 www.RVSS.us

April 10, 2013

John Adams
City of Medford Planning
200 S. Ivy St
Medford, OR 97501

RE: UGB Sewer Service Availability

John,

The following document is a summary of the availability of sewer to serve the proposed UGB expansion. Please note that estimating the potential cost would not provide an accurate means to evaluate the cost of serving the growth area. A more accurate means to measure the impact is to base the feasibility of utilizing the growth area based on the distance required to provide sewer mainline to serve the growth area. Also, the exact downstream impacts from commercial type uses are difficult to determine due to the variety of system demand from commercial properties.

Please review this summary and feel free to contact me with any questions concerning the availability study.

Sincerely,

Wade Denny, PE

Wade Denny, P.E.
District Engineer

Digitally signed by Wade Denny, PE
DN: cn=Wade Denny, PE, o=Rogue Valley Sewer
Services, ou=District Engineer, email=wadenny@rvss.us,
c=US
Date: 2013.04.10 07:13:33 -0700

Summary of Sanitary Sewer Availability to ESA

1101: Sewer is available to serve the proposed growth area as follows.

- South half of area can be served by extending 8 inch mainline from existing 8 inch gravity sewer located in Justice Road. The existing 8 inch gravity line flows into a pump station at the corner of Peace and Justice Road. Depending on the type of commercial development, the pump station may need to be upsized to handle the demand.
- North half of area will require a 450' 8 inch mainline from the east.
- Due to the variety of commercial property use, exact downstream impacts are difficult to determine.
- Internal mainline extensions will be required to serve the parcels. Determining the footage of mainline required will depend on the parcel configuration.

1102-1103: Sewer is available within the proposed growth area from the 8 inch and 10 inch mainlines within the growth areas.

- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

1106-1105: Sewer is available from the existing 8 inch sewer within Justice Road.

- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.
- The existing 8 inch gravity line flows into a pump station at the corner of Peace and Justice Road. Depending on the type of commercial development, the pump station may need to be upsized to handle the demand.
- Due to the variety of commercial property use, exact downstream impacts are difficult to determine.

2101: Sewer is available within the proposed growth area.

- Development within this area will require a STEP system to connect to the existing 4 inch pressure line within the growth area.

2102: Sewer is available with the proposed growth area

- Development will require an internal 8 inch mainline extension from the existing mainline located mid growth area.

2103: Sewer is available from a mainline extension of +/- 50' from the 15" sewer main just west of the area in Vilas Road.

- Due to the variety of commercial property use, exact downstream impacts are difficult to determine.
- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

2104: Sewer is available from a mainline extension of +/-600' from the 15" sewer main just west of the area in Vilas Road.

- Due to the variety of commercial property use, exact downstream impacts are difficult to determine.
- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

2201: Sewer is available from a mainline extension of +/-1050' from the 15" sewer main just west of the area in Vilas Road.

- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

2105: Sewer is available from a mainline extension of +/-50' from the 15" sewer main just north of the area in Vilas Road.

- Due to the variety of commercial property use, exact downstream impacts are difficult to determine.
- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

2106: Sewer is available from a mainline extension of +/-750' from the 15" sewer main just west of the area in Vilas Road.

- Due to the variety of commercial property use, exact downstream impacts are difficult to determine.
- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

2202: Sewer is available from an 8 inch mainline extension of +/-1100' from the 15" sewer main just west of the area in Vilas Road.

- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

2108: Sewer is available from an 8 inch mainline extension of +/-366' from the 10" sewer main just south of the area and located on the east side Crater Lake Hwy.

- Due to the variety of commercial property use, exact downstream impacts are difficult to determine.
- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

2203: Sewer is available from an 8 inch mainline extension of +/-1800' from the 10" sewer main southwest of the area and located on the east side Crater Lake Hwy.

- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

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Page 3 of 6

2107: Sewer is available from an 8 inch mainline extension of +/-450' from the 10" sewer main just south of the area and located on the east side Crater Lake Hwy.

- Due to the variety of commercial property use, exact downstream impacts are difficult to determine.
- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

3201: Sewer is available from an 8 inch mainline extension of +/-100' from the 8" sewer main west of the area and located in Coker Butte Road.

- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

3202: Sewer is available from an 8 inch mainline extension of +/-100' from the 8" sewer main west of the area and located in Coker Butte Road.

- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

3203: Sewer is available from an 8 inch mainline extension of +/-1150' from the 8" sewer main west of the area and located in Coker Butte Road.

- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

3205,3206,3101,3204,3207,3102,3103,3208,3211,3209,3210,3212: Service to these areas will require a combination of mainline extensions of varying length and the installation of a minimum of one pump station to be served by RVSS. Some of these areas may be best served by the City.

9201: Service to this area can be obtained by a combination of sewer taps and or mainline extensions from the existing 10 inch mainline in Rossanley Drive.

9202: Sewer is available from existing 8 inch mainline fronting this area in Maple Park Drive and Finley Lane.

- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

9203: Sewer is available from the existing 18 inch mainline fronting the area in Oak Grove Rd.

- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

9204: Sewer is available from the existing 18 inch mainline in Oak Grove Rd and the existing 8 inch mainline in Stewart Ave.

- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

7102: Sewer is available from 8 inch sewer mains in S. Stage Rd and Lillian St.

- Internal mainline extensions from one or more of these mains will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.
- Due to the variety of commercial property use, exact downstream impacts are difficult to determine.

7203: Sewer fronts this area at the corners of Kings Hwy. and S Stage Rd, Experiment Station Rd and Kings Hwy, and on Marsh Lane.

- Internal mainline extensions from one or more of these mains will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

7202: Sewer fronts this area at the intersection of Experiment Station Rd and Marsh Ln.

- Internal mainline extensions from one or more of these mains will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

7201: Sewer is available from existing 8 inch mainline stubbed out along the westerly edge of this area.

- Internal mainline extensions from one or more of these mains will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

7101: Sewer is available from the existing 12 inch mainline stubbed out near the intersection of Myers Lane and Garfield Avenue.

- Internal mainline extensions from this main will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

6301: Sewer is available from the existing 18 inch mainline located at this area northeast corner.

- Internal mainline extensions from this main will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.

6302 and 6101: Sewer is currently serving properties within these areas.

- Internal mainline extensions from this main will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.
- Due to the variety of commercial and industrial property uses the exact downstream impacts are difficult to determine.

5106: Sewer service is available from a 15 inch sewer extension of +/- 1000' from the south.

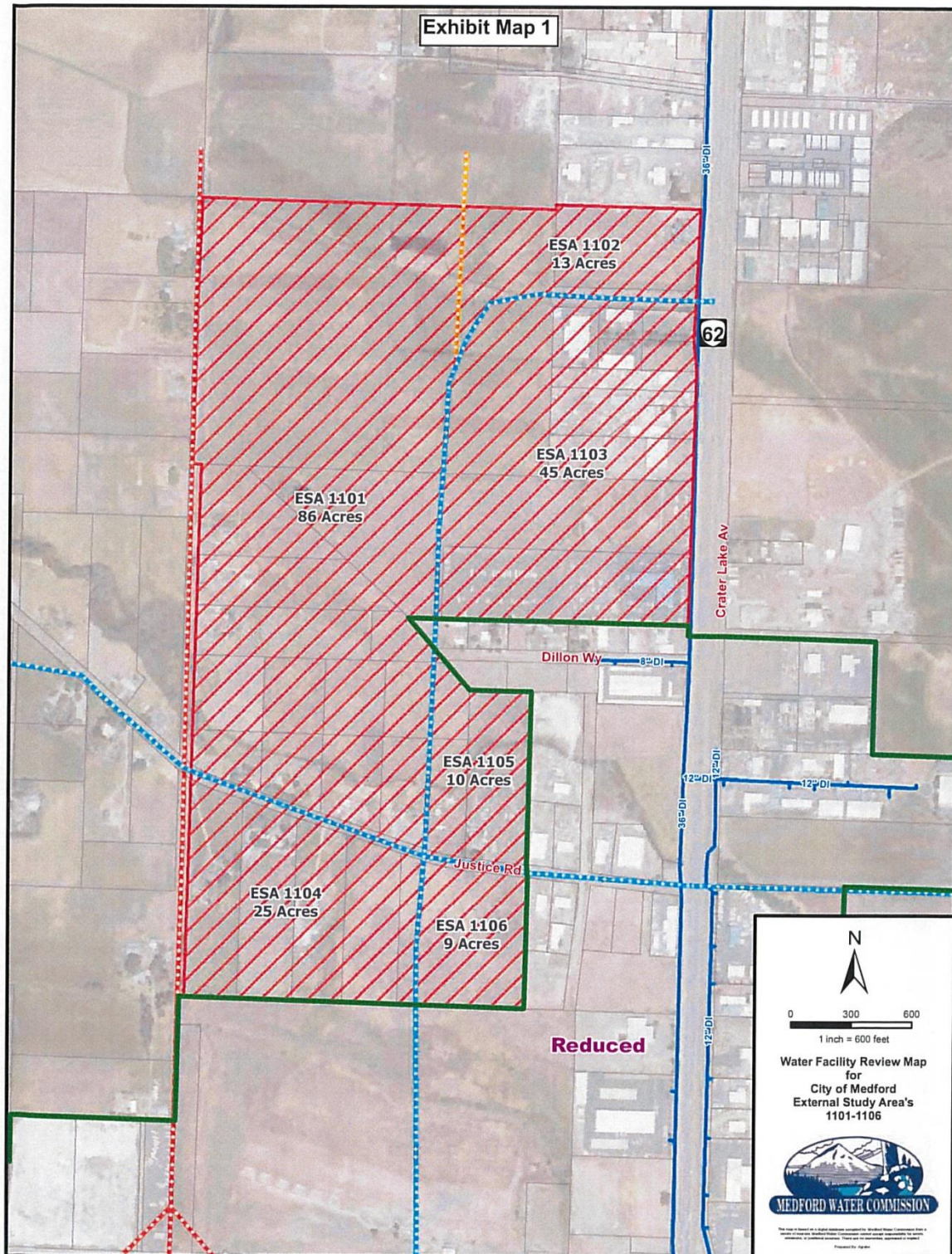
- Internal mainline extensions from this main will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.
- Due to the variety of commercial and industrial property uses the exact downstream impacts are difficult to determine.

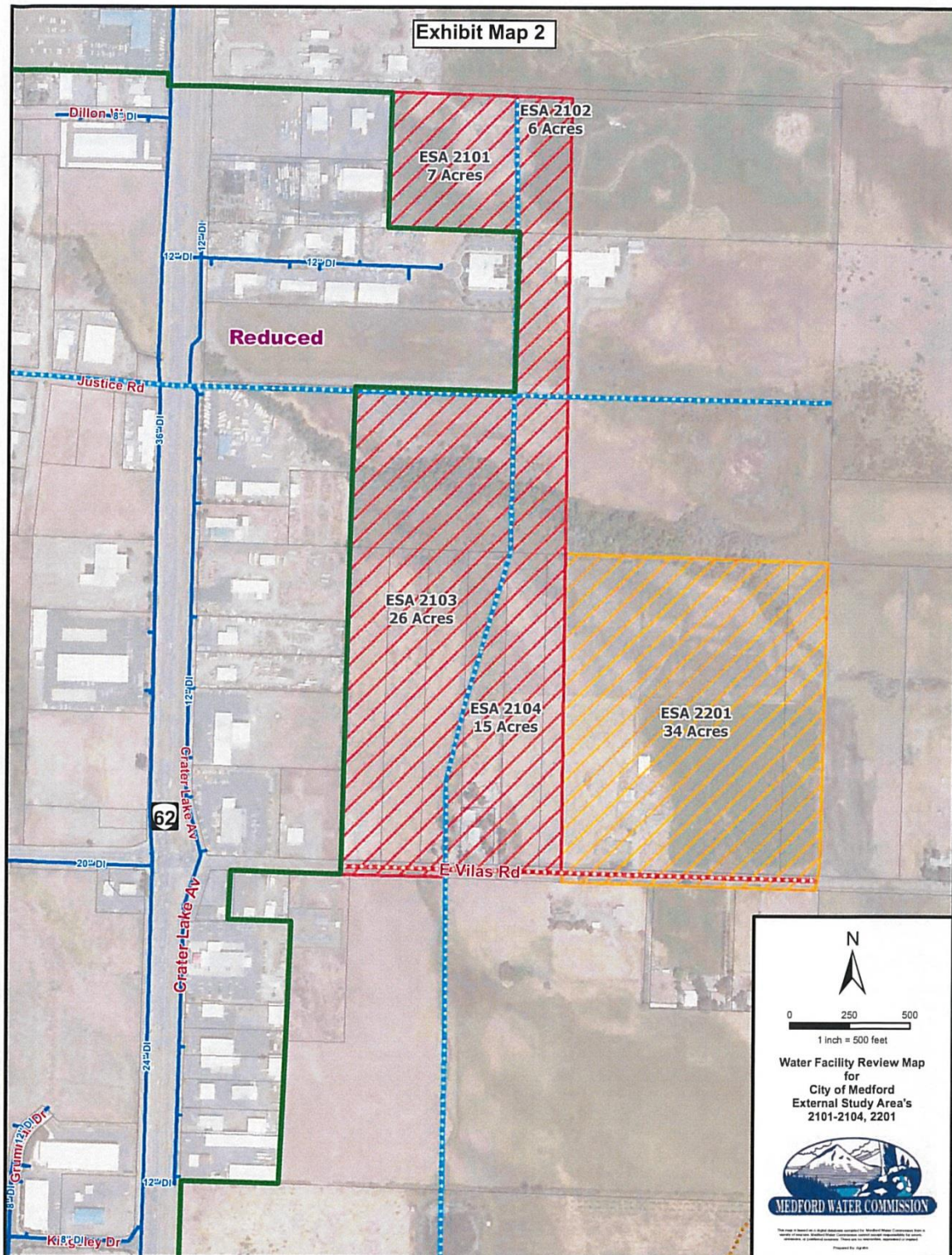
5107: Sewer service is available from a 15 inch sewer extension of +/- 2200' from the south.

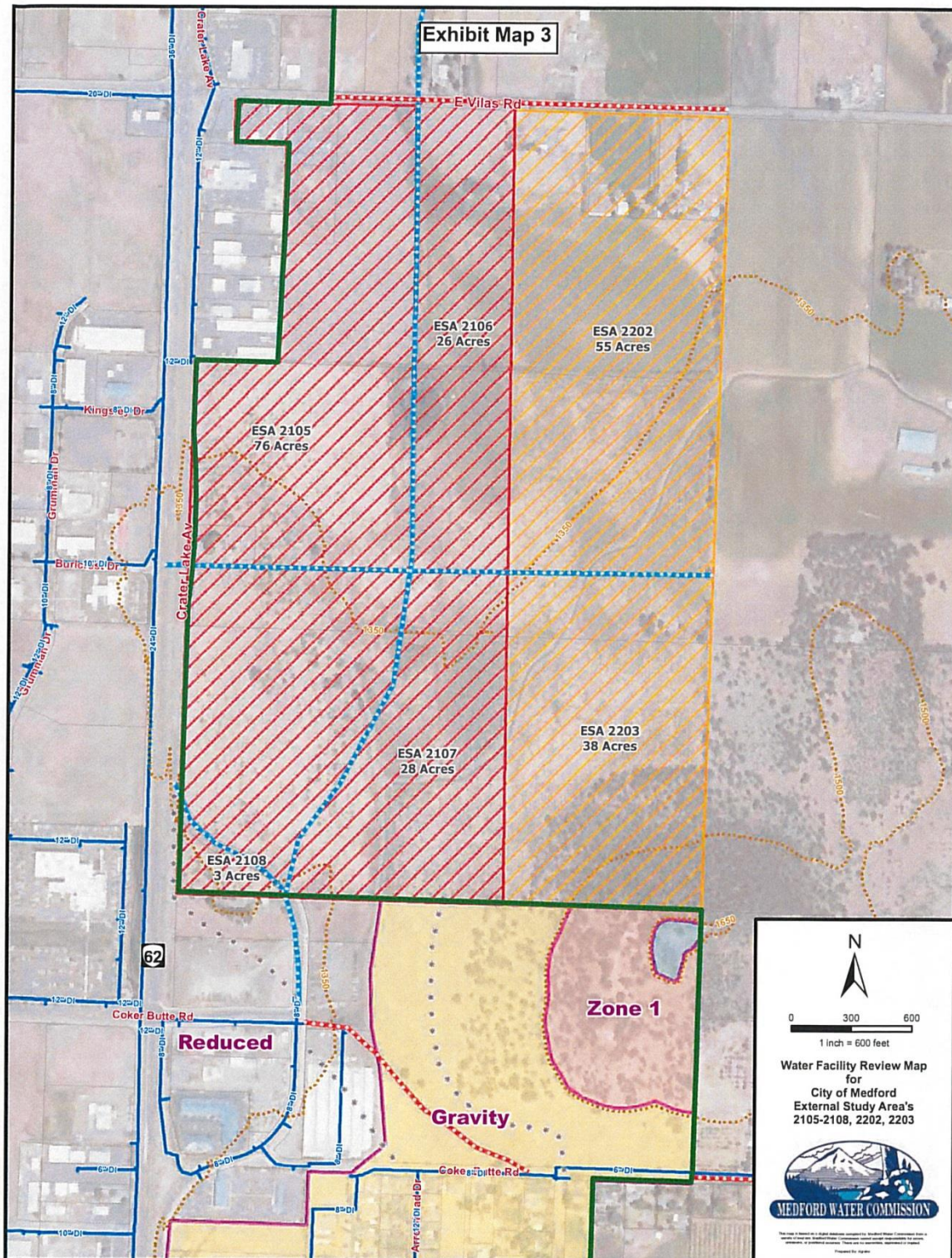
- If sewer is extended to area 5106, the sewer extension would be only about 500 feet.
- Internal mainline extensions will be required to serve the parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.
- Due to the variety of commercial and industrial property uses the exact downstream impacts are difficult to determine.

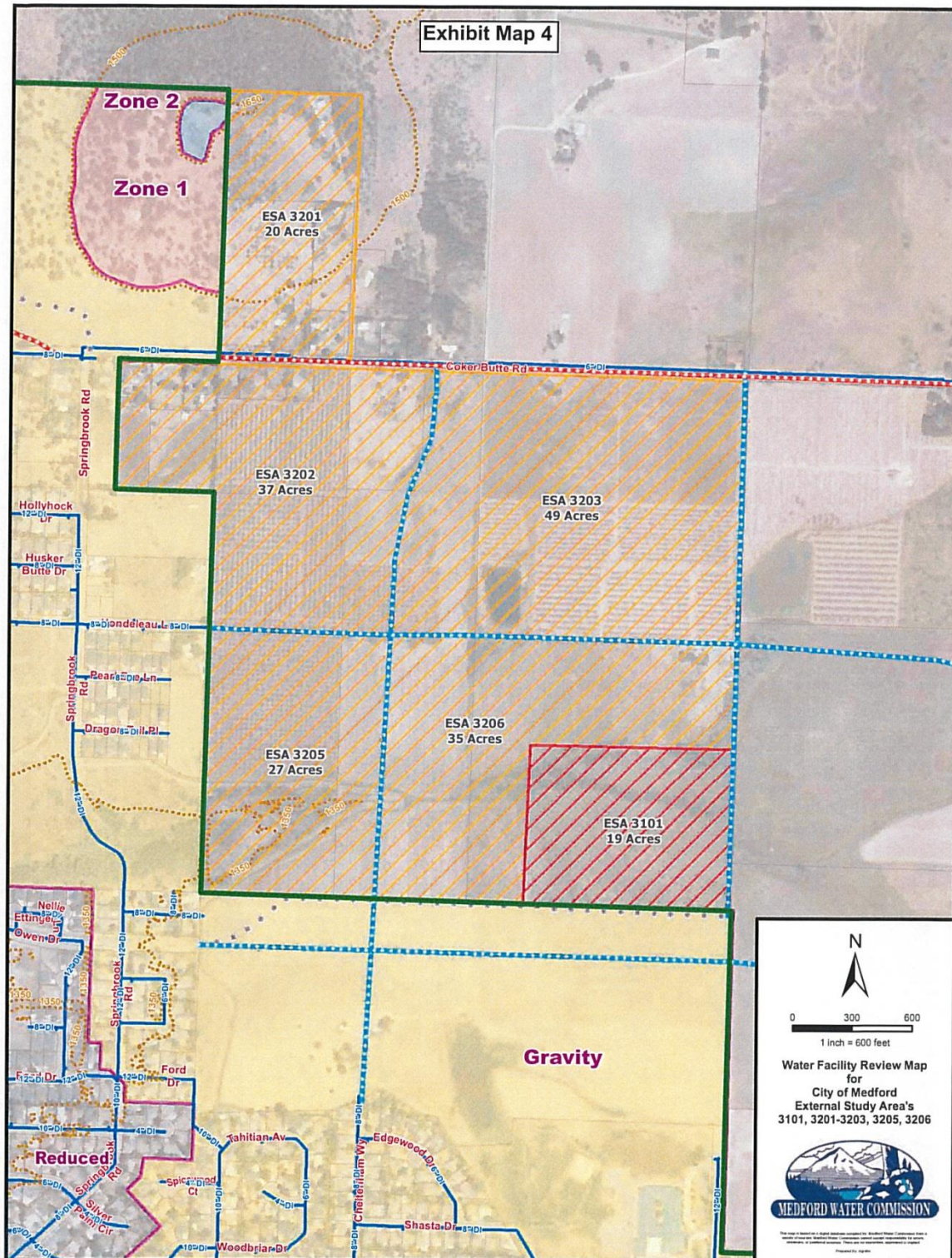
5105, 5104, 5212, 5211, 5209, 5208, 5210, 5102, 5103, and 5207: Sewer is available from a combination of +/- 1500' of 15 inch, 3800' of 12", 1500' of 8" from the south.

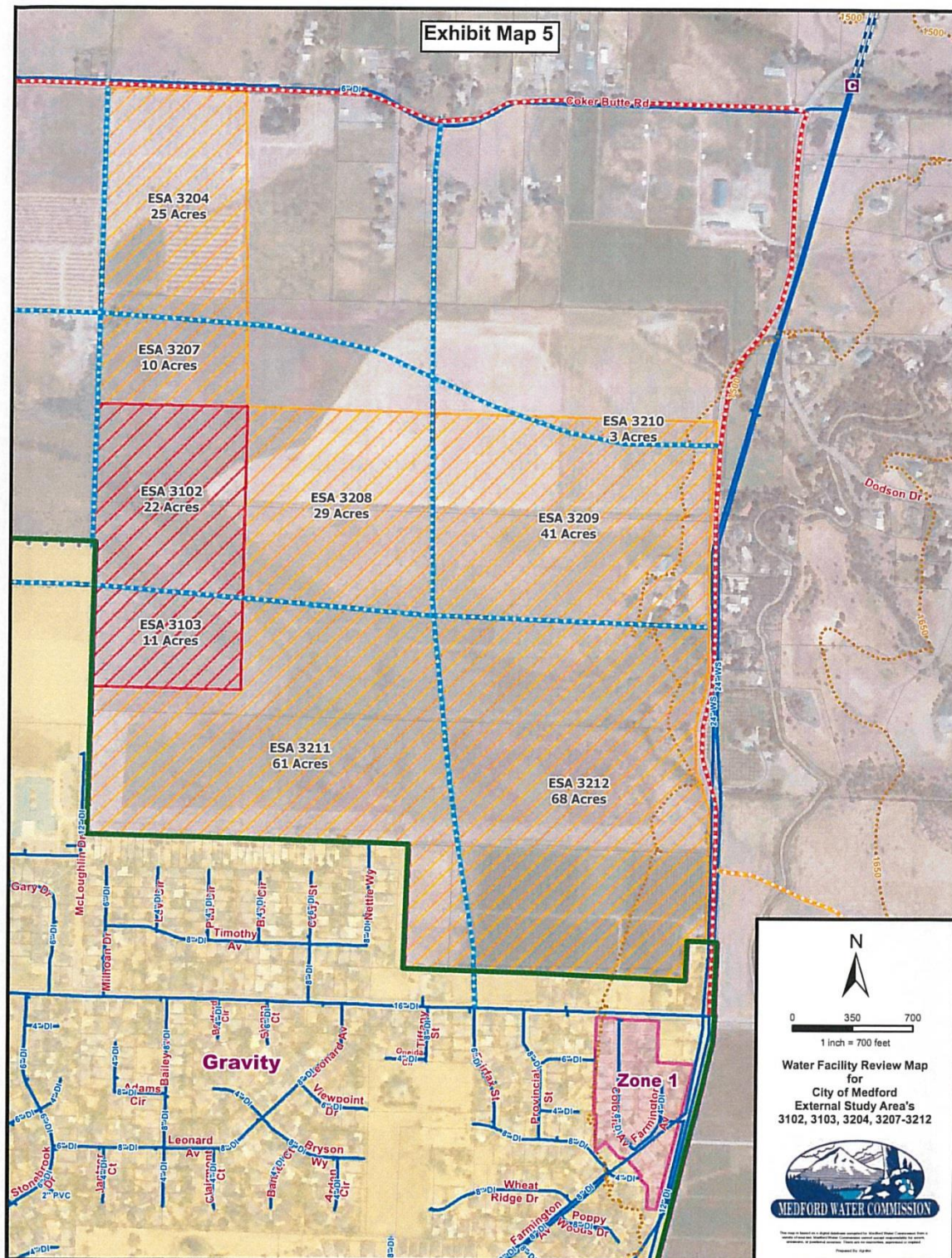
- If sewer is extended to area 5106 or 5107, the above mentioned extension distances will be reduced.
- Internal mainline extensions will be required to serve the internal area parcels. Estimating the footage of mainline required will depend on the parcel configuration, thus an estimate will not be provided.
- Due to the variety of commercial and industrial property uses the exact downstream impacts are difficult to determine.

