

Chehalem Park and Recreation District

PARKS SYSTEM DEVELOPMENT CHARGE METHODOLOGY REPORT

DRAFT REPORT

April 2017

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Section I. INTRODUCTION

This section describes the policy context and project scope upon which the body of this report is based.

I.A. SYSTEM DEVELOPMENT CHARGES

Oregon Revised Statutes (ORS) 223.297 to 223.314 authorize local governments to establish system development charges (SDCs), one-time fees on new development paid at the time of development. SDCs are intended to recover a fair share of the cost of existing and planned facilities that provide capacity to serve future growth.

ORS 223.299 defines two types of SDCs:

- A reimbursement fee designed to recover “costs associated with capital improvements already constructed, or under construction when the fee is established, for which the local government determines that capacity exists”
- An improvement fee designed to recover “costs associated with capital improvements to be constructed”

ORS 223.304(1) states, in part, that a reimbursement fee must be based on “the value of unused capacity available to future system users or the cost of existing facilities” and must account for prior contributions by existing users and any gifted or grant-funded facilities. The calculation must “promote the objective of future system users contributing no more than an equitable share to the cost of existing facilities.” A reimbursement fee may be spent on any capital improvement related to the system for which it is being charged (whether cash-financed or debt-financed) and on the costs of compliance with Oregon’s SDC law.

ORS 223.304(2) states, in part, that an improvement fee must be calculated to include only the cost of projected capital improvements needed to increase system capacity for future users. In other words, the cost of planned projects that correct existing deficiencies or do not otherwise increase capacity for future users may not be included in the improvement fee calculation. An improvement fee may be spent only on capital improvements (or portions thereof) that increase the capacity of the system for which it is being charged (whether cash-financed or debt-financed) and on the costs of compliance with Oregon’s SDC law.

I.B. UPDATING THE PARKS SDC

The Chehalem Park and Recreation District (District) contracted with FCS GROUP to perform an SDC update. We conducted the study using the following general approach:

- **Policy Framework for Charges.** In this step, we worked with District staff to identify and agree on the approach to be used and the components to be included in the analysis.
- **Technical Analysis.** In this step, we worked with District staff to isolate the recoverable portion of facility costs and calculate SDC rates.
- **Methodology Report Preparation.** In this step, we documented the calculation of the SDC rates included in this report.

I.C. CALCULATION OVERVIEW

In general, SDCs are calculated by adding a reimbursement fee component and an improvement fee component—both with potential adjustments. Each component is calculated by dividing the eligible cost by growth in units of demand. The unit of demand becomes the basis of the charge. **Table 1** shows this calculation in equation format:

Table 1. SDC Equation

Eligible costs of available capacity in existing facilities	+	Eligible costs of capacity-increasing capital improvements	+	Pro-rata share of costs of complying with Oregon SDC law	=	SDC per unit of growth in demand
Units of growth in demand		Units of growth in demand				

I.C.1. Reimbursement Fee

The reimbursement fee is the cost of available capacity per unit of growth that such available capacity will serve. In order for a reimbursement fee to be calculated, unused capacity must be available to serve future growth. For facility types that do not have available capacity, no reimbursement fee may be calculated.

Because the District is currently forming the stormwater utility and transitioning to a separation of stormwater and sewer assets, there is not available capacity. No reimbursement fee will be calculated.

I.C.2. Improvement Fee

The improvement fee is the cost of planned capacity-increasing capital projects per unit of growth that those projects will serve. The unit of growth becomes the basis of the fee. In reality, the capacity added by many projects serves a dual purpose of both meeting existing demand and serving future growth. To compute a compliant improvement fee, growth-related costs must be isolated, and costs related to current demand must be excluded.

We have used the capacity approach to allocate costs to the improvement fee basis.¹ Under this approach, the cost of a given project is allocated to growth by the portion of total project capacity

¹ Two alternatives to the capacity approach are the incremental approach and the causation approach. The incremental requires the computation of hypothetical project costs to serve existing users. Only the incremental cost of the actual project is included in the improvement fee cost basis. The causation approach, which allocates 100 percent of all growth-related projects to growth, is vulnerable to legal challenge.

that represents capacity for future users. That portion, referred to as the improvement fee eligibility percentage, is multiplied by the total project cost for inclusion in the improvement fee cost basis.

I.C.3. Level of Service

The reimbursement and improvement SDC-eligible costs for the parks system are determined by a level of service (LOS), which is typically expressed as a quantity of facility (e.g., acres) per 1,000 residents.

A reimbursement fee is possible if the current LOS exceeds the ultimate identified LOS for the park type. For example, if the District currently has 11 acres of neighborhood parks but only needs 10 acres to serve its current population based on the identified LOS, the district is able to include the one acre above the current required LOS in a reimbursement fee cost basis.

An improvement fee is calculated for the portions of planned projects identified to serve the future population based on the LOS. For example, if a District currently has 10 acres of neighborhood parks and will have 15 acres at the end of the planning period, the five acres added in the planning period would be improvement fee eligible if the LOS determines five acres will serve future users at the identified LOS.

Any park land in the project list that cures an existing deficiency (e.g. if the District needed 10 acres to meet the identified current LOS) or is built in excess of the LOS (e.g. if the District plans to build six acres but only needs five acres for the future population) may not be included in the improvement fee cost basis, as per statute.