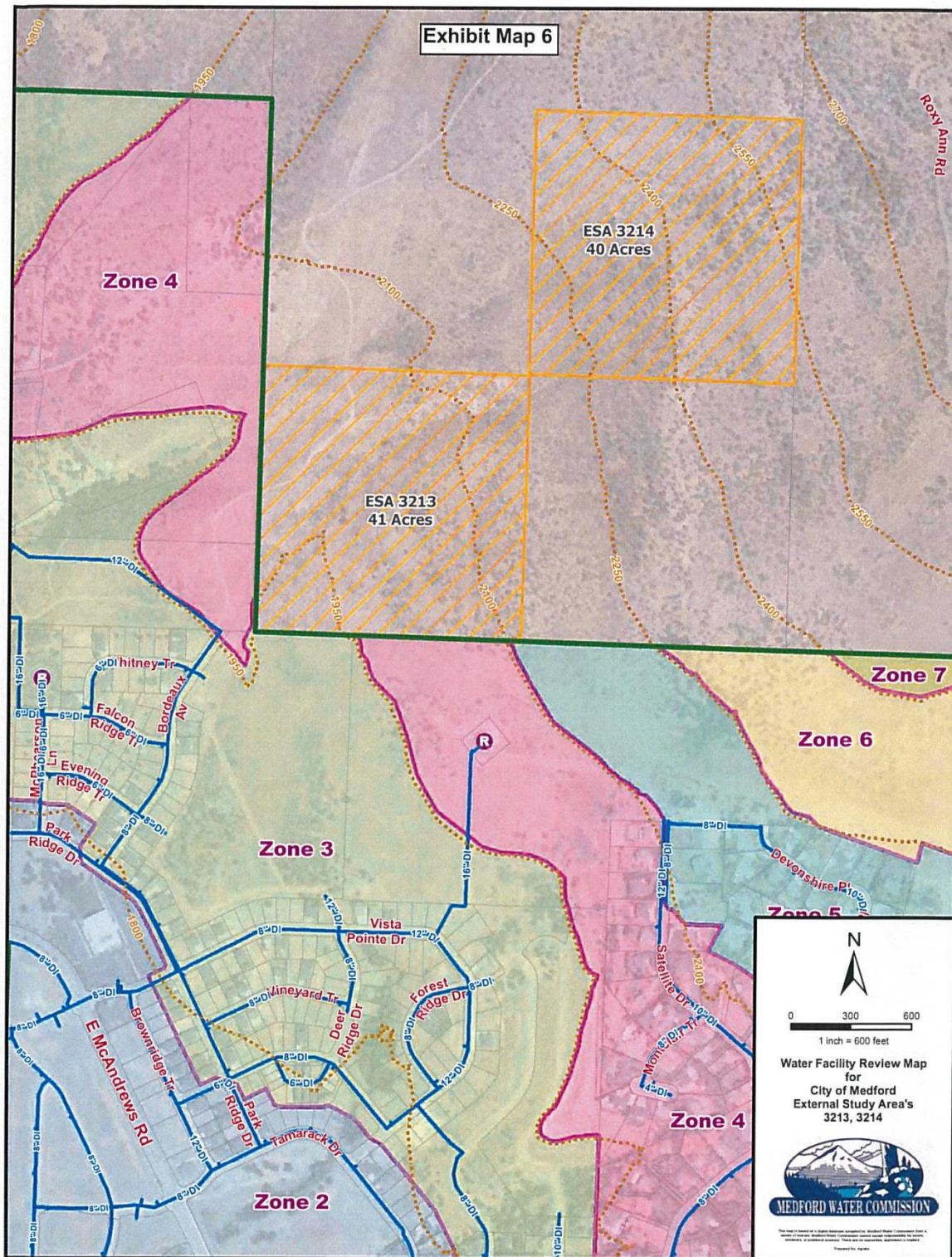


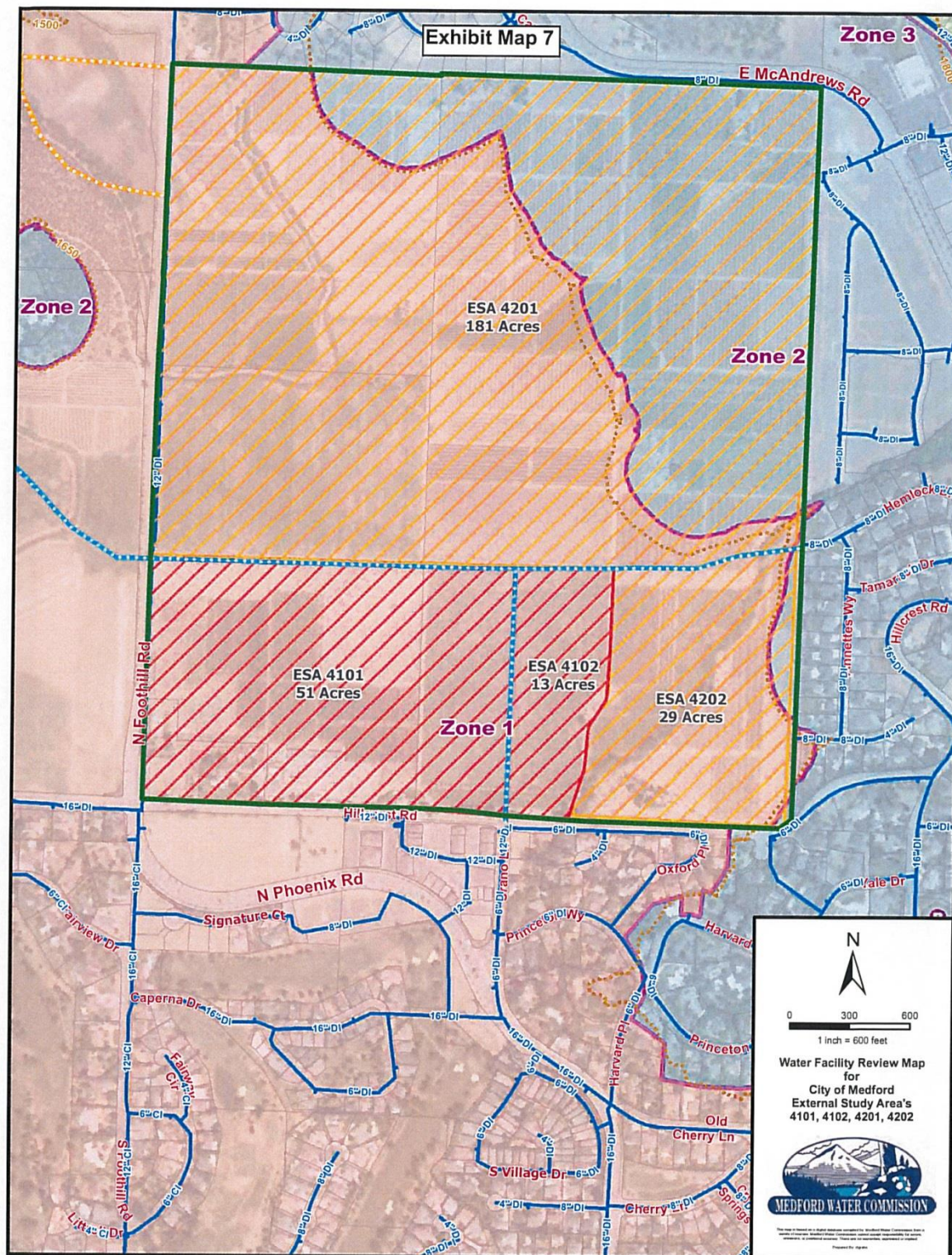


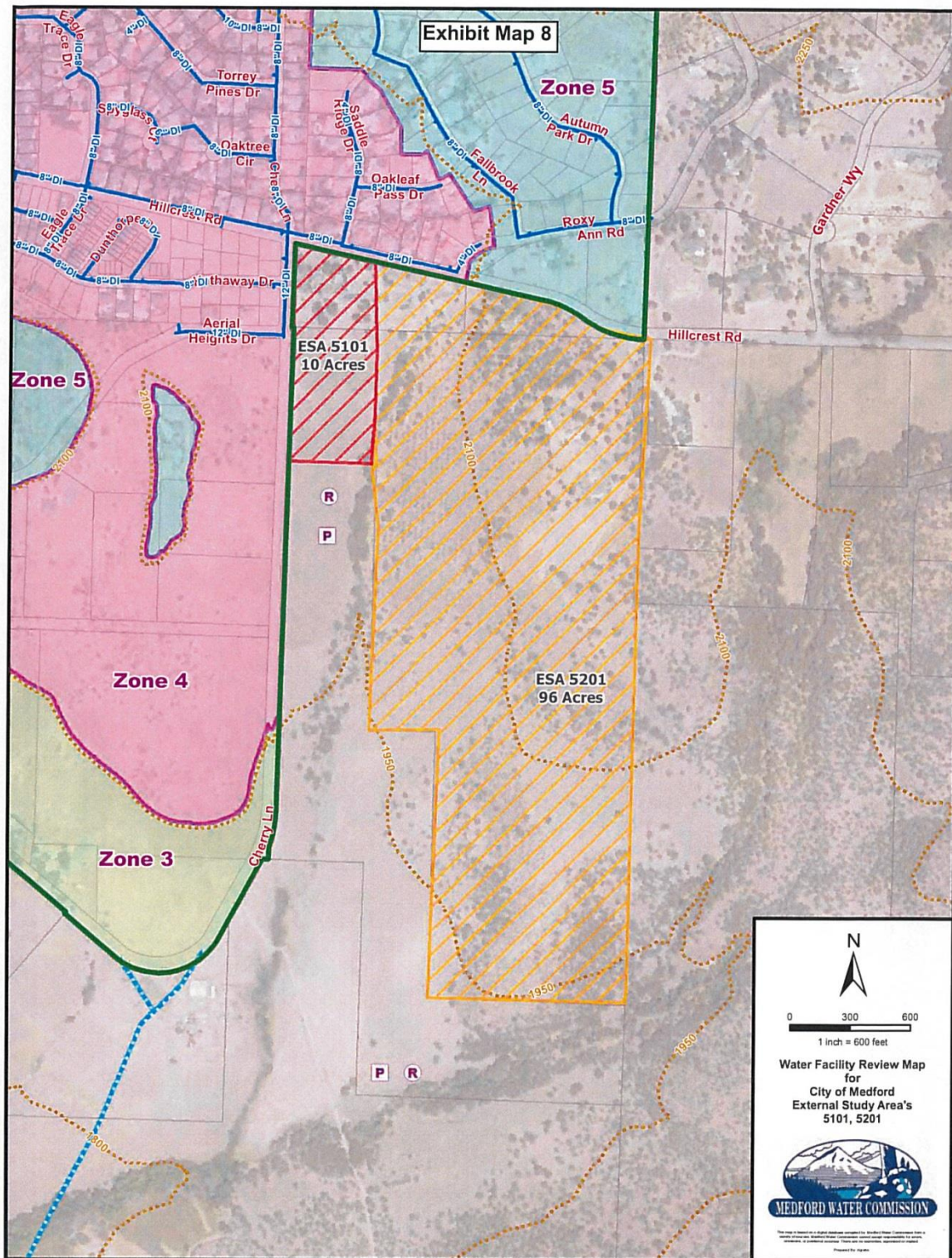


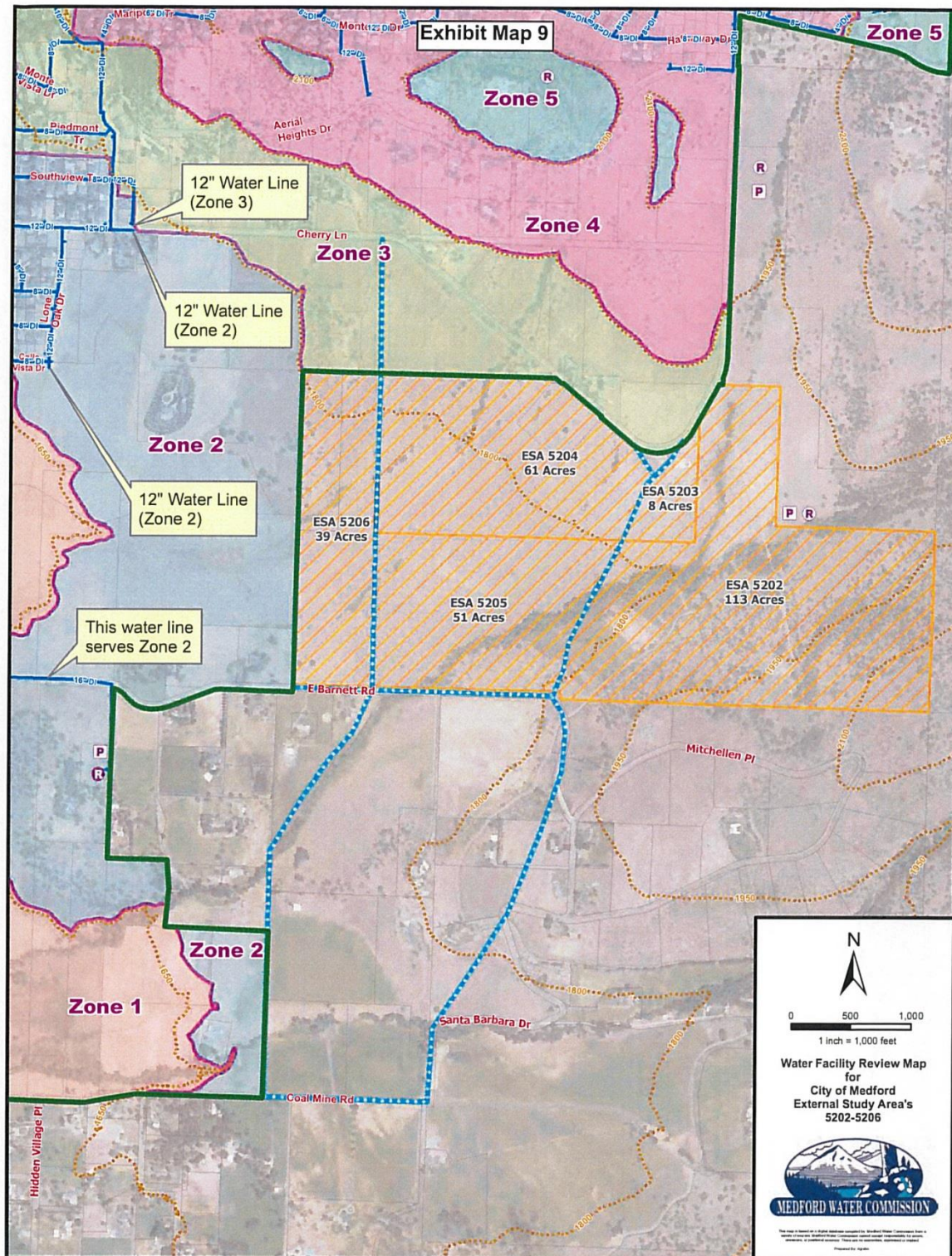


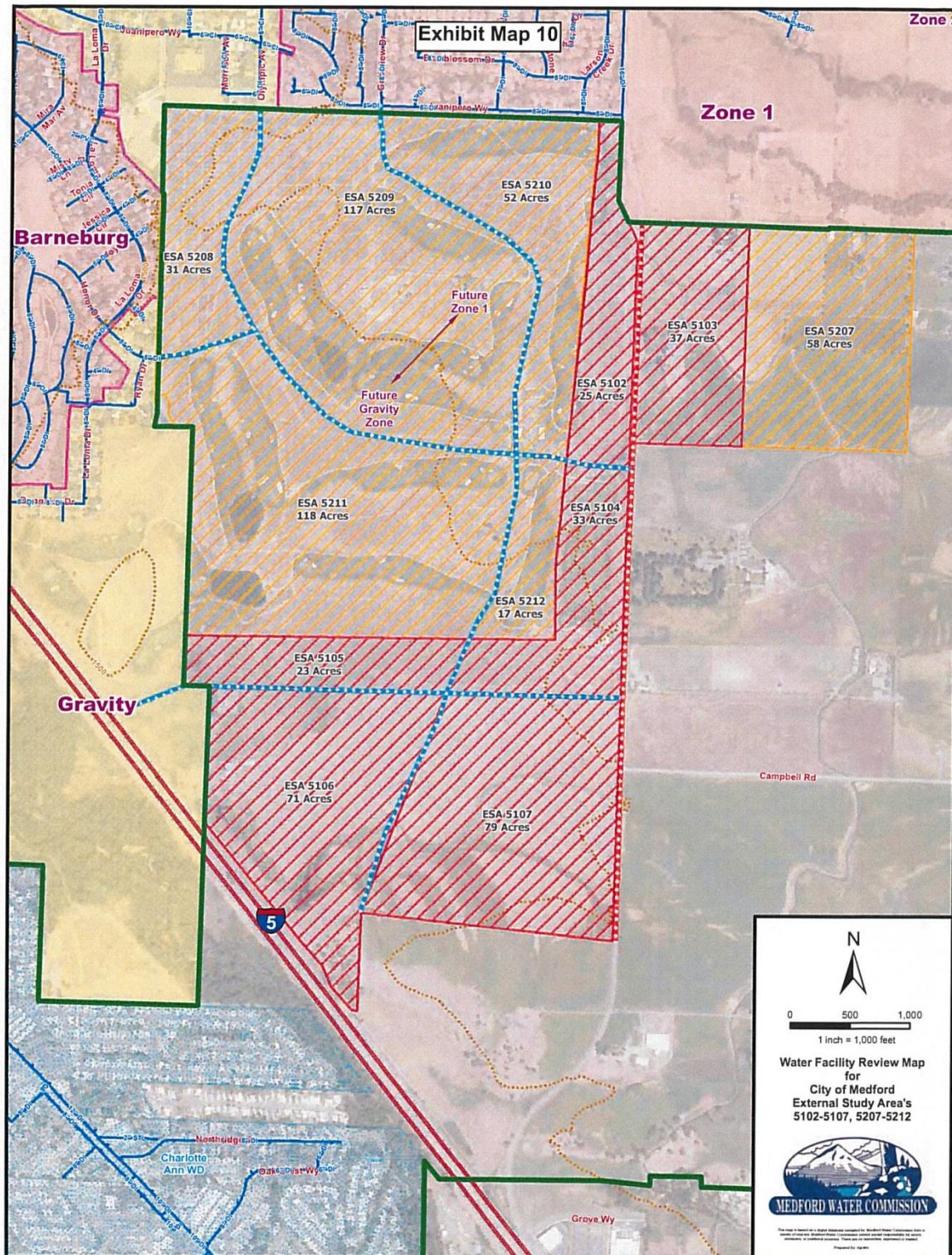


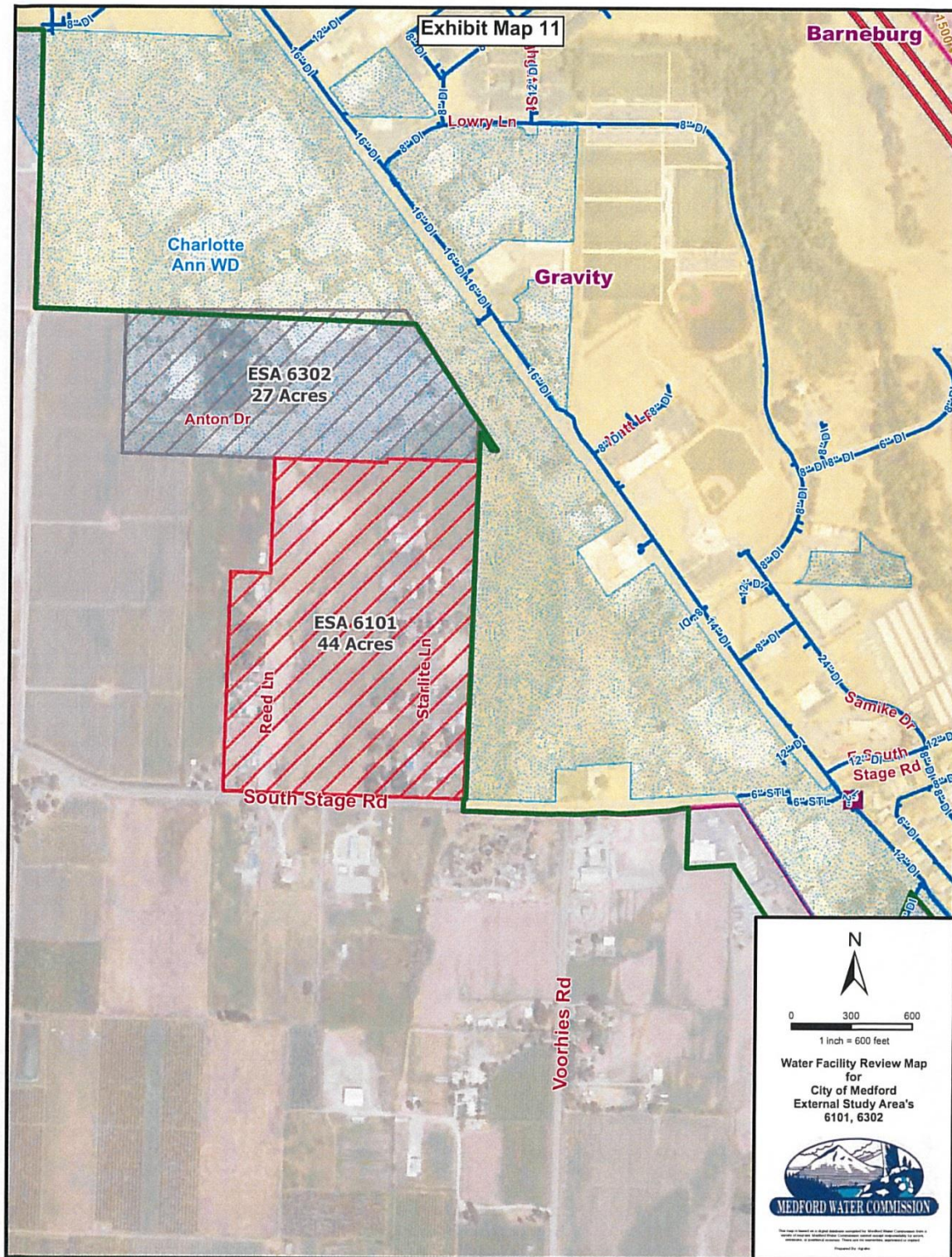


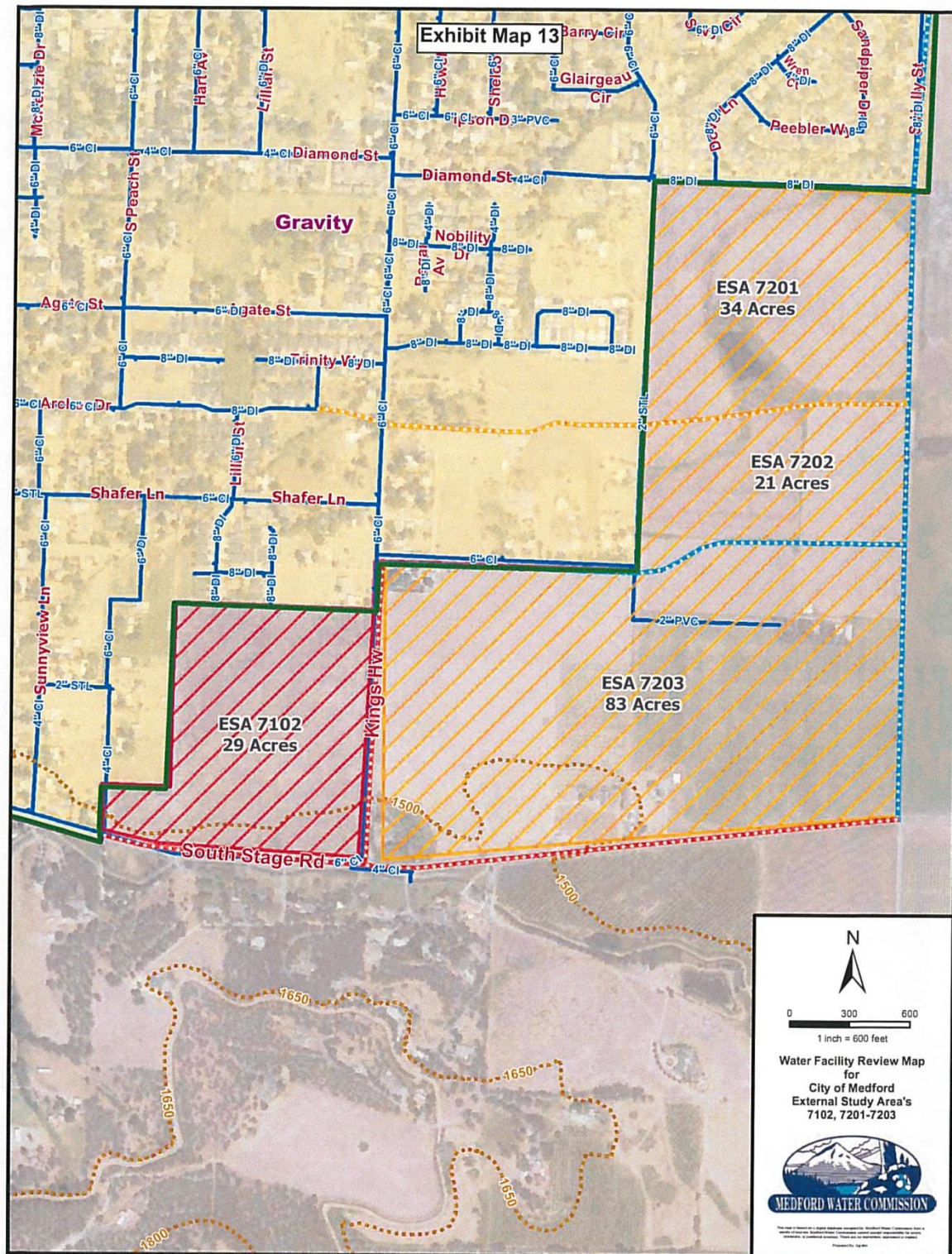


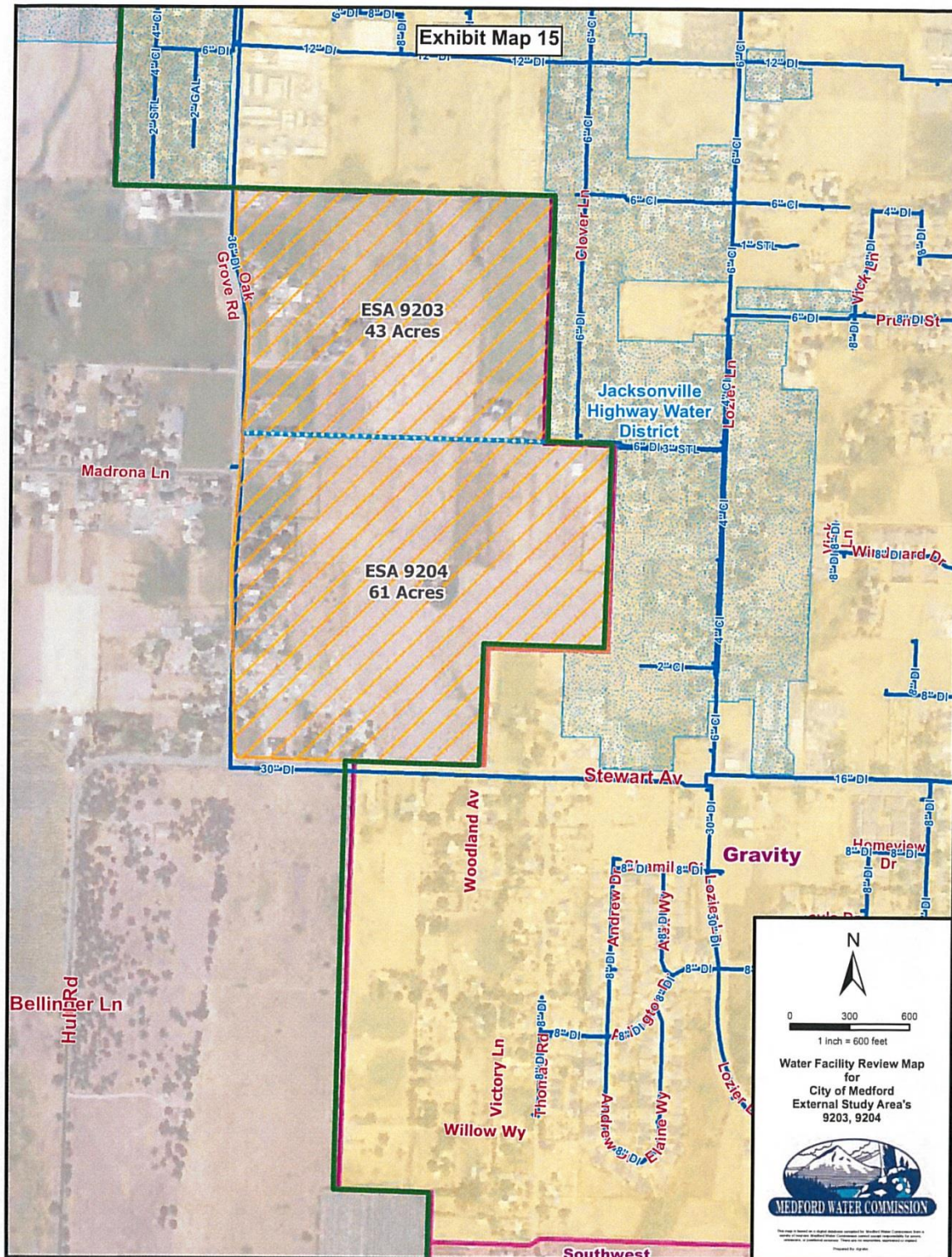


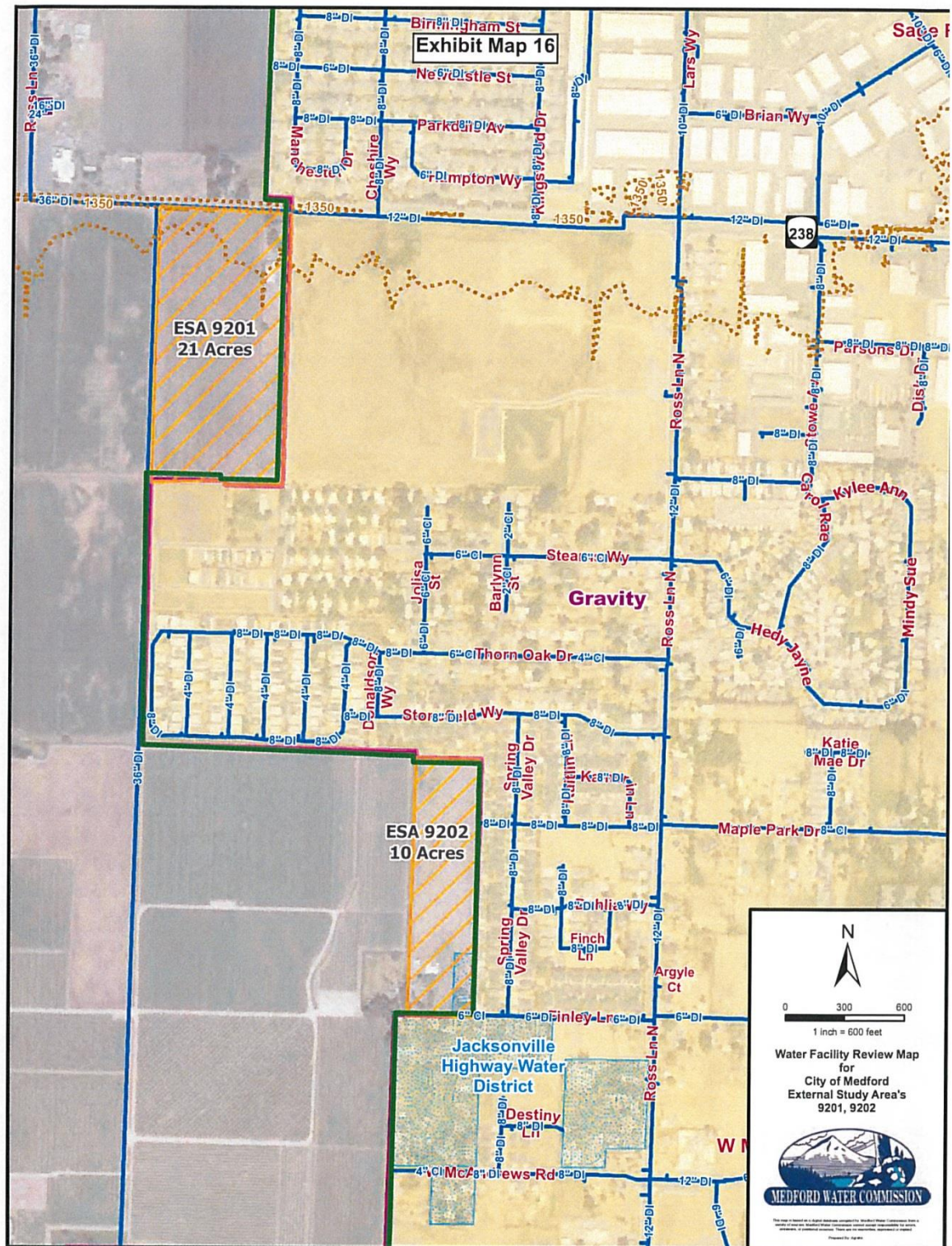












City of Medford - External Study Areas (ESA) Review

By Medford Water Commission

Scoring is based on cost of required improvements made to the domestic water conveyance system.

- (1) High Cost
- (2) Moderate Cost
- (3) Low Cost

Exhibit #	ID	Acres	DUs	Population	EMPESA	Proposed Zoning	MWC Evaluation Comments	MWC Score
1	1101	86.1	0	0	1293	Commercial	ESA 1101 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 36-inch water line along west side of Crater Lake Highway 62 that can serve this area.	2
1	1102	12.9	0	0	194	Commercial	ESA 1102 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 36-inch water line along west side of Crater Lake Highway 62 that can serve this area.	3
1	1103	45.2	0	0	679	Commercial	ESA 1103 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 36-inch water line along west side of Crater Lake Highway 62 that can serve this area.	3
1	1104	24.9	0	0	374	Commercial	ESA 1104 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 36-inch water line along west side of Crater Lake Highway 62 that can serve this area.	2
1	1105	10.4	0	0	156	Commercial	ESA 1105 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 36-inch water line along west side of Crater Lake Highway 62 that can serve this area.	2
1	1106	8.7	0	0	131	Commercial	ESA 1106 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 36-inch water line along west side of Crater Lake Highway 62 that can serve this area.	2
2	2101	6.8	0	0	102	Commercial	ESA 2101 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is an existing 12-inch water line in Crater Lake Avenue at the proposed intersection of Justice Road and Crater Lake Avenue.	2
2	2102	6.2	0	0	94	Commercial	ESA 2102 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is an existing 12-inch water line in Crater Lake Avenue that can serve this area.	2
2	2103	25.7	0	0	386	Commercial	ESA 2103 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is an existing 12-inch water line in Crater Lake Avenue that can serve this area.	2
2	2104	15.4	0	0	231	Commercial	ESA 2104 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is an existing 12-inch water line in Crater Lake Avenue that can serve this area.	2
2	2201	33.7	103	252	0	Residential	ESA 2201 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. There is a 12-inch water line in Crater Lake Avenue that can serve this area.	1

MWC Comments and Scoring for ESA_2034_TAZ populating worksheet.xlsx

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City of Medford - External Study Areas (ESA) Review

By Medford Water Commission

Scoring is based on cost of required improvements made to the domestic water conveyance system.

- (1) High Cost
- (2) Moderate Cost
- (3) Low Cost

Exhibit #	ID	Acres	DUs	Population	EMPESA	Proposed Zoning	MWC Evaluation Comments	MWC Score
3	2105	76.5	0	0	1149	Commercial	ESA 2105 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a existing 24-inch water line on the west side of Crater Lake Hwy, and a 12-inch water line in Crater Lake Avenue near the middle of this ESA that can serve this area.	3
3	2106	25.8	0	0	387	Commercial	ESA 2106 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a existing 24-inch water line on the west side of Crater Lake Hwy, and there is an existing 12-inch water line in Crater Lake Avenue that can serve this area.	2
3	2107	27.9	0	0	419	Commercial	ESA 2107 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a existing 24-inch water line on the west side of Crater Lake Hwy, and there is an existing 12-inch water line in Crater Lake Avenue that can serve this area.	2
3	2108	2.8	0	0	42	Commercial	ESA 2108 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 24-inch water line on the west side of Crater lake Hwy, and there is an existing 12-inch water line in Crater Lake Avenue approximately 2200-feet north of this ESA that can serve this area.	2
3	2202	54.9	167	409	0	Residential	ESA 2202 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. There is a 12-inch water line in Crater Lake Avenue that can serve this area.	1
3	2203	38.2	116	284	0	Residential	ESA 2203 is located in MWC's "Reduced" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. There is a 12-inch water line in Crater Lake Avenue that can serve this area. MWC can not serve domestic water to the area above the ground elevation of 1500 feet located in the southeast portion of this ESA.	1
4	3101	18.6	0	0	279	Commercial	ESA 3101 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 12-inch water line in McLoughlin Drive that can serve this area.	3
4	3201	20.2	61	149	0	Residential	ESA 3201 is located in both MWC's "Gravity" and "Zone 1" pressure zones. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. The area of land above elevation 1500 feet is required to install a pump station and reservoir sized to serve this area. The existing 6-inch water line in Coker Butte Road is undersized to serve domestic and fire protection water to the proposed ESA. A new 12-inch water line is required to be installed in Coker Butte Road starting from Springbrook Road and extending to the east side of this ESA.	1

City of Medford - External Study Areas (ESA) Review
By Medford Water Commission

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- (3) Low Cost

Exhibit #	ID	Acres	DUs	Population	EMPESA	Proposed Zoning	MWC Evaluation Comments	MWC Score
4	3202	36.8	112	274	0	Residential	ESA 3202 is located in both MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. The existing 6-inch water line in Coker Butte Road is undersized to serve domestic and fire protection water to the proposed ESA. A new 12-inch water line is required to be installed in Coker Butte Road starting from Springbrook Road and extending to the east side of this ESA.	2
4	3203	49.2	150	368	0	Residential	ESA 3203 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. The existing 6-inch water line in Coker Butte Road is undersized to serve domestic and fire protection water to the proposed ESA. A new 12-inch water line is required to be installed in Coker Butte Road starting from Springbrook Road and extending to the east side of this ESA.	1
4	3205	26.7	81	198	0	Residential	ESA 3205 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. There are 8-inch water lines stubbed for extension in Hondeleau Lane, Sharman Way, and Kingsbury Drive. New 8-inch water lines are required to be installed in proposed residential streets within this ESA.	3
4	3206	34.5	105	257	0	Residential	ESA 3206 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. There is a 8-inch water line stubbed for extension in Cheltenham Way. New 8-inch water lines are required to be installed in proposed residential streets within this ESA.	2
5	3102	21.6	0	0	325	Commercial	ESA 3102 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 12-inch water line in McLoughlin Drive that can serve this area.	3
5	3103	11.1	0	0	167	Commercial	ESA 3103 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 12-inch water line in McLoughlin Drive that can serve this area.	3
5	3204	25.1	77	189	0	Residential	ESA 3204 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. There is a 6-inch water line in Coker Butte Road. The existing 6-inch water line in Coker Butte Road is undersized to serve domestic and fire protection water to the proposed ESA. A new 12-inch water line is required to be installed in Coker Butte Road starting from Springbrook Road and extending to the east side of this ESA.	1

City of Medford - External Study Areas (ESA) Review
By Medford Water Commission

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Exhibit #	ID	Acres	DUs	Population	EMPESA	Proposed Zoning	MWC Evaluation Comments	MWC Score
5	3207	9.9	30	74	0	Residential	ESA 3207 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. There is a 6-inch water line in Coker Butte Road, and 12-inch water line in McLoughlin Drive. The existing 6-inch water line in Coker Butte Road is undersized to serve domestic and fire protection water to the proposed ESA. A new 12-inch water line is required to be installed in Coker Butte Road starting from Springbrook Road. New 8-inch water lines are required to be installed in proposed residential streets within this ESA.	1
5	3208	28.6	87	213	0	Residential	ESA 3208 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. There is a 6-inch water line in Coker Butte Road, a 24-inch water line in or near Foothill Road, and a 16-inch water line in Delta Waters Road at Fairfax Street. New 8-inch water lines are required to be installed in proposed residential streets within this ESA.	1
5	3209	41.2	126	309	0	Residential	ESA 3209 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. There is a 6-inch water line in Coker Butte Road, a 16-inch water line in Delta Waters Road at Fairfax Street, and a 24-inch water line in or near Foothills Road. New 8-inch water lines are required to be installed in proposed residential streets within this ESA.	3
5	3210	2.9	9	22	0	Residential	ESA 3210 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. There is 24-inch water line in or near Foothills Road. New 8-inch water lines are required to be installed in proposed residential streets within this ESA.	3
5	3211	60.7	185	453	0	Residential	ESA 3211 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. There is 12-inch water line in McLoughlin Drive, and a 8-inch water line in Nettle Way. New 8-inch water lines are required to be installed in proposed residential streets within this ESA.	3
5	3212	68.2	208	510	0	Residential	ESA 3212 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. There is 24-inch water line in or near Foothills Road, and a 16-inch water line in Delta Waters Road at Fairfax Street. New 8-inch water lines are required to be installed in proposed residential streets within this ESA.	3
6	3213	40.5	124	304	0	Residential	ESA 3213 is located in three (3) of MWC's pressure zones; Zones 3, 4 and 5. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. There are 8-inch water lines available for Zone 4 and 5 at the north end of Satellite Drive; and a 8-inch water line at the north end of Bordeaux Avenue for Zone 3. New 8-inch water lines are required to be installed in proposed residential streets within this ESA. This ESA will be difficult and expensive to develop due to the steep terrain and the required construction of water reservoirs, pump stations, and extensive water water lines.	1

MWC Comments and Scoring for ESA_2034_TAZ populating worksheet.xls

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City of Medford - External Study Areas (ESA) Review
By Medford Water Commission

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Exhibit #	ID	Acres	DUs	Population	EMPESA	Proposed Zoning	MWC Evaluation Comments	MWC Score
6	3214	39.9	122	299	0	Residential	ESA 3214 is located in four (4) of MWC's pressure zones; Zones 5, 6, 7 and 8. This ESA is proposed to be zoned Residential. Pressure zones 6, 7 and 8 do not currently exist and will require construction of a pump station and reservoir for each zone, along with property acquisition for each facility site. This ESA will be difficult and extremely expensive to develop due to the steep terrain and the magnitude of required construction of off-site water facilities and water line extensions that need to be constructed to this ESA.	1
7	4101	50.7	0	0	762	Commercial	ESA 4101 is located in both MWC's "Zone 1" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 12-inch water line in Hillcrest Road to serve this area.	3
7	4102	12.6	0	0	190	Commercial	ESA 4102 is located in both MWC's "Zone 1" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 12-inch water line in Hillcrest Road approximately 500 feet west of Urano Lane to serve this area.	3
7	4201	181.3	553	1,355	0	Residential	ESA 4201 is located in both MWC's "Zone 1" and "Zone 2" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. For the "Zone 1" pressure zone area there is a 12-inch water line in N. Foothill Road, an 8-inch water line in La Strada Circle, and a 6-inch water line in Hillcrest Road adjacent to this ESA. For the "Zone 2" pressure zone area there is an 8-inch water line in Hemlock Drive, and an 8-inch water line is also located in the East McAndrews Village development along the east side of this ESA.	2
7	4202	28.5	87	213	0	Residential	ESA 4202 is located in both MWC's "Zone 1" and "Zone 2" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. There is a 12-inch water line in Hillcrest Road approximately 500 feet west of Urano Lane that would be required to be extended across ESA 4102, then 8-inch water lines can be extended into this ESA.	2
8	5101	9.9	0	0	149	Commercial	ESA 5101 is located in MWC's "Zone 4" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 12-inch water line in Cherry Lane, and an 8-inch water line in Hillcrest Road that can serve this area.	3
8	5201	95.8	292	715	0	Residential	ESA 5201 is located in MWC's "Zone 4" and "Zone 5" pressure zones. This ESA is proposed to be zoned Residential. Residential zoning requires installation of 8-inch water lines. There is a 12-inch water line in Cherry Lane that can serve the area of this ESA that lies within "Zone 4" pressure zone. There is 8-inch water line in Roxy Ann Road that can serve this area of this ESA that lies within "Zone 5" pressure zone.	3

City of Medford - External Study Areas (ESA) Review
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Exhibit #	ID	Acres	DUs	Population	EMPESA	Proposed Zoning	MWC Evaluation Comments	MWC Score
9	5202	113.4	346	848	0	Residential	ESA 5202 is located in MWC's "Zone 3", "Zone 4, and "Zone 5" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a "Zone 3" 12-inch water line in Cherry Lane approximately 200-feet east of Mary Bee Lane that can serve this area. This 12-inch water line is required to be extended easterly in Cherry Lane, then 8-inch water lines are required to be extended on-site. There is a "Zone 4" 12-inch water line in Cherry Lane at Aerial Heights Drive. There is a "Zone 5" 8-inch water line in Roxy Ann Road at Fallbrook Lane.	1
9	5203	7.9	24	59	0	Residential	ESA 5203 is located in MWC's "Zone 3" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a 12-inch water line in Cherry Lane approximately 200-feet east of Mary Bee Lane that can serve this area. This 12-inch water line is required to be extended easterly in Cherry Lane, then 8-inch water lines are required to be extended on-site.	1
9	5204	61.5	187	458	0	Residential	ESA 5204 is located in both MWC's "Zone 2" and "Zone 3" pressure zones. This ESA is proposed to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a "Zone 3" 12-inch water line in Cherry Lane approximately 200-feet east of Mary Bee Lane that can serve this area. This "Zone 3" 12-inch water line is required to be extended easterly in Cherry Lane, then 8-inch water lines are required to be extended on-site. There is a "Zone 2" 12-inch water line in Cherry Lane approximately 200-feet east of Mary Bee Lane that can be extended easterly in Cherry Lane, then 8-inch water lines are required to be extended on-site to serve the "Zone 2" area of this ESA.	1
9	5205	51.5	157	385	0	Residential	ESA 5205 is located in MWC's "Zone 2" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a "Zone 2" 12-inch water line in Cherry Lane approximately 200-feet east of Mary Bee Lane that can be extended easterly in Cherry Lane, then 8-inch water lines are required to be extended on-site to serve the "Zone 2" area of this ESA.	1
9	5206	38.8	118	289	0	Residential	ESA 5206 is located in MWC's "Zone 2" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a "Zone 2" 12-inch water line in Cherry Lane approximately 200-feet east of Mary Bee Lane that can be extended easterly in Cherry Lane, then 8-inch water lines are required to be extended on-site to serve the "Zone 2" area of this ESA.	1
10	5102	25.1	0	0	377	Commercial	ESA 5102 is located in MWC's "Zone 1" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires the installation of 12-inch water lines. There is a 16-inch water line in N. Phoenix Road at Juanipero Way that can serve this area. The 16-inch water line is required to be extended southerly in N. Phoenix Road, and 12-inch water lines are required to be extended on-site.	2

City of Medford - External Study Areas (ESA) Review

By Medford Water Commission

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Exhibit #	ID	Acres	DUs	Population	EMPESA	Proposed Zoning	MWC Evaluation Comments	MWC Score
10	5103	37.4	0	0	562	Commercial	ESA 5103 is located in MWC's "Zone 1" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires the installation of 12-inch water lines. There is a 16-inch water line in N. Phoenix Road at Juanipero Way that can serve this area. The 16-inch water line is required to be extended southerly in N. Phoenix Road, and 12-inch water lines are required to be extended on-site.	2
10	5104	33.4	0	0	502	Commercial	ESA 5104 is located in MWC's "Zone 1" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 16-inch water line in N. Phoenix Road at Juanipero Way that can serve this area. The 16-inch water line is required to be extended southerly in N. Phoenix Road, and 12-inch water lines are required to be extended on-site.	2
10	5105	22.7	0	0	342	Commercial	ESA 5105 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 12-inch water line in South Stage Road west of Interstate 5 that can serve this area. The 12-inch water line is required to be extended across Interstate 5, and 12-inch water lines are required to be extended on-site.	1
10	5106	71.3	0	0	1071	Commercial	ESA 5106 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 12-inch water line in South Stage Road west of Interstate 5 that can serve this area. The 12-inch water line is required to be extended across Interstate 5, and 12-inch water lines are required to be extended on-site.	1
10	5107	79.4	0	0	1192	Commercial	ESA 5107 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires installation of 12-inch water lines. There is a 16-inch water line in N. Phoenix Road at Juanipero Way that can serve this area. The 16-inch water line is required to be extended southerly in N. Phoenix Road, and 12-inch water lines are required to be extended on-site.	1
10	5207	57.8	176	431	0	Residential	ESA 5207 is located in MWC's "Zone 1" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a "Zone 1" 16-inch water line in N. Phoenix Road at Juanipero Way that can be extended southerly in N. Phoenix Road, then 8-inch water lines are required to be extended easterly in Coal Mine Road and then on-site to serve this area of this ESA.	2
10	5208	31.1	95	233	0	Residential	ESA 5208 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a "Gravity" zone 8-inch water line in Honor Drive, and a 6-inch water line in Olympic Avenue that can serve this area.	3
10	5209	117.3	358	877	0	Residential	ESA 5209 is located in MWC's "Zone 1" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a "Zone 1" 8-inch water line in Juanipero Way that can serve this area.	3

City of Medford - External Study Areas (ESA) Review

By Medford Water Commission

Scoring is based on cost of required improvements made to the domestic water conveyance system.

- (1) High Cost
- (2) Moderate Cost
- (3) Low Cost

Exhibit #	ID	Acres	DUs	Population	EMPESA	Proposed Zoning	MWC Evaluation Comments	MWC Score
10	5210	51.9	158	387	0	Residential	ESA 5210 is located in MWC's "Zone 1" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a "Zone 1" 8-inch water line in Juanipero Way that can serve this area.	3
10	5211	118.3	360	882	0	Residential	ESA 5211 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a "Gravity" zone 8-inch water line in Honor Drive that can serve this area.	2
10	5212	16.6	51	125	0	Residential	ESA 5212 is located in MWC's "Zone 1" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a "Zone 1" 16-inch water line in Juanipero Way, and there is a "Zone 1" 16-inch water line in N. Phoenix Road at Juanipero Way that can serve this area.	2
11	6101	43.7	0	0	656	Commercial	ESA 6101 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires the installation of 12-inch water lines. There is a "Gravity" zone 16-inch water line along the east side of Hwy 99, and a 14-inch water line along the east side of Hwy 99 at South Stage Road.	2
11	6302	27.5	0	0	413	Industrial	ESA 6302 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires the installation of 12-inch water lines. There is a "Gravity" zone 16-inch water line located on the east side of S. Pacific Hwy 99 to serve this area.	2
12	6301	2.9	0	0	43	Industrial	ESA 6301 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires the installation of 12-inch water lines. There is a "Gravity" zone 12-inch water line located at the southerly end of Anton Drive to serve this area.	3
12	7101	48.8	0	0	733	Commercial	ESA 7101 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There are "Gravity" zone 8-inch water lines in Meyers Lane and S. Holly Street. There is also a "Gravity" zone 24-inch water line in Garfield Avenue to serve this area.	3
13	7102	29.4	0	0	441	Commercial	ESA 7102 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Commercial. Commercial zoning requires the installation of 12-inch water lines. There is no 12-inch water lines in this area as this is an established residential area. Garfield Street has a "Gravity" zone 24-inch water line that can serve this area. A 12-inch water line extension (approx. 4700-ft) would be required in Kings Hwy, and on-site 12-inch water lines. Due to low water pressures in the area, this ESA and the surrounding residential area extending up to Diamond Street may be required to be converted from the "Gravity" pressure zone to the "Southwest" pressure zone.	1
13	7201	33.5	102	250	0	Residential	ESA 7201 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a 8-inch water line in Sparrow Way and S Holly Street to serve this area.	3

MWC Comments and Scoring for ESA_2034_TAZ populating worksheet.xlsx

8 of 9

City of Medford - External Study Areas (ESA) Review

By Medford Water Commission

Scoring is based on cost of required improvements made to the domestic water conveyance system.

- (1) High Cost
- (2) Moderate Cost
- (3) Low Cost

Exhibit #	ID	Acres	DUs	Population	EMPESA	Proposed Zoning	MWC Evaluation Comments	MWC Score
13	7202	20.9	64	157	0	Residential	ESA 7202 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a 8-inch water line in Sparrow Way and S Holly Street to serve this area.	3
13	7203	82.8	252	617	0	Residential	ESA 7203 is located in MWC's "Gravity" pressure zone. This ESA is proposed to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a 8-inch water line in Sparrow Way to serve this area. Due to low water pressures in the area, this ESA and the surrounding residential area extending up to Diamond Street may be required to be converted from the "Gravity" pressure zone to the "Southwest" pressure zone.	1
14	8101	7.4	0	0	111	Commercial	ESA 8101 is located in MWC's "Southwest" pressure zone. This ESA is to be zoned Commercial. Commercial zoning requires the installation of 12-inch water lines. There is a 12-inch water line in Orchard Home Drive at Alamar Street to serve this area.	3
14	8201	48.2	147	360	0	Residential	ESA 8201 is located in MWC's "Southwest" pressure zone. This ESA is to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a 12-inch water line in Orchard Home Drive at Alamar Street, a 12-inch water line in Columbus Avenue, and 8-inch water lines in Terrel Drive and Martin Drive, and 6-inch water lines in Canal Street, Meals Drive, and Milford Drive to serve this area.	3
15	9203	43.2	132	323	0	Residential	ESA 9203 is located in MWC's "Gravity" pressure zone. This ESA is to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a 6-inch water line in Clover Lane and Sunset Court, and a 36-inch water line along the west boundary of this ESA that will serve this area.	3
15	9204	61.4	187	458	0	Residential	ESA 9204 is located in MWC's "Gravity" pressure zone. This ESA is to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a 6-inch water line in Clover Lane and Sunset Court, and a 30-inch water line along the west and south boundary of this ESA that will serve this area.	3
16	9201	20.8	63	154	0	Residential	ESA 9201 is located in MWC's "Gravity" pressure zone. This ESA is to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a 36-inch water along the west side of this property, and a 12-inch water in Hwy 238 to the north of this property that will serve this area.	3
16	9202	9.6	29	71	0	Residential	ESA 9202 is located in MWC's "Gravity" pressure zone. This ESA is to be zoned Residential. Residential zoning requires the installation of 8-inch water lines. There is a 8-inch water in Maple Park Drive, and a 6-inch water in Finley Lane that will serve this area.	3



200 South Ivy Street - Room 177 Medford, Oregon 97501
Customer Service (541) 774-2430 • Administration (541) 774-2440
Fax (541) 774-2555 • wtrcom@ci.medford.or.us
www.medfordwater.org

December 5, 2014

Joe Slaughter, AICP
Planner IV, Long Range Planning
City of Medford
Lausmann Annex
200 S. Ivy Street
Medford, OR 97501

Subject: Revise scoring of the ESA's

Dear Joe,

Medford Water Commission (MWC) has received the additional layouts/master plans for ESA areas MD2 and MD7 that were routed to MWC for reevaluating these ESA areas. Initially, MWC was in favor of reevaluating the scoring for these areas, but after internal discussions MWC has decided not to adjust the previously submitted scores for the following reasons.

The current MWC scoring of the ESA areas is based on the following criteria:

- The score of 3 or "green" is based on water facilities directly adjacent to the Urban Reserve area.
- The score of 2 or "yellow" is based on water facilities being one lot/tier further away from the Urban Reserve area than what is listed as a score of 3.
- The score of 1 or "red" is based on water facilities being two lots/tiers further away from the Urban Reserve area than what is listed as a score of 1. Additionally a score of 1 is warranted if reservoirs, pump stations, and water transmission mains are lacking. If the Urban Reserve area is in a non-serviceable area a score of 1 is also assigned.

The recently submitted master plans did not change the existing condition to warrant a change of the existing MWC scoring. The recently submitted master plans are not linked to an approved land development application with approved conditions that bind the master plan to the Urban Reserve areas. If the master plans were submitted for a formal review and approval process, then the overlay of the master plan could potentially change the evaluation of the ESA areas in question.

MWC does agree with the concept of the master plans, and acknowledges that a demonstrated systematic/phased development of the ESA areas in question would enhance the development potential of the areas. However, the lack of a formal approval/adoption of the submitted master plans does not insure the implementation of those master plans. The

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Joe Slaughter, AICP
Planner IV, Long Range Planning
City of Medford
Subject: Revise scoring of the ESA's
December 5, 2014

Page 2 of 2

master plans could potentially change for a multitude of reasons, including market conditions, change of ownership, cost of development, environmental issues, etc.

In conclusion, MWC is reluctant to set the precedent of changing our existing ESA scoring based on submittals of non-binding exhibits. Should the criteria change for any given ESA, MWC would take that data under consideration.

Sincerely,



Eric C. Johnson, P.E.
Principal Engineer
Medford Water Commission

APPENDIX I. TRANSPORTATION MEMO

from PC Study Session, April 6, 2015, Exhibit D

SUBJECT UGB Amendment Project—Supplement to March 12, 2015 staff report
 Additional explanation of how staff translated transportation analyses into
 scoring maps

FILE NO. CP-14-114

TO Planning Commission

FROM Joe Slaughter, Planner IV, Comprehensive Planning

DATE April 6, 2015

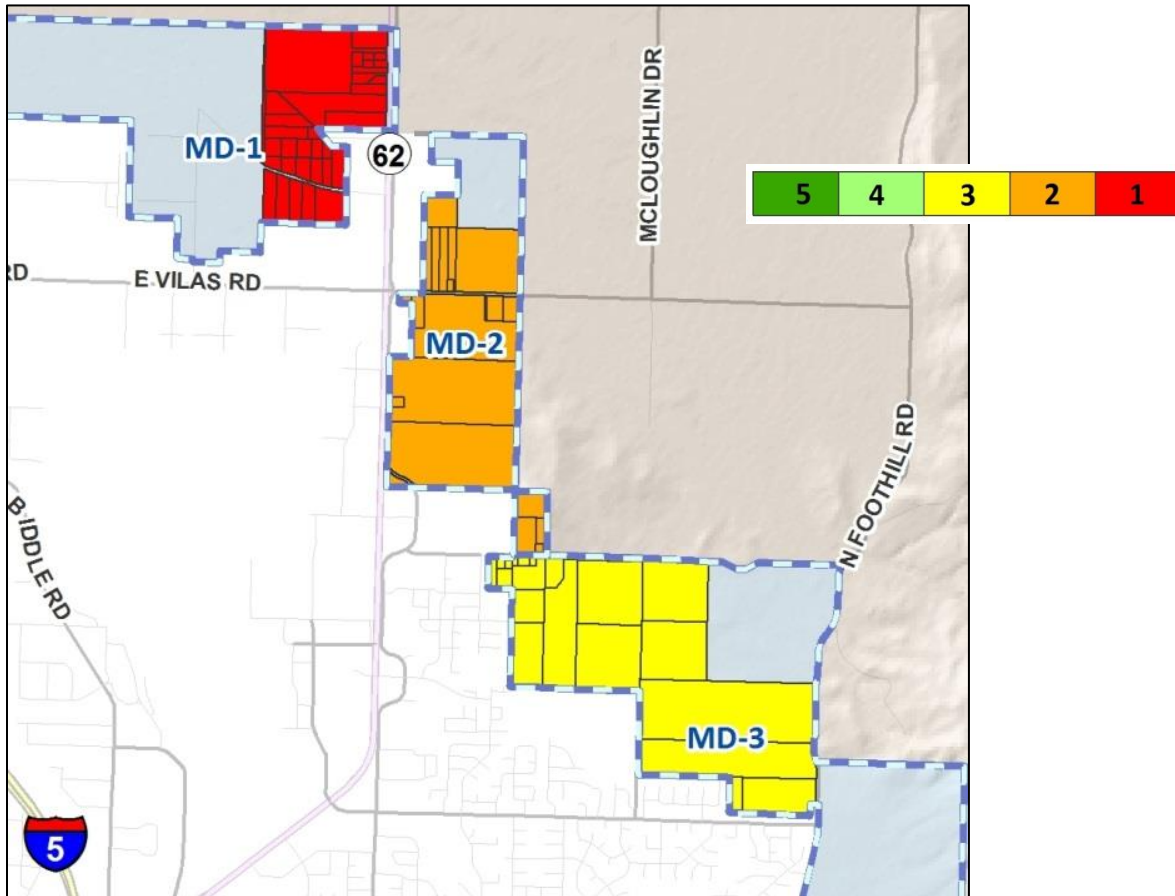
PROCESS

Staff asked the consultant, Kittelson and Associates, and ODOT's Transportation Planning Analysis Unit (TPAU) to model four different growth scenarios within the external study areas (ESAs). Maps of the four scenarios are on page 110 of the March 12 hearing packet; they are part of draft technical memorandum no. 8 (TM-8) from Kittelson. Note that the models incorporated both the South Stage Road I-5 overpass and the new Highway 62 route. However, although Owen Drive was included in the model as an east–west connection to Foothill Road, Springbrook Road was not included as a north–south connection to East Vilas Road.

The scenario evaluations on pages 111–117 have one common message: growth at the current level of service will require a lot of system upgrades no matter where it happens. Given that, a number of differences stand out from the evaluations:

- The east side lacks a dense grid of streets; with fewer interconnections there are fewer route choices, forcing traffic onto just a few streets.
- New north–south routes parallel to Highway 62 are needed in the northeast.
- A north–south collector route parallel to Foothill–North Phoenix Road would be advisable on the east side.
- The west side has a dense enough grid of streets to handle growth in vehicular traffic pretty well, but improvements to multi-modality are needed.

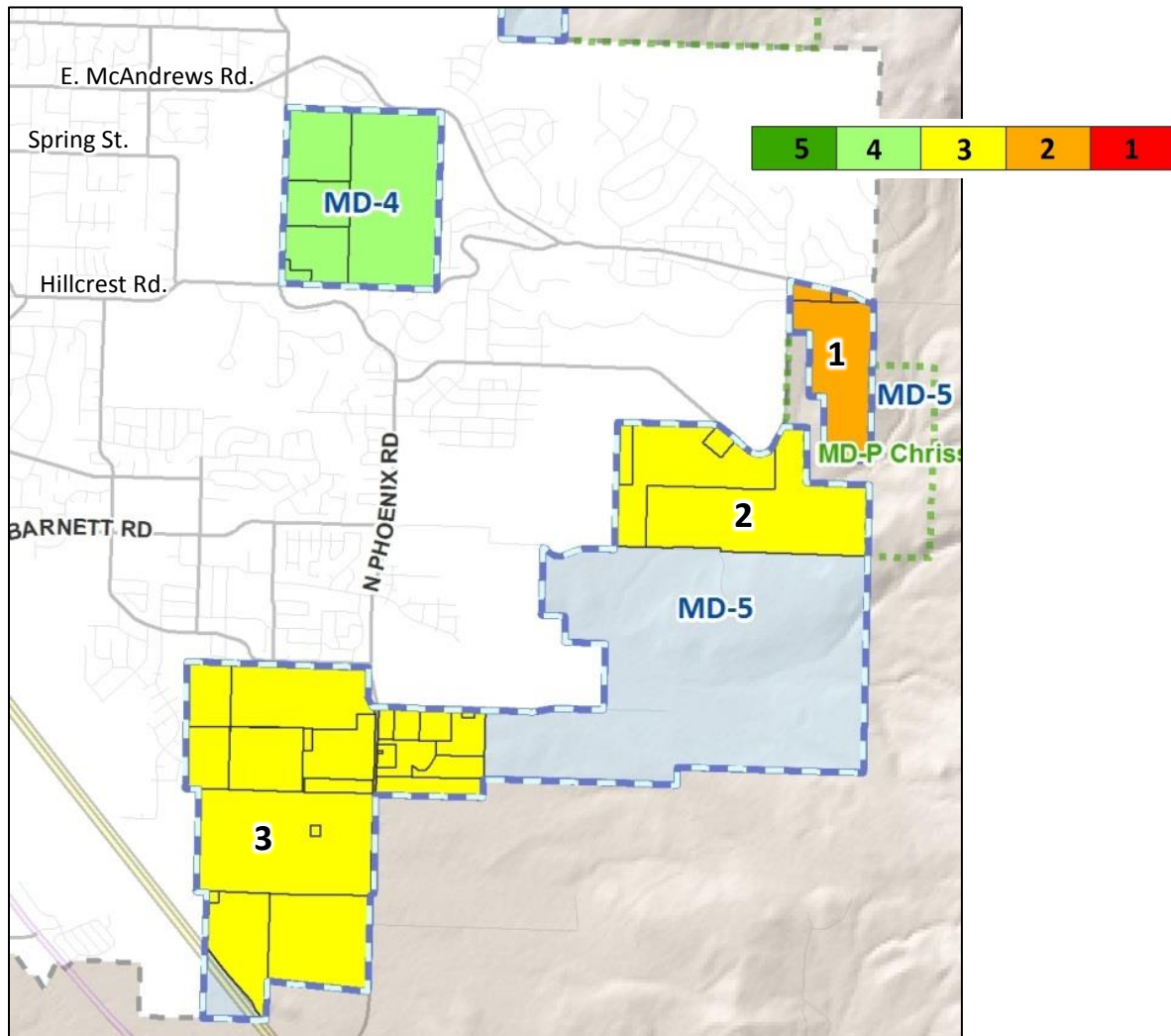
With the evaluations in hand, staff worked around the map and scored large blocks of the ESAs on a five-tiered scale. The process involved a lot of backing up and re-evaluating, a lot of looking at areas again and again in light of conclusions about other areas; in short, there were many iterations over a number of meetings. The next few sections summarize staff's thinking about various sectors.



NORTHEAST

The Highway 62 corridor is more sensitive to growth than some other facilities. Staff originally considered giving both MD-1 and MD-2 the lowest score, but MD-2 was bumped up slightly because a Springbrook Road extension to East Vilas Road would provide an alternative to Crater Lake Highway (Hwy. 62). The MD-3 area was given a moderate score because connections through it would relieve pressure on Delta Waters Road.

Staff continually wrestled with the inherent irony in these discussions: bringing in land to help alleviate a transportation problem also creates further demands on the transportation system. However, the urban reserve is exactly where the City decided it wanted to grow in the future, so staff concentrated on where extending the boundary would provide some capacity benefit, and not just put additional traffic on existing streets.



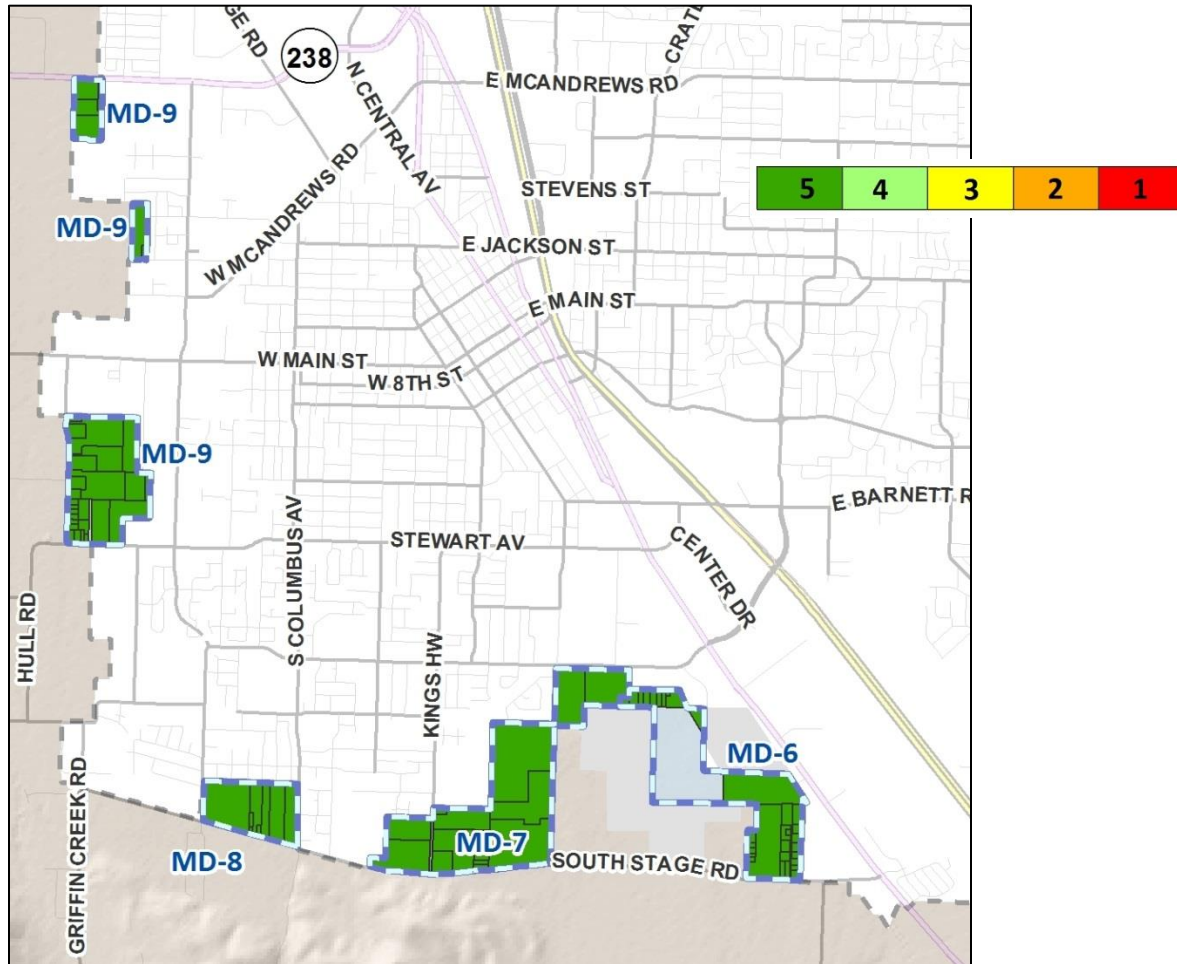
SOUTHEAST

Most of the areas in the southeast received low scores in the first go-around. It was obvious that North Phoenix Road will experience congestion no matter where development takes place in the urban reserve; it is an inevitable result of the growth that will occur in Medford and the surrounding communities as well. Note that the separate ESA parts of MD-5 are labeled 1–3 on the map for easier reference.

Staff reasoned that MD-4 (Hillcrest Orchards) would benefit from an extension of Spring Street eastward to join a collector coming north off Hillcrest Road through MD-4. Instead of just putting more traffic on East McAndrews Road and Hillcrest Road, it would provide an alternative route through its own development and the development of Dunbar Farm.

MD-5.1 would likely not be able to provide through-connections due to topography, hence the moderate-low score. MD-5.2 would include an extension of East Barnett Road that would bend northward to join Cherry Lane where it oxbows southward, so staff as-

signed it a moderate score. MD-5.3, comprising the Centennial golf course and the parcels south of it, also received a moderate score on the assumption that the South Stage overpass of the interstate highway would draw off pressure from North Phoenix Road and East Barnett Road.

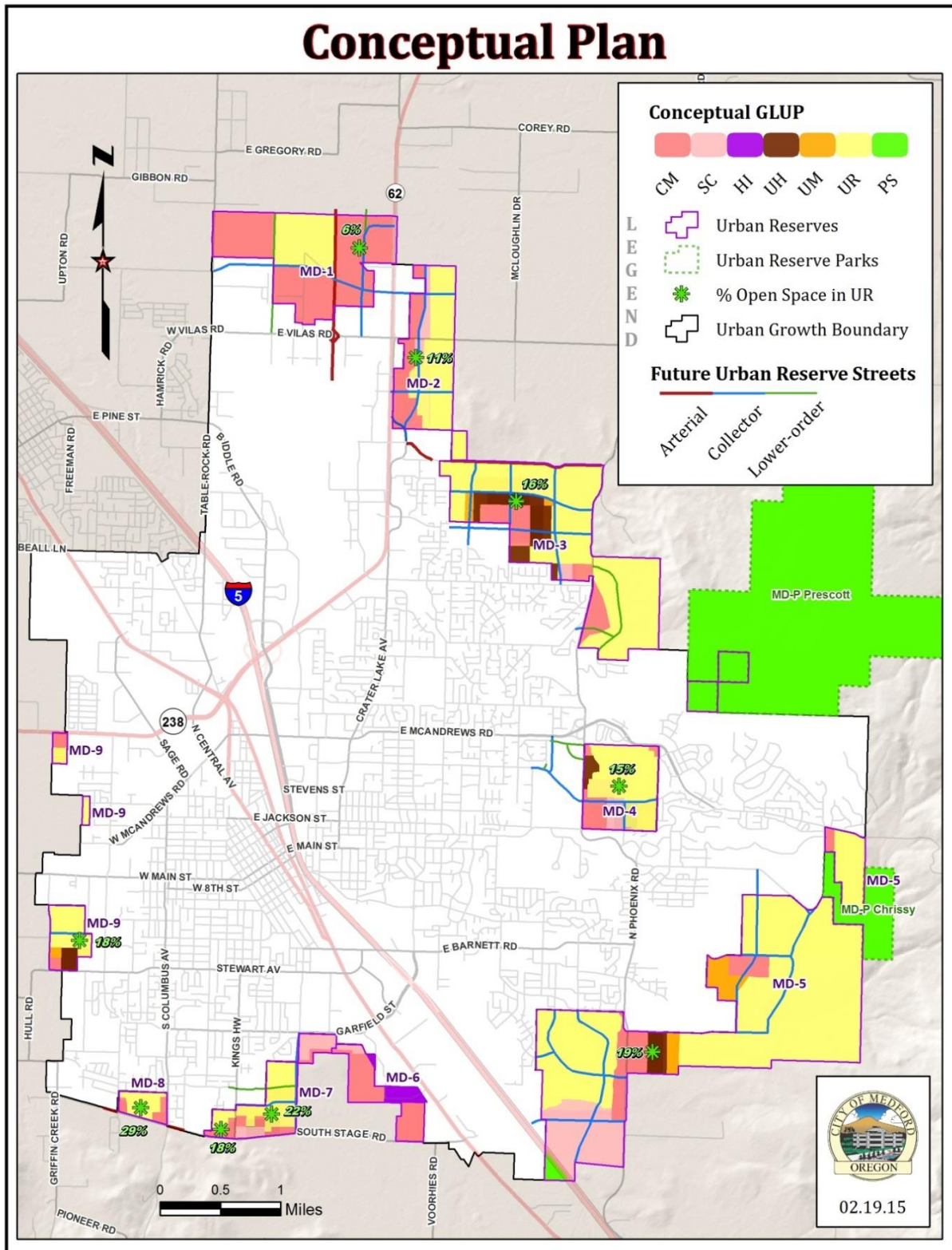


SOUTHWEST

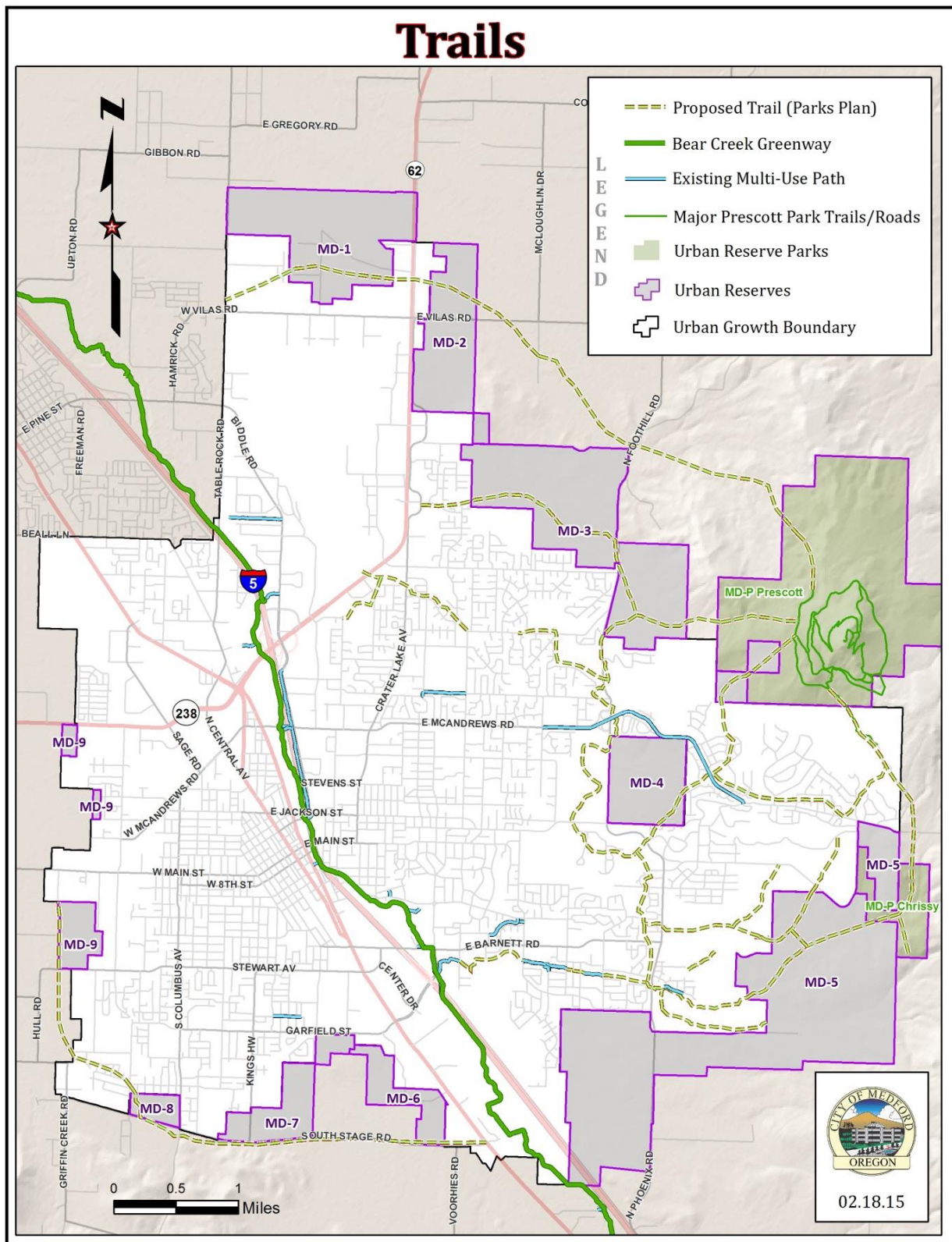
Except for the segment of South Columbus Avenue between West 10th Street and Stewart Avenue, all the higher-order streets in this quadrant proved to have sufficient capacity for motor vehicles in all the modeling scenarios. In addition, MD-7 would allow the extension of South Holly Street to South Stage Road. Giving all the areas in this quadrant a high transportation score was an obvious choice for staff.

APPENDIX J. CONCEPTUAL PLAN

Map 8.1. Conceptual Plan for Urban Reserve (Higher-order Streets and Land Use)



Map 8.2. UGB/Urban Reserve Trails Plan (adapted from Leisure Services Plan Figure 6.2)



APPENDIX K. LIST OF WRITTEN TESTIMONY RECEIVED DURING COUNCIL HEARINGS

<u>Exhibit</u>	<u>From</u>	<u>MD area/subarea</u>	<u>Received</u>
E	White	9 south	03-30-2015
F	Hamlin	9 south	04-06-2015
G	Knox, Christopher	9 south	04-06-2015
H	Carlton	1	04-17-2015
I	Jackson County	—	04-14-2015
J	Starlite Lane group	6	06-03-2015
K	Rogue Valley Sewer Service	—	07-14-2015
L	Rogue Valley Manor	5 sw	07-20-2015
M	Stevens	6	07-20-2015
N	Sjothun	—	07-06-2015
O	Matthews (ex parte)	—	multiple
P	Richard Steven and Associates	2	07-21-2015
Q	Matthews (ex parte)	—	07-22-2015
R	Hearn	5 mid	07-29-2015
S	Starlite Group	6	07-30-2015
T	Bartlett	5 ne	07-30-2015
U	Knox, Mark	7s and 8	07-30-2015
V	Mahar	5 ne	07-31-2015
W	Hansen	5 ne	07-31-2015
X	Vincent	5 ne	08-03-2015
Y	Carpenter	3 west	08-04-2015
Z	Harland	general	08-04-2015
AA	Broadway	6	08-04-2015
BB	Montero	5 sse	08-05-2015
CC	Savage	3 east	08-05-2015
DD	Desmond	7 north	08-05-2015
EE	Caldwell/Hight	general	08-05-2015
FF	Root	general	08-05-2015
GG	Stark	3 west	08-06-2015
HH	Cofield	3 west	08-06-2015
II	Kell	3	08-06-2015
JJ	Montero	general	at hearing 08-06-2015
KK	LaNier/Parducci	2	at hearing 08-06-2015
LL	Savage	general	at hearing 08-06-2015
MM	Savage	general	at hearing 08-06-2015

<u>Exhibit</u>	<u>From</u>	<u>MD area/subarea</u>	<u>Received</u>
NN	Woerner	4	<i>at hearing</i> 08-06-2015
OO	Woerner	4	<i>at hearing</i> 08-06-2015
PP	Mahar	5 ne	<i>at hearing</i> 08-06-2015
QQ	Jones	5 ne	<i>at hearing</i> 08-06-2015
RR	Stocker	5 sw	<i>at hearing</i> 08-06-2015
SS	Brooks	9 north	<i>at hearing</i> 08-06-2015
TT	Houghton	9 mid	08-11-2015
UU	Fischer	7	08-11-2015
VV	Hathaway	5 sw	<i>at hearing</i> 08-06-2015
WW	LeBombard/DLCD	general	08-13-2015
XX	Bennett	5 ne	08-13-2015
YY	Chamberland	5 ne	08-13-2015
ZZ	Desmond	5 ne	08-13-2015
AAA	Watson	5 ne	<i>at hearing</i> 08-13-2015
BBB	Mahar Jr.	5 ne	<i>at hearing</i> 08-13-2015
CCC	Lulich	5 ne	<i>at hearing</i> 08-13-2015
DDD	Lane	5 ne	<i>at hearing</i> 08-13-2015
EEE	Hall	5 ne	<i>at hearing</i> 08-13-2015
FFF	Jones	5 ne	<i>at hearing</i> 08-13-2015
GGG	Hansen	5 ne	<i>at hearing</i> 08-13-2015
HHH	Stone	5 ne	<i>at hearing</i> 08-13-2015
III	Hansen	5 ne	<i>at hearing</i> 08-13-2015
JJJ	Broadway	6	<i>at hearing</i> 08-13-2015
KKK	Ayala	7 & 8	<i>at hearing</i> 08-13-2015
LLL	Ayala	7 & 8	<i>at hearing</i> 08-13-2015
MMM	White	9	<i>at hearing</i> 08-13-2015
NNN	Dobson	9	<i>at hearing</i> 08-13-2015
OOO	Brooks	9	<i>at hearing</i> 08-13-2015
PPP	Hight	general	<i>at hearing</i> 08-13-2015
QQQ	Woerner	general	<i>at hearing</i> 08-13-2015
RRR	Brooks	5 ne	<i>at hearing</i> 08-13-2015
SSS	Freel	8	<i>at hearing</i> 08-13-2015
TTT	Caldwell	general	<i>at hearing</i> 08-13-2015
UUU	Hanson	5 ne	<i>at hearing</i> 08-13-2015
VVV	Hanson	5 ne	<i>at hearing</i> 08-13-2015
WWW	Schroeder	4	08-14-2015
XXX	Knox, Mark	7 & 8	<i>at hearing</i> 08-13-2015
YYY	Stevens	6	08-20-2015

<u>Exhibit</u>	<u>From</u>	<u>MD area/subarea</u>	<u>Received</u>
ZZZ	Holmes/1000 Friends	general	08-20-2015
AAAA	Morehouse/ODOT	general	08-20-2015
BBBB	Hansen	5 ne	at hearing 08-20-2015
CCCC	Hays	general	at hearing 08-20-2015
DDDD	Stocker	5 sw	at hearing 08-20-2015
EEEE	Bartholomew	2	at hearing 08-20-2015
FFFF	Harland	general	at hearing 08-20-2015
GGGG	Ayala	7 & 8	at hearing 08-20-2015
HHHH	Morehouse/ODOT	general	08-24-2015
IIII	Mahar	5 ne	08-27-2015
JJJJ	Broadway/Starlite	6	09-11-2015
KKKK	Hadrian	5 ne	09-11-2015
LLLL	Sjothun/Parks & Rec	general	09-14-2015
MMMM	LeBombard/DLCD	general	09-16-2015
OOOO	Maize	7 north	09-17-2015
PPPP	Pfeiffer	4	09-17-2015
QQQQ	Harris	7 & 8	09-26-2015
RRRR	Pfeiffer	4	10-01-2015
SSSS	Woerner	4	10-01-2015
TTTT	Hansen	5 ne	10-01-2015
UUUU	Hashimoto	4	10-14-2015
VVVV	Canon	3	10-14-2015
WWWW	Allan	4	10-14-2015
XXXX	Hansen	5 ne	10-14-2015
YYYY	Montero	general	10-14-2015
ZZZZ	Brooks	9	10-15-2015
AAAAA	Stevens	2 & 5	10-15-2015
BBBBB	Hathaway	5	10-15-2015
CCCCC	Pfeiffer	general	10-15-2015
DDDDD	Montero	general	10-15-2015
EEEEE	Kell	3	10-19-2015
FFFFF	Mahar	5 ne	10-21-2015
GGGGG	Ayala et al	7	11-03-2015
HHHHH	Hearn	5 mid	11-05-2015
IIIII	Honecker Cowling	2	11-11-2015
JJJJJ	Pfeiffer	general	11-17-2015
KKKKK	Stark & Hammack	3	11-18-2015

<u>Exhibit</u>	<u>From</u>	<u>MD area/subarea</u>	<u>Received</u>
LLLLL	Pfeiffer	general	12-02-2015
MMMMM	Kupillas (Manor)	5 sw	12-16-2015
NNNNN	Hornecker Cowling	2	12-17-2015
OOOOO	Stark-Hammack	3	12-17-2015
PPPPP	Pfeiffer	4	12-17-2015
QQQQQ	CSA: "grand bargain"	general	01-21-2016
RRRRR	CSA: Hansen	5 ne	02-05-2016
SSSSS	Carpenter	3	02-08-2016
TTTTT	LeBombard/DLCD	general	02-10-2016
UUUUU	PRI (LDS church)	3	02-17-2016
VVVVV	Holmes/1000 Friends	general	02-22-2016
WWWWW	Pfeiffer	general	02-24-2016
XXXXX	Pfeiffer	general	02-25-2016
YYYYY	Luther	general	05-16-2016

APPENDIX L. EXCERPTED MINUTES OF COUNCIL MEETINGS

City Council Study Session Minutes July 23, 2015

The Medford City Council Study Session was called to order at 12:00 p.m. in the Medford Room of the Medford City Hall on the above date with the following members and staff present:

Mayor Gary Wheeler; Councilmembers Daniel Bunn, Chris Corcoran, Dick Gordon, Tim Jackle*, Eli Matthews, Kevin Stine*, Michael Zarosinski

City Manager Pro Tem Bill Hoke; City Attorney Lori Cooper; Interim City Recorder Karen Spoons; Planning Director Jim Huber; Assistant Planning Director Bianca Petrou; Principal Planner Kelly Akin; Planner IV Joe Slaughter; Senior Planner John Adam; Public Works Director Cory Crebbin

Councilmember Clay Bearnson was absent.

*Arrived/left as noted.

Urban Growth Boundary (UGB) Update

Mayor Wheeler turned the meeting over to Councilmember Bunn; Councilmember Bunn noted that Council thought there would be many people who would want to speak; therefore there will be a draft letter of the expected schedule. A special meeting will be held on August 13 with three additional Council meetings held weekly. Many arguments may be received and staff suggested a summary in advance, which will be circulated to Council before the meeting. Staff would prepare responses to the comments. Planning staff will circulate an address list of those in the UGB and if Council had a conflict on a particular tax lot they could state that. Councilmember Jackle did not think that was correct. Councilmember Bunn noted that they will get advice from Legal.

Councilmember Corcoran will be present but will have to recuse himself because of those they work with at the bank. Mayor Wheeler noted they will take comments in order numerically so the format can be reasonably orderly.

John Adam began the presentation (see handout) and stated that the RPS process built a lot of trust with other cities. In Phase 1 of this project, Medford analyzed 800 acres internally for intensification; and it was reduced to 550 acres; Council shaved off 50 acres and approved in one meeting. Commission report details effects of Phase 1. Joe Slaughter covered the criteria pertaining to Goal 14. The City of Medford has demonstrated a need for additional land to meet its 20-year supply in its Comprehensive Plan. Councilmember Gordon questioned the Population Element being approved in

2007 and doubted Medford met the population elements. If we use that it would be appealable whereas if we based it on the new standards from Portland State it would not be appealable. Joe Slaughter stated that we have an agreement with DLCD and we need to keep with the process so those numbers are safe. Councilmember Gordon thought it was still appealable. Jim Huber noted that anything is appealable well beyond population. Everything is based off those population figures and everything would have to change because of that. While the numbers are different it would have a significant impact to change, such as Housing Element, Buildable Land Inventory, etc. It would add a few years before we could complete this process. Mayor Wheeler noted that it is a moving target.

*Councilmember Stine arrived.

County roads were discussed; Cory Crebbin noted we don't take over county roads unless they are up to a certain standard. Councilmember Gordon questioned taking a road over in the condition they are at the time of annexation; Cory Crebbin noted that is correct but the County has agreed to keep them up to a certain standard. Councilmember Corcoran questioned Table Rock Road, Cory Crebbin was unsure. Councilmember Gordon noted we would be left with less than desirable streets. John Adam noted that for the modeling, staff populated the land with housing and employees. The modeling showed us deficiencies but not the cost. Cory Crebbin stated this isn't the final word as we still need to amend the Transportation System Plan. Councilmember Gordon talked about adjusting the System Development Charges to the project list. Councilmember Zarosinski questioned new arterial streets; Cory Crebbin noted that we did do a transportation model to determine that. The score on the map determines the amount of work needed.

*Councilmember Jackle left.

Joe Slaughter resumed his presentation. Three alternatives had been presented to the Planning Commission for the proposed UGB amendment. Planning Commission chose Amendment 1 and removed most of alternative 3 but wanted to retain a small place of MD-3 by Delta Waters. Another portion south of Cherry Lane was included. He noted a post-Planning Commission correction that had to be made in MD-5 by Coal Mine Road was one legal parcel; the original boundary split them outside of the UGB, therefore the boundary was fixed to include in the UGB. Staff noted the split was from a function of the assessors map.

Councilmember Gordon questioned if the Planning Commission took into account the extensions of Owen Drive and others; staff noted that they did take into account Owen and that was more important than north/south connections. Connectivity of roads were discussed in areas where that is an issue. Mayor Wheeler noted that Council did look at boundaries between Phoenix pertaining to an overpass. Councilmember Gordon noted that twenty years is a long time. Mayor Wheeler noted that it is not from a lack of look-

ing at it. Harry and David was looked at pertaining to a South Valley Employment area but nothing came to fruition.

Councilmember Stine questioned if we can ask questions on how it will be developed; Attorney Lori Cooper noted it is not a criteria that you can ask. Councilmember Bunn noted that you can't hold people to what they would say. Joe Slaughter noted that is a good question and talked about the Centennial Golf Course who would need an open space assessment before they could annex and that will be in the Comprehensive Plan. Mayor Wheeler noted that we will receive many comments but staff will help us through it. Bianca Petrou compiled everything and would like to send the staff report out tomorrow. Anything new will continue to come before Council. As part of this study session a thorough explanation was given. The night of the hearing will be an abbreviated staff report to give time for the public to speak. Bianca Petrou stated that Council could call and ask questions. Several people have asked to testify and it will still be 3-5 minutes. Mayor Wheeler requested a binder with tabs; Council agreed.

Mayor Wheeler noted that we may not have to take testimony; Councilmember Stine requested the letter Councilmember Bunn spoke state that the meeting will take place in the evening.

The meeting adjourned at 1:05 p.m.

**City Council Minutes
September 17, 2015**

120. Public hearings

120.1 CONTINUED. Consideration of a proposed Comprehensive Plan/Urban Growth Boundary Amendment affecting the General Land Use Plan (GLUP) map, the Medford Street Functional Classification Plan of the Transportation Element, and portions of the text of both the Urbanization and GLUP Elements.

Councilmembers Bunn and Corcoran recused and left the dais.

Principal Planner John Adam presented the staff report.

City Attorney Cooper stepped out at 9:16 p.m. and returned at 9:18 p.m.

Councilmember Zarosinski questioned the Manor property, the “Active Adult Retirement Community” (AARC), and the GLUP determination. Mr. Adam stated AARC does not appear in the Housing Element. The Manor can satisfy housing needs with various densities and meet the required 6.6 units per acre on average. Councilmember Jackle asked about the tax break for the Manor (i.e., the open space assessment) and wanted assurances.

Councilmember Gordon questioned how the procedure would go tonight. Mayor Wheeler stated he thought they would go through the MDs one by one. Councilmember Jackle said he has no concerns about the west side properties – MD-6, 7, 8, 9 and wanted to know if anyone else had concerns. Councilmember Gordon questioned the Starlite/Myers Lane area as a homeowners requested MD-6 Starlite Lane be excluded from the inclusion. Mr. Adam stated that leaving them out would create a small enclave.

Councilmember Gordon questioned if we brought in MD-5 would it over-capacitate our sewer systems. Public Works Director Crebbin stated they are doing a master study with the anticipation of the additional land.

Councilmember Jackle wanted to know what the opinion of the 1000 Friends was from Mr. Adam’s conversation with him.

Councilmember Stine wanted to know how they determined to eliminate portions of MD-4. Mr. Adam stated Planning Commission wanted alternatives on how to remove 175 acres. The location of a possible Spring Street extension was part of the decision as well as the already existing commercial operations.

Pertaining to the Manor, Mr. Adam corrected his earlier statement about AARC: it is mentioned in the Housing Element, but is not a designated housing type.

Councilmember Gordon wanted assurances that we are expanding in an area that we can safely take care of our citizens. Fire Deputy Chief Bates stated they can put something together for Council on response times in these areas. He further stated that they are actively working with citizens about these plans currently and that the Fire Department is confident that we can protect them.

City Manager Pro Tem Hoke requested questions ahead of time so staff can provide the answers in advance. We can add additional meetings if needed; we want to make progress, but are not on a clock with a specific deadline. Councilmember Jackle suggested submitting the suggestions in writing and post to the project website. Another option is to submit the questions in writing, and then review the questions again in a public meeting. Dates were suggested; Mr. Adam suggested providing a progress report on October 1 and continue the discussion to the evening of October 15 to allow for the deadline.

**City Council Minutes
October 1, 2015**

Mayor Gary Wheeler; Councilmembers Clay Bearnson, Daniel Bunn, Chris Corcoran, Dick Gordon, Tim Jackle, Kevin Stine, Michael Zarosinski

City Manager Pro Tem Bill Hoke; Deputy City Attorney Kevin McConnell, City Recorder Karen Spoons

Councilmember Eli Matthews was absent.

120. Public hearings

Mayor Wheeler noted City Council received more than 1,000 pages of exhibits to date and a study session may be scheduled.

120.1 CONTINUED. Consideration of a proposed Comprehensive Plan/Urban Growth Boundary (UGB) Amendment affecting the General Land Use Plan (GLUP) map, the Medford Street Functional Classification Plan of the Transportation Element, and portions of the text of both the Urbanization and GLUP Elements.

Councilmembers Bunn and Corcoran recused themselves.

Principal Planner John Adam advised that Planning Department staff recommended a revision adding 43 acres to the UGB, because of unusable lands. This addition would contain 19 acres of low density residential, 11 acres of high density residential, 8 acres of commercial and 6 acres of office commercial.

Mr. Adam spoke of two letters from ODOT, noting the concept plan was approved by the Metropolitan Planning Organization's Policy Committee and that staff requested additional information from ODOT before responding. A draft Functional Transportation Amendment map is being prepared, outlining the collector and arterial streets. It will not be finalized until the UGB's boundary is determined and will be an extension of the Transportation System Plan (TSP). Public Works Director Cory Crebbin noted the map is conceptual, but will provide a general outline. When the TSP is updated, it will be submitted to the Council and will be part of the Comprehensive Plan.

Fire Chief Fish explained the evacuation plan for the east Medford hillside. The plan included two evacuation routes, new posted signage, new building codes, and forms of notification. The Fire Department will rely on Medford Police and other enforcement to help with evacuations. Notification is the key to getting people out.

Mr. Adam discussed the process for meeting the 6.6 units per acre density commitment, the Starlite/Myers Lane area's request for exclusion from annexation, and the City's industrial land calculation.

Councilmember Gordon requested the Planning Commission take a look at PUDs.

Mayor Wheeler discussed a letter from Perkins Coie stating the City could have a binding commitment. Mr. McConnell recommended a review of the conceptual land use method used by other cities, their success and deed restriction examples.

A study session has been tentatively scheduled for October 22 at 6:00 p.m.

Councilmembers Bunn and Corcoran rejoined Council.

**City Council Minutes
October 15, 2015**

120.1 CONTINUED. Consideration of a proposed Comprehensive Plan/Urban Growth Boundary Amendment affecting the General Land Use Plan (GLUP) map, the Medford Street Functional Classification Plan of the Transportation Element, and portions of the text of both the Urbanization and GLUP Elements.

Councilmember Bunn recused himself and left the dais.

Assistant Planning Director Bianca Petrou presented the staff report and stated that 43 buildable acres were added to the urban growth area. She presented four options which were based on scoring and what homeowners requested. Councilmember Gordon questioned deed restrictions and asked how the City could ensure property owners would use the land as specified. Ms. Petrou stated that the upcoming study session will address that issue and requested direction for staff. Council questioned various areas that would like to be added to the urban growth boundary.

Motion: Extend meeting to 10:20 p.m.

Moved by: Kevin Stine

Seconded by: Clay Bearnson

Roll call: Councilmembers Bearnson, Gordon, Jackle, Matthews, Stine, and Zarosinski voting yes.

Motion carried and so ordered.

Ms. Petrou questioned if Council preferred a particular option presented. Affordable housing was discussed and whether or not the City could/should designate specific building options for population density, multiple use, etc.

Councilmember Bunn joined Council at the dais.

**City Council Study Session Minutes
October 22, 2015**

The Medford City Council Study Session was called to order at 12:00 p.m. in the Medford Room of the Medford City Hall on the above date with the following members and staff present:

Mayor Gary Wheeler; Councilmembers Clay Bearson, Daniel Bunn, Chris Corcoran, Dick Gordon, Tim Jackle, Eli Matthews, Kevin Stine, Michael Zarosinski

City Manager Pro Tem Bill Hoke; City Attorney Lori Cooper; City Recorder Karen Spoons; Finance Director Alison Chan; Assistant Planning Director Bianca Petrou; Principal Planner John Adam; Parks and Recreation Director Brian Sjothun; Public Works Director Cory Crebbin

* * *

Urban Growth Boundary Amendment

Assistant Planning Director Bianca Petrou briefed Council on the process to date; the next meeting will be at the November 12 Council Meeting. Principal Planner John Adam stated some promises would be a natural issue as development occurs. As land is developed the developer would have SDC fees returned. Density is a requirement that is a regional plan. Specific concerns were addressed, such as donations of a school site, fire station, and a Charter school and staff questioned how necessary are these to Council? Staff would need a 100% buy-in and if not received, do we leave that property owner out even though it might cause an enclave? There is an alternative to having agreements, such as a premium on the SDCs. Timing wise, staff would like to get this out the door to the County. If we are negotiating with owners this would delay that process.

MD-1 No promises were made.

MD-2 A school within five years. Council wanted it to continue for about 20 years and the other party is looking into that.

MD-3 Nothing specific

MD-5 Trails; a letter was received for the land and development pertaining to this. Manor Their attorney was willing to agree to an "over 55 retirement community" agreement.

MD-7 Fire station and Charter school; no specific agreement at present.

Councilmember Zarosinski commented on parks, trails, and payment by SDCs, and noted that MD-5 is a different assurance as it is more specific. Ms. Petrou provided a sample of a general agreement. Parks and Recreation Director Brian Sjothun provided information on SDCs. The issue Parks is coming up with is that the SDC rate is not enough to build the park, therefore land is donated. The foundation develops the park with the developer. Infrastructure requirements, such as streets, take up much of the money in the

SDC fund. He talked about 2,600 acres of park land with not enough staff to maintain it and that we need a system that considers all portions of the park needs, including maintenance. We can't build more parks. Councilmember Jackle stated that there are issues when land is not developed per code. Mr. Sjothun noted the first option presented with the recent letter from Mahar is the best option. SDC rates will be talked about later and issues like this could be considered.

Councilmember Gordon thought we need individual agreements and connectivity of land already in the UGB part of each agreement. He also stated that we need to obtain the easements of the lands as a condition before coming into the UGB and to look at the road situation. We may want to put Owen Drive in before other land develops, including South Stage. Barnett extension to Cherry Land needs to be a minor arterial. City Attorney Lori Cooper expressed concern with this. Councilmember Gordon wanted assurance that the connectivity takes place. Public Works Director Cory Crebbin provided information on the functions that must take place when development comes in. Ordinances are in to state we need square intersections, etc. Councilmember Jackle did not think we would get there as that would be done at the zone change. Ms. Petrou noted you will also develop the Functional Development Map. Mr. Adam noted level of service will play a factor as development occurs. Discussed were the agreements and the timeline to get the UGB to the County. Councilmember Zarosinski questioned if MD-4 would pursue developing; Ms. Petrou stated that you can't force someone to develop. Mayor Wheeler questioned how we can hold the developers to the concept that we saw. Mr. Adam stated that it depends on the degree of the pictures that Council saw. Mr. Adam noted that you would adopt the Urbanization Plan, which will be shy of the Southeast Plan. Ms. Cooper talked about what the attorney said pertaining to a specific development, such as the Southeast Master Plan. Staff noted that open space does not need to be owned by the city but can be a part of the homeowners association.

Councilmember Stine questioned the 43 additional acres; Councilmember Gordon thought it would determine on the agreements that fall into line. He was not opposed to come in with less than 43 acres. Staff presented the options for the additional 43 acres and recommended adding Option 3. Councilmember Gordon would like to take out Starlite Drive. Mayor Wheeler stated he would eliminate Option 2 but liked Option 3. Council will email their ideas to Planning. Staff discussed the areas where Council would like to have land added, such as the Hansen property, and staff would then need to take out other parcels.

The meeting adjourned at 1:24 p.m.

**City Council Minutes
November 12, 2015**

70. Public Hearing

70.1 CONTINUED. Consideration of a proposed Comprehensive Plan/Urban Growth Boundary Amendment affecting the General Land Use Plan map, the Medford Street Functional Classification Plan of the Transportation Element, and portions of the text of both the Urbanization and GLUP Elements.

Mayor Wheeler stated that we received another exhibit and would like to close the record; Mr. McConnell noted that he is familiar with this case and if Council would like to close the record, it can do so. Councilmember Jackle stated that he is aware of an upcoming meeting and would like to hold that meeting and the citizens to be allowed to respond.

* Councilmembers Corcoran and Bunn recused themselves and left the dais.

* Councilmember Corcoran left the meeting.

Principal Planner John Adam presented information on the UGB amendment the updated agreements for MD-2 regarding a school site donation to make the agreements valid for 10 or 20 years, MD-5 East regarding using City land for a trail; MD-5 West regarding the Manor property, an update should be provided next week, MD-7.

Councilmember Gordon questioned the parkland for MD-2 and noted that the property should be a donation and any park should meet City design standards as well as the property described in Exhibit FFFFF.

Mr. Adam explained the four options for the distribution of 43 acres and requested Council's direction. Councilmember Gordon suggested we wait and there were no objections to waiting.

Councilmember Bunn returned to the dais.

**City Council Minutes
November 19, 2015**

120. Public Hearings

120.1 CONTINUED. Consideration of a proposed Comprehensive Plan/Urban Growth Boundary Amendment affecting the General Land Use Plan (GLUP) map, the Medford Street Functional Classification Plan of the Transportation Element, and portions of the text of both the Urbanization and GLUP Elements. (CP-14-114)

*Councilmembers Bunn and Corcoran recused themselves and left the dais.

John Adam, Principal Planner, spoke of the continuing work with the property owners to secure their promises regarding development. A meeting is scheduled for November 30 with the property owners on the east side.

Councilmember Jackle questioned the Starlite property; Mr. Adam noted the expansion proposal zoned that area commercial, not residential. Councilmember Jackle questioned the pear orchard property belonging to the Church of Latter Day Saints; Mr. Adam responded it is zoned one-third commercial and two-thirds residential. Councilmember Zarosinski thought we should be able to make a decision on December 3, no matter what happened November 30.

**City Council Minutes
December 3, 2015**

120. Public Hearings

Principal Planner John Adam noted that the hearing was closed, but the City is still accepting written comments.

120.1 CONTINUED. Consideration of a proposed Comprehensive Plan/Urban Growth Boundary Amendment affecting the General Land Use Plan (GLUP) map, the Medford Street Functional Classification Plan of the Transportation Element, and portions of the text of both the Urbanization and GLUP Elements.

Mr. Adam noted there was a meeting this week with property owners on the east side. There were no results during that meeting, although they are still discussing amongst themselves. Mr. Adam noted some agreements have been received, including a verbal agreement from the Manor. Mr. Adam questioned if Council has received everything requested. Councilmember Zarosinski questioned the concession for MD7; Mr. Adam noted it was regarding the donation of land for a private school and a fire station. Councilmember Gordon believed he received the information he wanted and stated he preferred a 99-year agreement over perpetuity regarding the Manor property (Centennial Golf Course). Councilmember Jackle explained that perpetuity is standard, with applicants and/or the City extinguishing the contract at a later date.

Councilmember Gordon noted that he personally believes that the City is considering adding too many acres to the UGB, because of population forecasts and we haven't met the targets. However, the City should include the maximum number of acres. He read excerpts from an article from the League of Oregon City's November 20th email regarding potential revisions to the Land Conservation and Development Commission (LCDC) regulations, which were part of the 2013 legislation and intended to address the results of various court cases. He noted the rules propose a study area as well as a modification of the land priority system by requiring cities to select lands that are least productive for resource-based industry and add those lands to the UGB first. The new rules are online.

Mr. Adam noted LCDC is meeting here January 13 and 14, 2016, but the rules will be discussed during the December meeting. Councilmember Jackle did not believe the new rules would apply to us, because our area is the only region that adopted regional problem solving and areas without regional problem solving would need to go through an exceptions land process. Councilmember Gordon clarified that the point system is not working throughout the state and the LCDC is considering revisions.

Motion: Continue the public hearing to December 17 at 7:00 p.m.

Moved by: Dick Gordon

Seconded by: Clay Bearnson

Roll call: Councilmembers Bearnson, Gordon, Jackle, Matthews, Stine, and Zarosinski voting yes. Councilmembers Bunn and Corcoran abstained.

Motion carried and so ordered.

**City Council Minutes
December 17, 2015**

The regular evening session of the Medford City Council was called to order at 7:05 p.m. in the Council Chambers of the Medford City Hall on the above date with the following members and staff present:

Mayor Gary Wheeler; Councilmembers Clay Bearnson, Daniel Bunn, Chris Corcoran, Dick Gordon, Tim Jackle, Eli Matthews, Kevin Stine, Michael Zarosinski

City Manager Pro Tem Bill Hoke; City Attorney Lori Cooper; City Recorder Karen Spoons

120. Public Hearings

120.3 CONTINUED. Consideration of a proposed Comprehensive Plan/Urban Growth Boundary Amendment affecting the General Land Use Plan (GLUP) map, the Medford Street Functional Classification Plan of the Transportation Element, and portions of the text of both the Urbanization and GLUP Elements.

Mayor Wheeler stated that he would like direction from Council on closing the record. Councilmembers Bunn and Corcoran recused themselves from Agenda Item 120.3. Principal Planner John Adam presented the staff report, outlined the process for the UGB amendment approval and presented the options for the possible additional acreage. Councilmember Zarosinski asked for information regarding the addition of the 153 acres; City Attorney Lori Cooper explained that in 2010 Council approved a new Housing Element as an amendment to the Comprehensive Plan. The LCDC did not accept it and returned it to the City. Mr. Pfeiffer, attorney for Hillcrest Orchards, argued that the City should consider the Element accepted; staff had recommended removing the 153 acres. Councilmember Zarosinski asked whether the City should bring the 153 acres back; Mr. Adam responded that it would come down to reversing the position the City took in response to arguments from 1000 Friends. Councilmember Jackle clarified there is a dispute regarding the zoning of the 153 acres; Mr. Adam noted the acreage would be zoned residential. Councilmember Bearnson noted he recently spoke with a developer who reported there was a lack of higher density areas to build affordable housing and questioned if there was a way to address the housing crisis. Mr. Adam pointed out that several acres in the existing UGB were re-designated at higher densities in December 2014; that leaves it up to property owners to change the zoning of their property.

Councilmember Gordon questioned whether the long-range plan included a school in MD-2; Mr. Adam said there is a school planned and it will be brought forward after the UGB approval. Councilmember Gordon questioned if a fire station was in the long-range plan for MD-7. Fire Chief Brian Fish stated there are no plans to build on the donated land at this time. Councilmember Gordon would like an answer from staff on what should be done with the property if no fire station is built. Councilmember Gordon also questioned whether the Hansen property could meet the density standards and re-

requested staff input. Mr. Adam responded he wasn't sure, but it would likely be difficult due to the topography. Councilmember Gordon and Mr. Adam discussed the density requirements and various areas which may not meet the criteria. Councilmember Gordon asked why the City couldn't add enough acres to ensure all interested people were added. Mr. Adam stated the County and the LCDC would require justification for adding that much land. Councilmember Jackle asked for clarification regarding the LCDC decision, he would like to add the 150 acres, and he supports keeping the record open.

Councilmember Gordon requested Council action regarding street designation and asked Mr. Adam about pending streets in the UGB. Mr. Adam responded the streets in blue are part of the proposed UGB amendment. Councilmember Gordon would like Barnett Road extended to Cherry Lane and Cherry Lane to Hillcrest. He also recommended changes to Owen Drive and Foothill Road.

Mayor Wheeler summarized the discussion and preferred excluding areas which do not wish to be included in the UGB. He also expressed concern with the addition of some of the Hillcrest property.

After discussion, Council decided a study session will be held February 25, 2016 to discuss the UGB amendment.

Mr. Crebbin responded to Councilmember Gordon's concerns regarding street designations, noting the TSP is a component of the Comprehensive Plan and determines street classifications. The UGB expansion proposal only shows the street connections and not the classifications. Councilmember Gordon asked how the streets could be classified as Council wished. Mr. Crebbin responded that Oregon Land Use law outlines the process for the Public Works staff to follow in order to change designations in the TSP.

Councilmember Stine questioned how residential land densities in the County are determined. Mr. Adam responded most of the properties are allowed to have one house; and therefore most of the property in the County is not developable until it comes into the City. Councilmember Stine questioned if the homeowner can choose the density for their property when it comes into the UGB. Mr. Adam stated they cannot choose unilaterally, but they do have input. Most of the determinations will be made during the urbanization plan.

Mr. Adam questioned if Council can close the record and open it to accept something from the DLCD; Ms. Cooper noted that could work. Councilmember Jackle noted that he has read some cases where the record has closed and there are issues what is and is not in the record. Council agreed to table this topic until the February study session.

**City Council Study Session Minutes
February 25, 2016**

The Medford City Council Study Session was called to order at 12:00 p.m. in the Medford Room of the Medford City Hall on the above date with the following members and staff present:

Mayor Gary Wheeler; Councilmembers Clay Bearnson, Chris Corcoran, Dick Gordon, Tim Jackle, Eli Matthews, Kevin Stine, Michael Zarosinski

City Manager Pro Tem Bill Hoke; City Attorney Lori Cooper; Deputy City Recorder Winnie Shepard

Councilmember Daniel Bunn was absent.

Principal Planner John Adam provided a history of the Urban Growth Boundary (UGB) expansion. During the December 19, 2015 Council meeting, staff was directed to revise the proposal; most of Council's recommendations were used to create three options:

1. Add to MD-4 and completely incorporate the Hillcrest Orchard property.
2. Restore the LDS-owned property in MD-3 and fill in the notch in MD-5. Although Council had directed to remove property from the LDS, there is enough acreage to restore that area and the jagged notch in MD-5.
3. Add the extra acres to MD-3 as well as the Skinner/Carpenter property.

Discussion of Revisions:

1. The "awkward hole" in the Chrissy Park area (Hansen Property) was not considered in the revision. Because there are no streets or trails connecting through that property, the gap is not "awkward" in the sense of being necessary.
2. Restoring the LDS Property provides a continuous right-of-way on North Foothill Road. Also, it could provide an access for an arterial street or collector in the future.
3. Option 1 will make the Hillcrest Orchard completely whole and would also include the furthest west portion of MD-3.
4. All restored properties came from residential, with a little from the Starlite area.
5. When referring to the number of acres, there are 63 gross and 40 net.
6. Options 1 and 3 omit the Starlite Lane and the Meyers Lane properties, but not the LDS property.

Staff could bring the options for Council's consideration during the March 17, 2016 Council meeting.

CSA Submission:

1. Council requested a revised presentation of the CSA information in a format similar to Planning's map to be considered as a fourth option.

- Mr. Adam noted CSA's option did not have the land need numbers exactly right, but staff could revise them if the Council chose that option.

Questions Brought Forward by Councilmember Gordon

1. Councilmember Gordon noted his concerns regarding the street functionality map and questioned whether the revisions prevented the development of Owen Drive through to Foothill Road; Mr. Adam replied that a future Owen Drive was not affected by the revisions.
2. Councilmember Gordon recommended an extension of Cherry Lane to Barnett Road which could serve as an arterial from North Phoenix Road to Hillcrest Road. He asked for clarification that none of the options compromised that ability; Mr. Adam confirmed that land wasn't touched.
3. Should Council's motion include language that Cherry Lane will be an arterial street? Public Works Director Cory Crebbin noted the classification of roads as major or minor arterials is included in the Transportation System Plan (TSP). The UGB expansion process only identifies the higher-order street corridors. Councilmember Gordon recommended the classification of Cherry Lane as an arterial, noting the lack of arterials in Medford.
4. It appears that Spring Street will be a major street for access across Hillcrest Orchards and Dunbar Farms. Because Spring Street is already compromised as it approaches Crater Lake Avenue, Councilmember Gordon requested a review of the street. Mr. Crebbin explained the TSP determines the capacity needed; if Spring Street will serve as an arterial, modification would be required.

Mr. Adam noted that Planning Staff will be prepared for the March 17 meeting and reformat CSA's map as a fourth option for Council's consideration.

Councilmember Gordon requested the map on the fourth option as soon as possible.

The meeting adjourned at 12:45 p.m.

**City Council Minutes
March 17, 2016**

The regular evening session of the Medford City Council was called to order at 7:20 p.m. in Medford City Hall Council Chambers on the above date with the following members and staff present:

Mayor Gary Wheeler; Councilmembers Clay Bearnson (left at 7:29), Daniel Bunn, Chris Corcoran, Dick Gordon, Tim Jackle, Eli Matthews, Kevin Stine, Michael Zarosinski

City Manager Pro Tem Bill Hoke; City Attorney Lori Cooper; City Recorder Karen Spoonts

120. Public Hearings

120.2 CONTINUED – Consideration of a proposed Comprehensive Plan/Urban Growth Boundary Amendment affecting the General Land Use Plan (GLUP) map, the Medford Street Functional Classification Plan of the Transportation Element, and portions of the text of both the Urbanization and GLUP Elements. (CP-14-114)

Councilmembers Bunn and Corcoran recused themselves and left the dais. Principal Planner John Adam presented the staff report stating that Council directed staff to return to the March 17, 2016 meeting so that Council could make a decision. Councilmember Stine questioned which properties requested inclusion as part of option 4; Mr. Adam stated the included properties were Hillcrest Orchards (MD-4), Skinner and Carpenter (west MD-3), Mahar and Hansen (east MD-5). Councilmember Gordon asked Mr. Adam to explain how the findings would be modified if an option were selected; Mr. Adam responded the findings are 95% solid, but Planning would need to adjust the findings to restore the acreage that 1,000 Friends had targeted and the Planning Commission recommended for removal, and to detail the Council's expansion choices. He noted that there was plenty of testimony that he could work into the findings, but that it would also help for Council to vocalize its rationales. He also stated the City hired an outside attorney who will review the revised findings.

Mayor Wheeler noted there is no public hearing on this topic, although it was placed in the hearings portion of the agenda.

Motion: Move to direct staff to work with our outside counsel to prepare an ordinance amending the urban growth boundary of the City of Medford including all associated code amendments and general land use plan revisions with supporting findings of fact based on Option 4 of Exhibit QQQQQ. Included with the ordinance will be commitments binding properties of obligations offered during testimony as follows:

- MD-2 shall include an obligation to reserve land for a school be made to extend for a period of 20 years following final approval of the amendment.

- MD-5 shall provide donation of land for trails per the approved master plan, with the commitment to construct trails that are built concurrent with private development.
- MD-5 East shall provide easements for utilities to allow for the development of adjacent lands currently within the urban growth boundary without ability to provide service in accordance with current Municipal Code.
- MD-5 East in the area commonly referred to as the “Hansen Property” shall provide a commitment to improving the existing Cherry Lane adjacent and along the property frontage by direct construction, Local Improvement District, System Development Surcharge, or other method as determined as acceptable by the City.
- MD-5 West shall provide a deed restriction for open space areas.

Moved by: Michael Zarosinski Seconded by: Dick Gordon

Councilmember Zarosinski stated that in support of the motion he offered the following:

- The amendment is based on all of our Comprehensive Plan Elements, including our Housing Element, which are post acknowledgment plan amendments that have been adopted according to our state land use laws and regulations. As the adopted elements, they form the basis by which we can make our decisions.
- Reliance on our adopted plans thwarts the increase in regional sprawl that has occurred over the past decade. Considering this amendment as an extension of the regional problem solving process, the City of Medford has been involved in expansion of its urban area for over fifteen years. With a full commitment to that process, we as a City have invested considerably in not only time, but money and goodwill to following the best practices of land planning. In that time, other cities have grown disproportionately to Medford due to our lack of available housing stock and options. While Medford suffers from increased congestion from others in the region, following our adopted plans will accommodate the need for housing at higher density levels than the past, provide a balance of housing types to accommodate a wider range of price accessibility, and regionally support the reduction in vehicle miles travelled and greenhouse gas emissions.
- All lands considered for inclusion are within the urban reserves, and as such appropriate to be added. Also, all were fairly considered under Goal 14 evaluation factors, but it is acknowledged that the relative value of each of the included lands cannot be evaluated in purely objective or financial terms. Some areas, such as MD-7 and 8 have easy access to utilities and transportation, but also provide a distribution of land to be included throughout the city. Others, such as

MD-5 East are essential to achieving goals deemed a priority for the City; specifically critical bike path connections from east side park land that will connect to the regional greenway. Whether it is providing areas for aging in place to accommodate the anticipated doubling of our elderly population, or resolving existing enclave issues, each area to be included in this option has particular value for the City of Medford.

- Finally, while the testimony and evidence provided to the community has been voluminous, this option has come with the most support and concessions of the affected property owners and as such best complies with Statewide Planning Goal 1 – Citizen Involvement. Credit should be given to all who worked or volunteered their time on this process as I believe that it meets all the overarching principles guiding land use in Oregon and specifically provides for a healthy environment, sustains a healthy economy, ensures a desirable quality of life, and has equitably allocated the benefits and burdens of land use planning.

City Attorney Lori Cooper questioned whether this would be treated as a periodic review item. Councilmember Zarosinski responded it did not, although it was based on items that were.

Roll call: Councilmembers Bunn, Gordon, Jackle, Matthews, Stine, and Zarosinski voting yes.

Motion carried and so ordered.

Mayor Wheeler thanked staff, especially John Adam, for their work on this. Councilmember Jackle would like to meet with staff pertaining to the findings. Mr. Hoke questioned if he would like this before it comes back as an ordinance; Councilmember Jackle agreed. Mr. Hoke noted he will add this to a study session.

**City Council Study Session Minutes
April 28, 2016**

The Medford City Council Study Session was called to order at 12:00 p.m. in the Medford Room of Medford City Hall on the above date with the following members and staff present:

Mayor Gary Wheeler; Councilmembers Clay Bearnson, Tim Jackle, Eli Matthews, Kevin Stine, Michael Zarosinski

Councilmembers Daniel Bunn, Chris Corcoran and Dick Gordon were absent

City Manager Pro Tem Bill Hoke; City Attorney Lori Cooper; Deputy City Recorder Winnie Shepard; Principal Planner John Adam; Attorney Jeff Condit from Miller, Nash, Graham & Dunn LLP

Principal Planner John Adam walked the Council through the amendments made to the findings and the proposed amendments to the Comprehensive Plan that constitute the Urban Growth Boundary (UGB) amendment. He noted particular changes that came from the testimony:

- The Annexation Policies contain mitigation measures recommended by Oregon Department of Fish and Wildlife (ODFW) for the elk range that touches the far eastern inclusion area
- New provision in the Urban Growth Management Agreement to prevent rezoning of property in the City's UGB. This was suggested by County staff in light of a recent case where unincorporated property was being rezoned to low-density residential, which would be disruptive to realization of the Southeast Plan
- Jeff Condit, Attorney from Miller, Nash et al. prepared new findings to support Council's adherence to adopted housing needs analysis
- Staff borrowed from Zarosinski's summation to supplement the finding
- Process will take at least six months to finalize if County approves

Councilmember Zarosinski asked why there was a complete history of the City's position on the "excess" 153 acres instead of just leaving it out entirely. Mr. Adam believed it was important to show the evolution of the argument. It was bound to be a matter of discussion at subsequent stages of adoption; it seemed better to have all the information up front.

The meeting adjourned to the Executive Session at 12:18 p.m.

APPENDIX M: WRITTEN COMMITMENTS

[Cover Sheet]



July 17, 2015

Medford City Council
411 West 8th Street
Medford, OR 97501

Dear Members of the Medford City Council:

Thank you for your efforts to increase the Urban Growth Boundary for the City of Medford. We know this is a challenging and important process. We agree with the Medford City Planning Commission's recommendation before you tonight regarding the inclusion of the Centennial Property inside the Urban Growth Boundary for the City of Medford.

Rogue Valley Manor has been working with the City for the past 9 years to bring Centennial inside the UGB. The Centennial filed a quasi-judicial UGB amendment in February 2006, shortly before the City initiated its legislative UGB amendment process. Rogue Valley Manor agreed with the City's request for the Manor to suspend the processing of its application and to participate instead in the legislative process which it has for the past 9 years.

We believe the Centennial project has several unique characteristics that make it a perfect fit for inclusion in the UGB Amendment. First, the City's Housing Element recognizes that there will be an increase in the senior population of Medford over the next 20 years. An Active Adult Retirement Community is specifically recognized by the Housing Element as a needed housing option for seniors. The Centennial's proposed Active Adult Retirement Community will carry out this recognized need. This project would be the only gated active adult community in southern Oregon attracting new residents to the Rogue Valley with considerable discretionary income. As you may know, Rogue Valley Manor is one of the most successful retirement communities on the west coast, attracting over 70% of our residents from outside the Rogue Valley. These new residents have made a huge positive impact on the Rogue Valley in many ways. We see the Centennial project having similar positive impacts by attracting even more retirees to the Rogue Valley.

Not only will the Centennial project provide for a special class of housing, our plan is to also include commercial uses along the North Phoenix Road corridor. This would support the proposed employment district to the south and the housing developments proposed to the east. We have also considered the development of a regional retreat or conference center to further support the tourism industry in Medford. The Centennial Golf Course is a great community asset and is the only public championship course in Medford. If the land around Centennial is not included in the UGB Amendment the course would no longer be economically viable and its future would be in jeopardy.

Finally, we have willingly removed 120 acres from our original proposal and will designate the 120 acres of golf course land as open space. This reduction in the amount of developable land at Centennial helped to support the City's inclusion of additional parcels in the UGB recommendation.

We would encourage the Medford City Council to fully support the Planning Commission's recommendation regarding the inclusion of the Centennial property into the UGB for the City of Medford.

Sincerely,



Sue Kupillas

Rogue Valley Manor Board of Directors

Sue Kupillas, Chair

Fred Willms

Bob Mayers

Jim Stocker

April Sevcik

Carol Christlieb

Don Hildebrand

Ray Heysell

Stan Solmonson

Mayor Gary H. Wheeler
And the Medford City Council
4112 West 8th Street
Medford, OR 97501

October 20, 2015

Re: Urban Growth Boundary

Dear Mayor Wheeler and Members of the City Council:

This letter is submitted on behalf of the owners of Tax Lots 37-1W-26-103 and 37-1W-26-104. The owners of these tax lots hereby agree to one of two options relating to the trail system depicted on the enclosed map, to the extent the trail system lies within the boundaries of Tax Lot 103 and Tax Lot 104. Our promises on these matters can be properly ensured with a legal agreement that we are willing to sign and record if our property is included in the UGB. The agreement would be made so it is binding upon future successors in interest. We would sign the legal agreement upon the Council including this land in the UGB but before the same proceeds to Jackson County. The agreement, of course, would provide that it is binding only if ultimate adoption of the UGB by both the City of Medford and Jackson County includes our property and is either not appealed or sustained on appeal.

Option A: The owners will construct the greenway & trail system on their respective tax lots at the owners' expense as they develop and construct the improvements on said tax lots. The owners will dedicate the trail system to the City as it is constructed. This would be the owners' preferred option even though the owners would pay for the trail system.

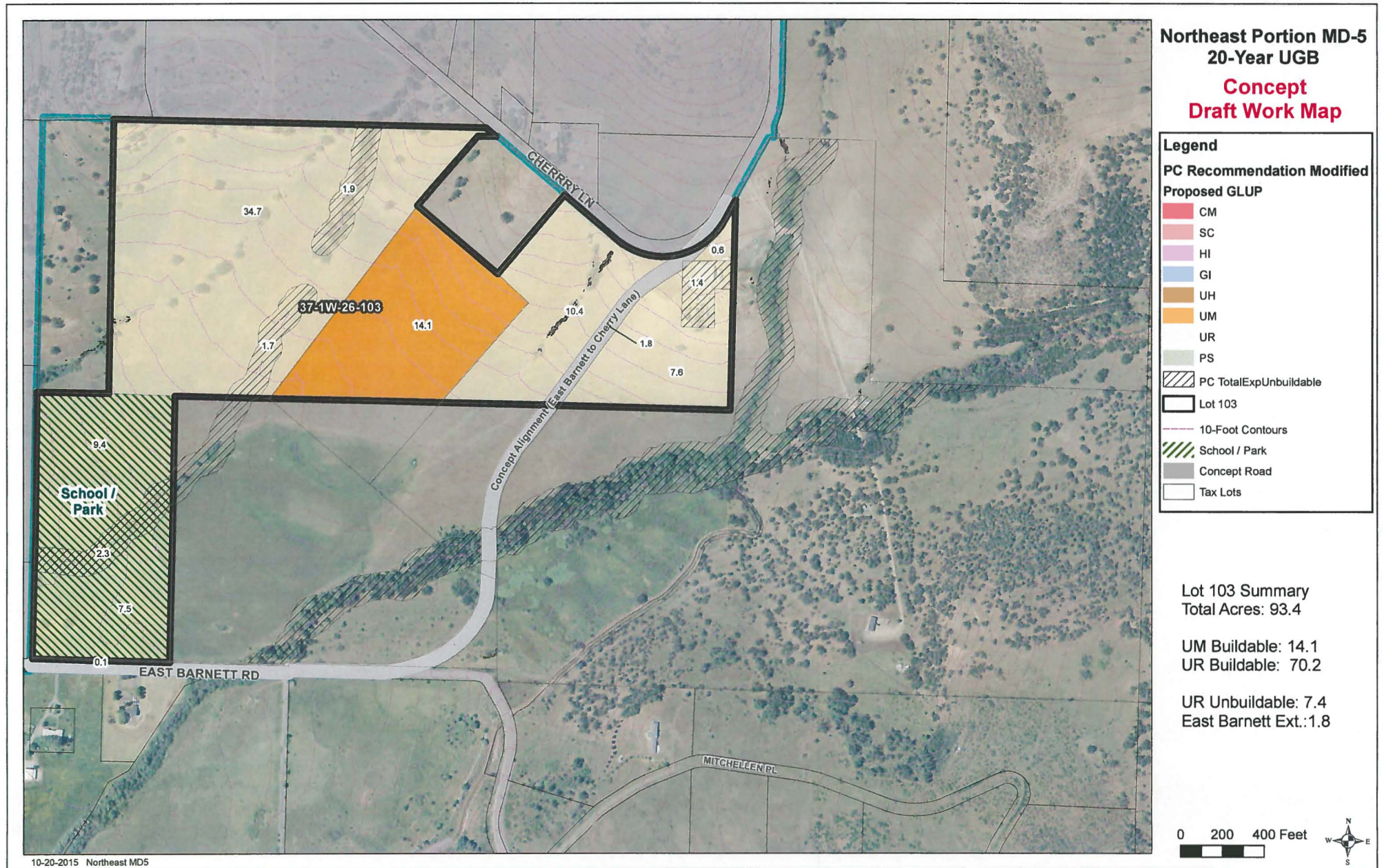
Option B: If the City wants to develop the trail system sooner than the owners develop their property, the owners will grant an easement or dedicate the land to the City to allow the City to construct the trail system in the location mutually agreed upon. Under this Option B scenario, the City would agree that: (1) nothing in the easement or dedication would be allowed to prevent, conflict, or hinder the owners' ability to develop and build out their properties; (2) the owners would have the right to temporarily close the trails for safety reasons during time periods when they are developing and constructing improvements on their properties; (3) the City would install temporary fencing on each side of the trail system so that users of the trail system would not go on to the owners' properties; and (4) the City would be responsible for maintenance and repair of the trail system.

Our intention is always to make good on our promises and we believe the method described above will provide the proper assurances that our promises will be kept.

Very truly yours,



MICHAEL T. MAHAR







Mayor Gary H. Wheeler
And the Medford City Council
4112 West 8th Street
Medford, OR 97501

October 20, 2015

Re: Urban Growth Boundary

Dear Mayor Wheeler and Members of the City Council:

It is important for the council to understand the partnership(s) of Tax Lot 104 is different than Tax Lot 103. The owner groups are not the same. I am the only partner in both properties

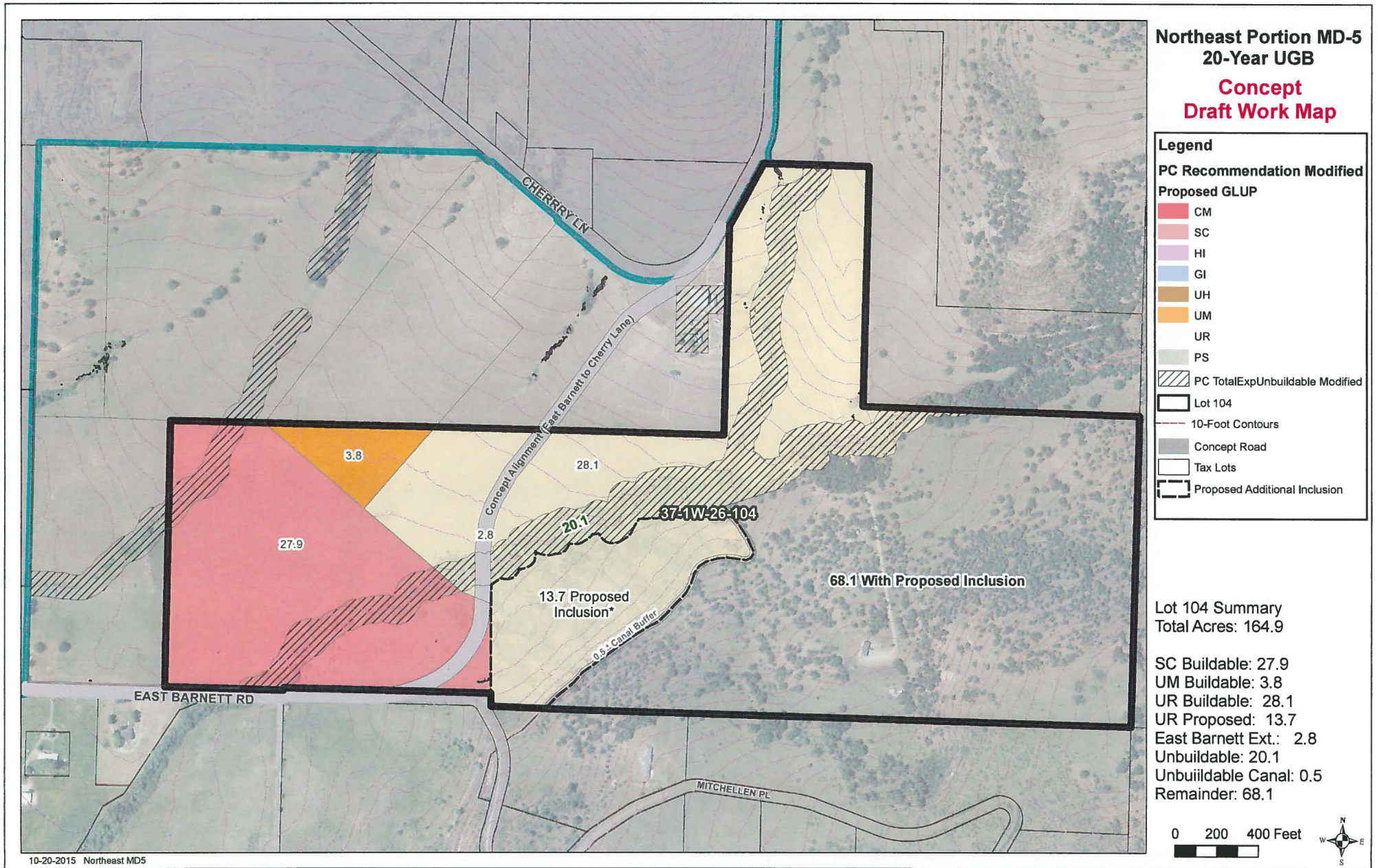
Tax Lot 104 has over 80% of the trail & greenway responsibility. Tax Lot 104 is 165 acres and only has 28.1 acres of standard single family lots, yet will also be responsible to build a larger portion of the extension from Barnett Road to connect with Cherry Lane. Thus it would be greatly appreciated if the council would consider including an additional 13.7 acres to help pay for this very important higher level road. See attached map.

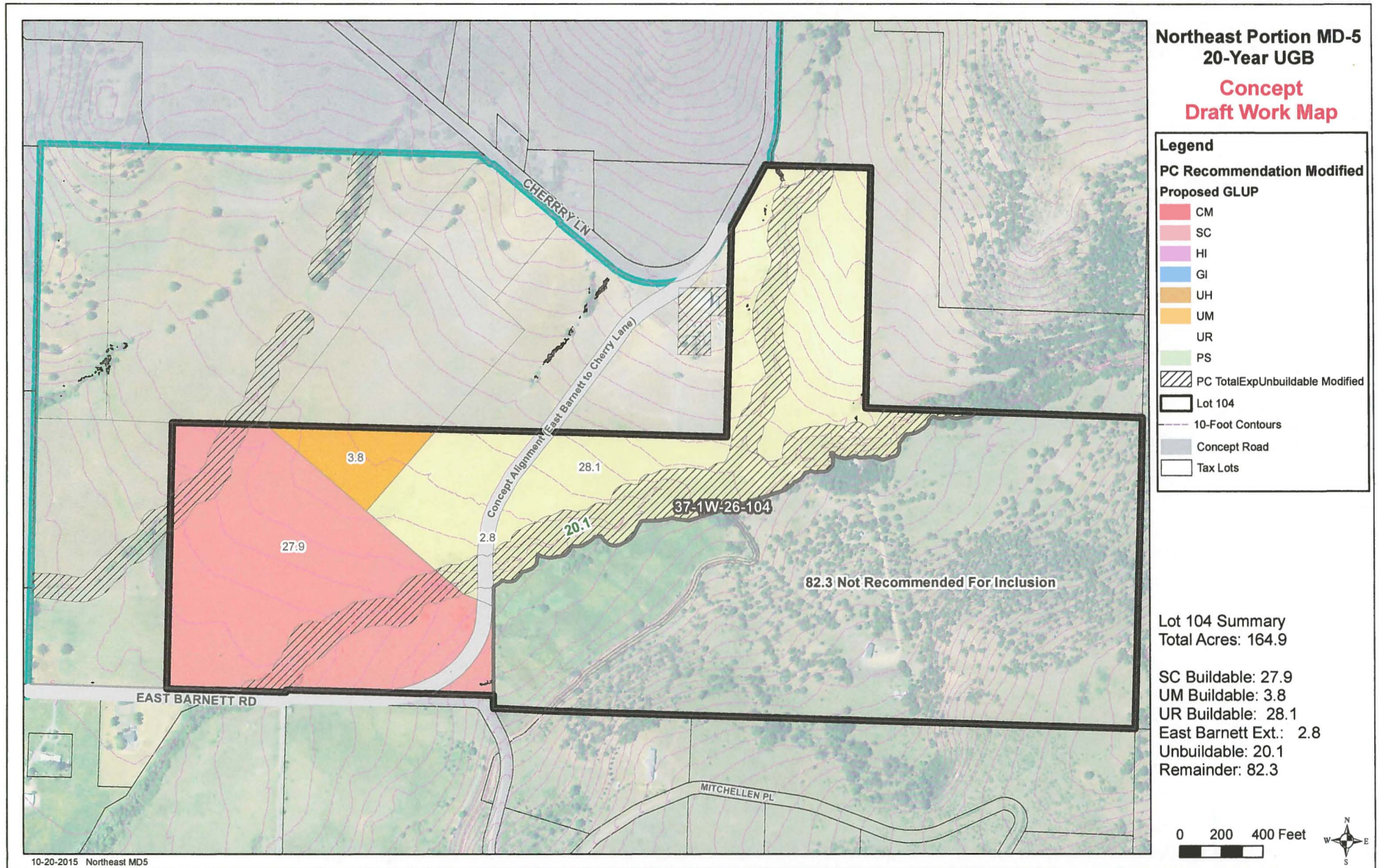
The property owners now have 27.9 acres commercial, 3.8 acres small lots residential and 28.1 standard single family residential for a total of 59.8 acres buildable out of the 165 acres. The commercial area designation was the suggestion of city staff to which the partners agreed. With the inclusion of the 13.7 acres, Tax Lot 104 would have 41.8 acres dedicated to standard single family out of the total of 165 acres.

Consider this request only should there be additional acres at the council's discretion. It is important for the council to understand that our commitment to give the dedications and easements for trail connections is not contingent upon receiving the additional 13.7 acres into the 20 year UGB. As I have said, we are very grateful for the current Planning Commission recommendation to include our portion of MD5. Our reason for this request is to help defray the costs and responsibility for the trails & greenways on Tax Lot 104 and will further aid in the building of the extension of Barnett Road to Cherry Lane.

Very truly yours,

MICHAEL T. MAHAR





November 2nd, 2015

Medford City Council
City of Medford, Lausmann Annex
200 Ivy Street
Medford, OR 97501

RECEIVED

NOV 03 2015

Planning Dept.

Subject: File No. CPA 14-114, Assurances

Dear Honorable Mayor Wheeler and City Councilors,

As the principal owners of the MD-7 Urban Reserve Area (URA), it has come to our attention the City Council is looking for assurances from the owners who have made certain commitments relating to their specific URAs. In this regard, we have proposed to donate 1.5 acres of land for a municipal fire station and 3.5 acres of land to Kids Unlimited of Oregon (Naumes Park Conceptual Plan, October 2014).

However, it's important for the Council to understand the subject land donations are *not* being offered to "induce" MD-7's chances of being included into the City's Urban Growth Boundary. These lands are being donated because we sincerely believe it is appropriate and responsible land use planning to have such essential City services and amenities within a master planned community of 171 acres. That said, we are more than willing to provide such assurances by whatever reasonable means the Council deems is necessary, but to be clear, we are *not* expecting any special consideration due to the land donations and strongly contend MD-7 should stand on its own merits as it relates to the urbanization criteria established by the State of Oregon (Goal 14, OAR 660, Division 24) and the City of Medford (Urbanization Element, Section 1.2.3).

Further, the Naumes Park Conceptual Master Plan outlines the basics of a neo-traditional neighborhood pattern, including land use designations, connected streets, central parks and commercial areas – all of which are based on the City's adopted portion of the Greater Bear Creek Valley Regional Plan (RPS) as well as numerous City Comprehensive Plan goals and policies, with the intent to add evidence into the record that MD-7 also meets the required Performance Indicators (ORS 197.656(2)(B)(C) which include addressing mandated minimum densities, incorporating mixed-use pedestrian friendly designs, general transportation connectivity and required park/open space lands. Finally, substantial evidence has been submitted to the Planning Commission and City Council illustrating how MD-7 easily connects to essential services such as water, sewer, electric and transportation.

In regards to parks and open space, as the Council is aware, such parks and open spaces are also a requirement of the RPS plan in order to provide recreational amenities and add spatial relief as urbanization occurs. Throughout the development of the Conceptual Master Plan and the ESA process, there have been various meetings with the City's Parks and Recreation Commission and City Staff who were appreciative of an "integrated" parks and open space plan and that such

identified park lands were not remnant “leftovers or surplus” properties. With regard to the planned parks and open spaces within the Naumes Park Conceptual Master Plan, such lands *will also be dedicated by the owners* as urbanization occurs. To the question of who pays for their actual development and maintenance, the property owners would be willing to consider a provision similar to that adopted for the Southeast Medford Plan where Park System Development Charges (SDC) paid with each building permit are specifically applied to the dedicated parks within the MD-7 urbanized area.

References have also been made by property owners and proponents relating to “affordable” housing in the MD-7 area. These references relate to geography and market affordability as factual statistics show that West Medford has the most affordable housing stock in the City – for new or existing homes. MD-7’s relatively level topography and it’s overabundant connectivity to multiple sources of water, sewer and transportation infrastructure provide for construction costs to remain competitive and more affordable when compared to other URAs. It should not be construed to suggest Naumes Park will be a low income neighborhood or under any obligation to provide affordable housing beyond any other URA, but instead an integrated neighborhood development that offers competitive housing prices and a mixture of housing types (single-family, apartments, townhomes, etc.).

Overall, the owners contend MD-7 is a superior candidate to be considered for inclusion into the City’s Urban Growth Boundary as already recognized by City’s Planning Staff, Planning Commission and those members of the City Council who recently echoed this opinion during a Council hearing. The owners have put forward conclusive evidence that this urban reserve area exemplifies constructive land use planning as it relates to Statewide Planning Goals, Regional Problem Solving and the City’s Comprehensive Plan Policies and should be included within the City of Medford’s Urban Growth Boundary.

Respectfully,

By:



Date:

11.3.15

Lazaro Ayala, A&D Marsh Lane Property, LLC, Managing Partner

By:



Date:

11/3/15

Michael D. Naumes Naumes, Inc., President

By:



Date:

11/2/15

Rania Sawabini, Haya Enterprises, LLC, Managing Partner

RECEIVED

NOV 11 2015

PLANNING DEPT.

HORNECKER COWLING LLP

Attorneys at Law

John Blackhurst
Joseph E. Kellerman, LL.M.
James A. Wallan
Charles E. Bolen
Ryan J. Vanderhoof
Stefanie L. Burke*
Mark S. Bartholomew
Eric B. Mitton
Michael J. Mayerle
Melisa A. Button*
Shane J. Antholz, LL.M. **
Ryan Kulback

717 Murphy Road
Medford, OR 97504
(541) 779-8900
Fax: (541) 773-2635
www.roguelaw.com

OF COUNSEL

John R. Hassen
R. Ray Heysell

RETIRED

Robert L. Cowling
H. Scott Plouse
P. David Ingalls

Gregory T. Hornecker 1933-2009
B. Kent Blackhurst 1922-2007
Ervin B. Hogan 1927-2000

*Also admitted in California
**Also admitted in Washington

November 11, 2015

Medford City Council
c/o John Adam, Sr. Planner
Lausmann Annex Rm. 240
200 S. Ivy Street
Medford, OR 97501

RE: MD-2

Dear Honorable Mayor Wheeler and Councilors:

This law firm represents the owners of the property in MD-2. As you are likely aware, the owners have executed a binding agreement with Medford School District 549C, whereby as long as all of MD-2 is included in the urban growth boundary amendment, the school district will receive a gift of 20 acres of real property in MD-2.

At a recent council meeting, one councilor mentioned that the existing agreement contains a requirement that the property be annexed prior to the owners being obligated to deed the property to the district. The annexation condition created some concern, because the property owner has some influence over the speed at which the property may be annexed, unlike the urban growth boundary amendment process, which is controlled by the City. As such, the property owners of MD-2 have agreed to remove the requirement for annexation. Thus, as long as the entire MD-2 property is included in the urban growth boundary during this amendment process, the owners of the MD-2 property are obligated to deed 20 acres to the school district.

HORNECKER COWLING LLP

November 11, 2015
Page 2

We have attached the amended agreement, fully executed, which eliminates the annexation requirement, paving the way for the district to receive the 20 acre gift as soon as possible.

Very truly yours,

HORNECKER COWLING LLP



MARK S. BARTHOLOMEW

MSB:lvw
Enclosure

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AMENDED GIFT PLEDGE AGREEMENT

This Amended Gift Pledge Agreement is entered into this 11th day of November, 2015, by and between Coker Butte Development, LLC, an Oregon limited liability company and O'Side Industry, LLC, a California Limited Liability Company (Coker Butte Development, LLC and O'Side Industry, LLC are hereinafter collectively referred to as "Coker Butte"), and Medford School District 549C (hereinafter referred to as the "District").

WHEREAS, Coker Butte and the District entered into a Gift Pledge Agreement ("Original Agreement") on September 15, 2014;

WHEREAS, the Parties desire to modify the Original Agreement to remove a contingency and provide a more clear path for the District to receive the Gift Property;


WHEREAS, for reference purposes, the Original Agreement is attached to this Amended Gift Pledge Agreement.

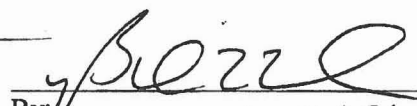
NOW, THEREFORE, the parties agree as follows:

1. Subsection (d) of paragraph 1 of the Original Agreement is hereby deleted and shall not be one of the "Conditions Precedent" as defined in the Original Agreement. For clarity, Paragraph 1(d) is restated as follows: "annexation to the City of Medford and zone change of the Gift Property and any partition, subdivision, or property line adjustment necessary to create a discrete and transferable 20 unit acre of real property in substantially the location and dimensions shown on Exhibit A." The foregoing quoted text is removed from the Original Agreement.
2. The terms of the Original Agreement shall remain in full force and effect so long as they are not inconsistent with this Amended Gift Pledge Agreement.

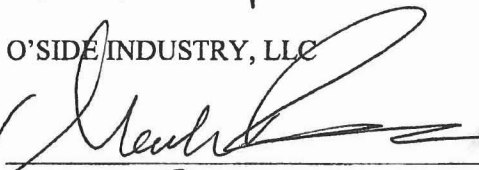
COKE/BUTTE DEVELOPMENT, LLC

MEDFORD SCHOOL DISTRICT 549C


By: Mark Bartholomew
Its: Attorney-in-fact for Coker
Butte Development, LLC


By: BRAD L. EARL
Its: C.O.O.

O'SIDE INDUSTRY, LLC


By: Mark Bartholomew
Its: Attorney-in-fact for O'Side
Industry, LLC

GIFT PLEDGE AGREEMENT

This Gift Pledge Agreement is entered into this 15th day of September, 2014, by and between Coker Butte Development, LLC, an Oregon limited liability company and O'Side Industry, LLC, a California Limited Liability Company (Coker Butte Development, LLC and O'Side Industry, LLC are hereinafter collectively referred to as "Coker Butte"), and Medford School District 549C (hereinafter referred to as the "District").

WHEREAS, Coker Butte owns real property in Jackson County, Oregon that would be beneficial for future District expansion;

WHEREAS, Coker Butte desires to convey real property to the District as a gift on certain conditions and following certain conditions precedent;

WHEREAS, the District desires to receive a gift of real property from Coker Butte in accordance with the terms of this agreement;

WHEREAS, the parties acknowledge that there are various conditions precedent that must occur prior to any gift conveyance to the District and that District's cooperation and support for those conditions shall be necessary;

NOW, WHEREFORE, the parties agree as follows:

1. As provided herein, Coker Butte agrees to gift approximately 20 acres of real property (the "Gift Property") and 20 acres of Coker Butte's existing irrigation rights to the District within one year of the completion of all Conditions Precedent. For purposes of this Agreement, "Conditions Precedent shall mean all of the following: a) adoption of the Gift Property as part of the District's Facilities Plan as provided in Paragraph 2; b) District support as provided in Paragraph 4; c) inclusion of the entire 210-acre Coker Butte property, described on Exhibit B, into the Urban Growth Boundary of the City of Medford; d) annexation to the City of Medford and zone change of the Gift Property and any partition, subdivision, or property line adjustment necessary to create a discrete and transferable 20 acre unit of real property in substantially the location and dimensions shown on Exhibit A; e) District cooperation with Coker Butte as provided in Paragraph 3. Coker Butte shall have the right, but not the obligation, to apply for a zone change on the Gift Property prior to conveyance to the District. Coker Butte may seek any zoning designation, so long as schools are a permitted use in the new zone.
2. Within 45 days of execution of this Agreement, the District shall initiate efforts to identify the Gift Property as a suitable site for its Facilities Plan and begin the process of formally adopting it as part of the Facilities Plan.
3. The District shall reasonably cooperate, so long as there is no cost to the District other than any costs that may be incurred with the District's obligations as set forth in Section 4 of this agreement, with any efforts of Coker Butte to secure entitlements on its property

- described on Exhibit B, including the Gift Property, and/or to establish the value of the Gift Property by appraisal, but such efforts are not required of Coker Butte.
4. The District shall publicly express support for the inclusion of Coker Butte's portion of urban reserve area MD-2 into the Urban Growth Boundary of the City of Medford. Expression of support shall, at a minimum, include written and verbal support at each City of Medford public hearing regarding Urban Growth Boundary expansion. Coker Butte shall provide reasonable advance notice to the District for each such public hearing. However, the District shall not have any direct financial responsibilities and shall not be responsible for making any formal land use applications.
 5. Coker Butte shall gift the Gift Property to the District via bargain and sale deed. The Gift Property shall be free and clear of all encumbrances other than the normal standard exceptions.
 6. The Gift Property shall consist of 20 contiguous gross acres of raw land. Coker Butte makes no promises or warranties regarding any development rights on the Gift Property.
 7. After the conveyance of the Gift Property, the District shall cooperate with Coker Butte in granting reasonable requests for easements for access, drainage, and utilities.
 8. The District shall cooperate with and shall waive remonstrance against any reimbursement district that may affect the Gift Property.
 9. Contemporaneous with the conveyance of the Gift Property or as soon as practicable thereafter, the District shall execute Covenants, Conditions, & Restrictions ("CC&Rs"), requiring that the Gift property be used for School Purposes. "School Purposes" shall mean that the primary use of the Gift Property is for an elementary school, junior high school, high school, or District administrative offices. Following conveyance of the Gift Property to the District, the District shall have 10 years to put the Gift Property to use for School Purposes. The District may unilaterally extend its timeframe for use of the Gift Property for School Purposes for an additional 10 years by notifying Coker Butte in writing within 90 days of the expiration of the original 10 year period following conveyance of the Gift Property to the District. In the event the District fails to use the Gift Property for School Purposes within the timeframes specified herein, the District shall offer to sell the Gift Property to Coker Butte for market value at the time of the sale, based on an appraisal by a licensed appraiser acceptable to both parties. In the event Coker Butte does not purchase the Gift Property following the District's nonuse for School Purposes, the District may convey the Gift Property to another public entity, so long as it is used for park purposes. All of the foregoing shall be memorialized in the CC&Rs. The CC&Rs shall further provide for the waiver of remonstrance provided for in paragraph 8 and shall require that the Gift Property be mowed, watered, and otherwise be maintained in an attractive fashion. The CC&Rs shall benefit the property identified on Exhibit B, less the Gift Property, and shall run with the land.
 10. In the event the conditions precedent are not completed within 5 years, this Agreement shall terminate and the parties shall have no obligations to each other. Notwithstanding the foregoing, Coker Butte shall have the unilateral ability to extend the Agreement for additional terms, the sum of which shall not exceed 5 years beyond the initial term of this Agreement, provided that Coker Butte provide written notice of such extension to the District prior to the expiration of the then-current term.

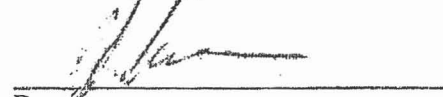
DATED the day and year first above written,

COKER BUTTE DEVELOPMENT, LLC



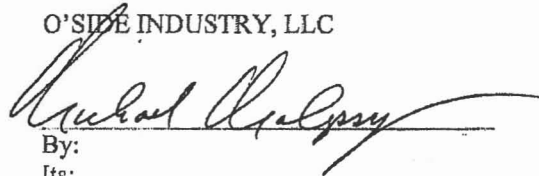
By:
Its:

MEDFORD SCHOOL DISTRICT 549C



By:
Its:

O'SIDE INDUSTRY, LLC



By:
Its:

Kaiser Surveying

19754 Highway 62
Eagle Point, OR 97524

Bary D. Kaiser
R.P.L.S. ORE. 52923

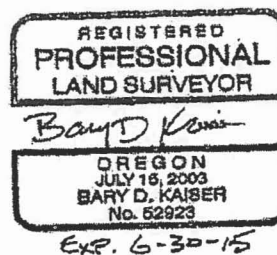
Phone: (541) 878-3995
Fax: (541) 878-3935
E-mail: bkaiser@ambarqmail.com

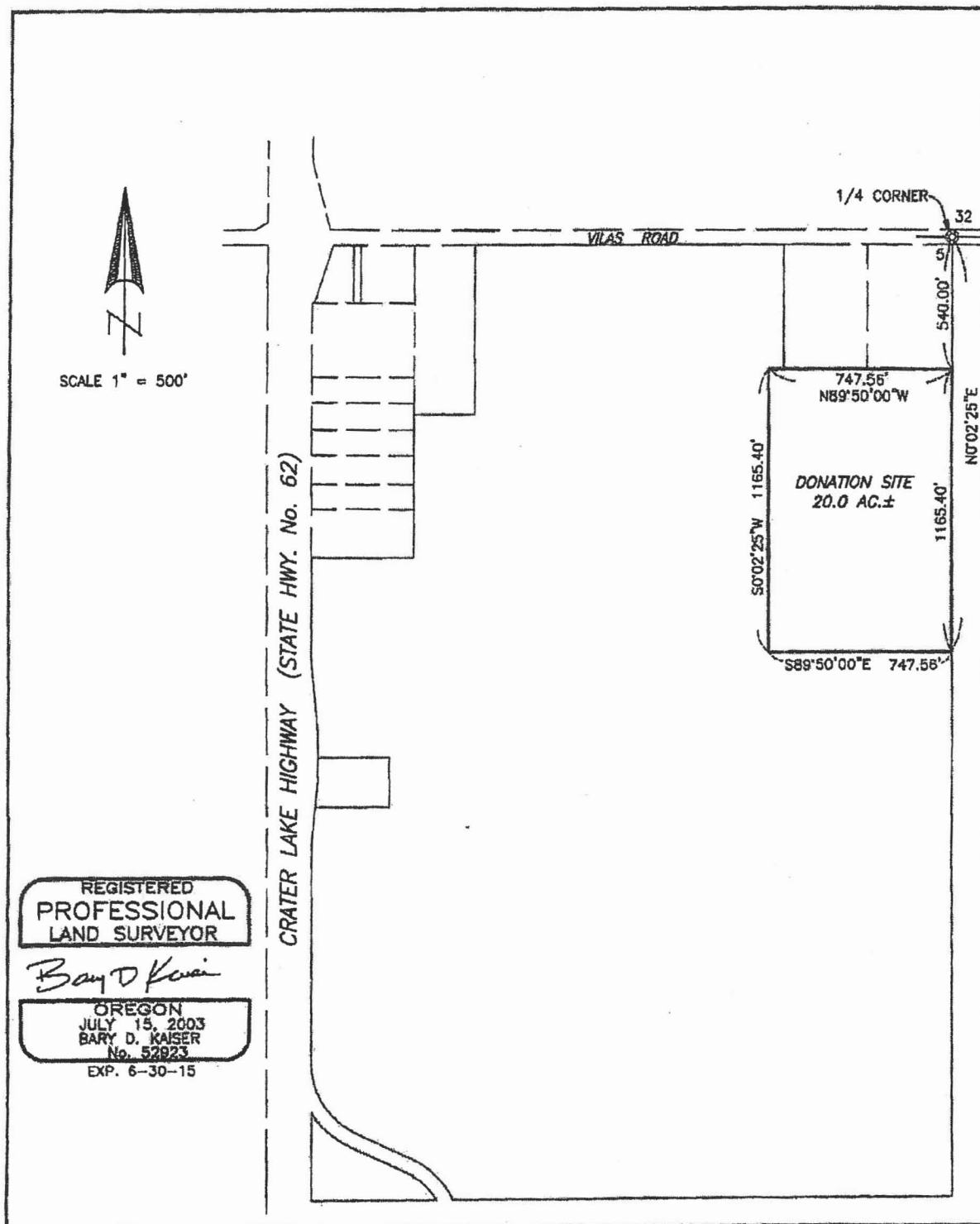
EXHIBIT "A"

**DESCRIPTION OF A 20 ACRE PARCEL LOCATED IN THE NORTHWEST QUARTER OF
SECTION 5, T.37S., R.1W., W.M., IN JACKSON COUNTY, OREGON**

Commencing at the quarter corner common to Section 5, Township 37 South, Range 1 West and Section 32, Township 36 South, Range 1 West of the Willamette Meridian in Jackson County, Oregon; thence along the North-South centerline of said Section 5, South 0° 02' 25" West, 540.00 feet to the Easterly Northeast corner of Parcel No. 2 of Partition Plat recorded July 14, 1993 as Partition Plat No. P-56-1993 of "Records of Partition Plats" in Jackson County, Oregon and filed as Survey No. 13567 in the Office of the County Surveyor for THE TRUE POINT OF BEGINNING; thence along the Northerly boundary of said Parcel No. 2 and the Westerly extension thereof, North 89° 50' 00" West, 747.56 feet; thence South 0° 02' 25" West, 1165.40 feet; thence South 89° 50' 00" East, 747.56 feet to intersect the said North-South centerline of Section 5; thence along said boundary, North 0° 02' 25" East, 1165.40 feet to THE TRUE POINT OF BEGINNING.

August 13, 2014





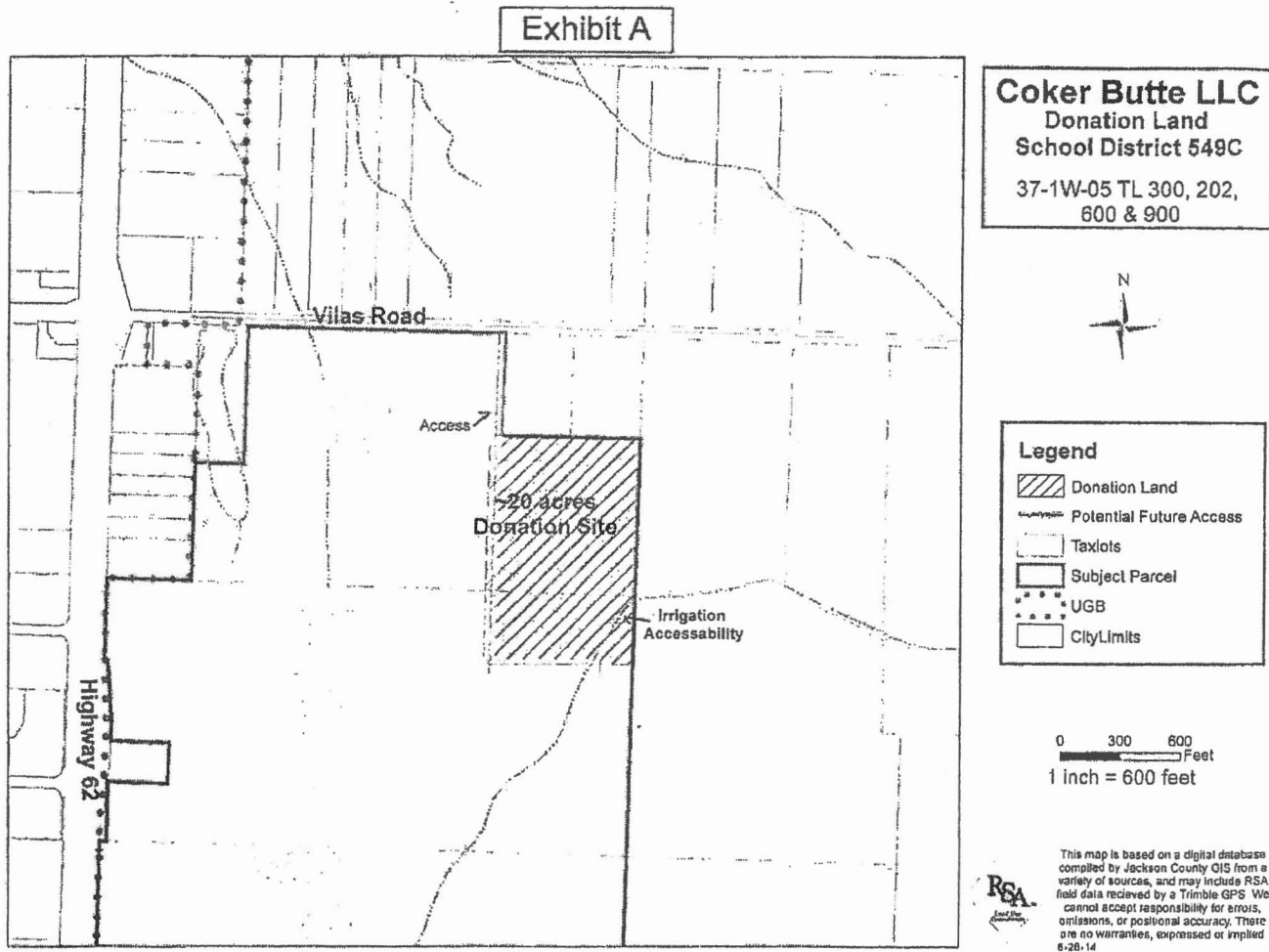


Exhibit "B"

Parcel No. Two (2) of Partition Plat No. P-56-1993 filed July 14, 1993, in Volume 4 Page 56, "Record of Partition Plats" in Jackson County, Oregon, as Survey No. 13567.

(Code 49-15, Account #1-046046-4, Map #371W05, Tax Lot #300)
(Code 49-15, Account #1-046045-6, Map #371W05, Tax Lot #202)

The North Half of the Southwest Quarter of Section 5 in Township 37 South, Range 1 West of the Willamette Meridian in Jackson County, Oregon.

(Code 49-15, Account #1-046057-0, Map #371W05, Tax Lot #900)

The South Half of the Northwest Quarter of Section 5 in Township 37 South, Range 1 West of the Willamette Meridian in Jackson County, Oregon. EXCEPTING THEREFROM that portion conveyed to the State of Oregon, by and through its State Highway Commission, by deed recorded May 10, 1966 as No. 66-05568 of the Official Records of Jackson County, Oregon. ALSO, EXCEPTING THEREFROM the following: Beginning at a point on the easterly right of way line of the relocated Crater Lake Highway in Jackson County, Oregon (being the easterly boundary of the property described in No. 66-05568 of the Official Records of Jackson County, Oregon), said point being 300.0 feet North of the west quarter corner of Section 5 in Township 37 South, Range 1 West of the Willamette Meridian in Jackson County, Oregon, thence East 300.0 feet; thence North 200.0 feet; thence West 300.0 feet, more or less, to the easterly right of way line of said Crater Lake Highway as relocated; thence South, along said right of way line, to the point of beginning.

(Code 49-15, Account #1-046054-7, Map #371W05, Tax Lot #600)