In this report, we use three approaches to determining LOS which are described below.

- **Current Level of Service.** This method determines the facility needs using the level of service currently provided to residents. The current amount of parks facilities is divided by the current population amount to derive the current level of service. The level of service is then multiplied by the projected population to determine the facility needs in the future. The current level of service aspiration means that the existing inventory of facilities will have no surpluses or deficiencies. However, if completion of the project list would result in a higher level of service than currently exists, the eligibility percentage would be reduced.
- **Planned Level of Service.** This method determines the facility needs using the level of service targeted by the District in a previously adopted policy such as a comprehensive plan. The targeted level of service is multiplied by the current and projected population to determine both current facility needs and future facility needs. A planned level of service can lead to surpluses if the level of service is lower than the current level of service or deficiencies if facility needs are larger than the current inventory.
- **Realized Level of Service.** This method determines the facility needs using the level of service that the District will have at the end of the planning period after constructing all the projects on its project list. That future level of service is then applied to current population to determine any surpluses or deficiencies in the current inventory.

For purposes of this SDC methodology, each of the District's existing and future park facilities falls into one of the following nine categories.

- Aquatic Centers

- Camp Ground Sites
- Community Recreation Centers
- Cultural Centers
- District Parks
- Holes of Golf
- Recreation, Youth, and Senior Centers
- Soccer Fields
- Trails

I.C.4. Adjustments

Two cost basis adjustments are potentially applicable in the SDC calculation: fund balances and compliance costs.

I.C.4.a Fund Balance

To the extent that SDC revenue is currently available in a fund balance, that revenue should be deducted from its corresponding cost basis. This prevents a jurisdiction from double-charging for projects that will be constructed with fund balance monies.

I.C.4.b Compliance Costs

ORS 223.307(5) authorizes the expenditure of SDCs for “the costs of complying with the provisions of ORS 223.297 to 223.314, including the costs of developing system development charge methodologies and providing an annual accounting of system development charge expenditures.” To avoid spending monies for compliance that might otherwise have been spent on growth-related projects, this report includes an estimate of compliance costs in the SDC calculation.

Section II. COMMON ASSUMPTIONS

This section provides detailed calculations related to common assumptions for the three LOS calculations. These include growth, the underlying reimbursement cost basis, project list, and adjustments.

II.A. GROWTH

Growth is the denominator in both the improvement and reimbursement fee calculations, measured in units that most directly reflect the source of demand. The District's park system serves residents and employees in the Cities of Newberg and Dundee along with portions of unincorporated Yamhill County. For Park SDCs, the most applicable unit of growth is population. Current population for the cities is based on the PSU Population Research Center estimates and the unincorporated population is derived from the District Park Master Plan.

Table 2 shows projected growth in population during the planning period by area within the District. 2034 is the horizon year for the analysis based on conversations with the District. Population is escalated from current levels based on the Yamhill County Population Forecast by respective area.

Table 2. Population Growth

	2010	2016	2017	2034	2017-2034 Change
Newberg	22,110	23,465	23,986	34,832	10,847
Dundee	3,170	3,190	3,249	4,438	1,189
Unincorporated Area	7,439	7,506	7,518	7,713	195
Total Population	32,719	34,161	34,753	46,983	12,230

Source: Chehallem Park and Recreation Park Master Plan, PSU Population Research Center, and Yamhill County Population Forecast.

II.B. REIMBURSEMENT FEE COST BASIS

In order for the District to determine a reimbursement fee cost basis, the District must have a unit cost per park type and total cost of the current parkland. The only easily available data for this is for the District's golf course. **Table 3** shows the original inventory costs for the District net of grants and contributions, current inventory, and a price per hole of golf.

Table 3. Available Inventory Cost Basis

	Unit of Measure	Inventory	Original Cost	Cost per Unit
Holes of Golf	Holes	18.00	\$6,500,000	\$361,111

Source: Chehallem Park and Recreation District.

If the LOS calculation provides for a reimbursement fee, the available capacity (measured in holes of golf) is multiplied by the price per hole of golf to arrive at total reimbursable costs. After defining the total reimbursable costs, we must deduct a pro rata share of debt principle related to the golf course from the calculation to avoid double charging for debt that will be repaid in the future. **Table 4** shows the debt principal related to the golf course for the District.

Table 4. Available Inventory Cost Basis

	Full Faith & Credit Obligations
Total Principal	4,770,000

Source: District staff.

The total cost of the district inventory is only marginally higher than debt principal. This means that any reimbursement costs will be downwardly adjusted by approximately 73 percent to reflect total debt as a share of total inventory costs.

II.C. PROJECT LIST

The District provided a project list which will serve as the basis for calculating the improvement fee. **Table 5** shows the total project costs and the development size by park type. See **Appendix A** for detailed project list.

Table 5. Improvement Fee Cost Basis Summary

	Cost	Amount
Aquatic Centers	\$1,000,000	18,808 sf
Camp Ground Sites	\$3,000,000	75.00
Community Recreation Centers	\$3,000,000	1.00
Cultural Centers	\$9,000,000	1.00
District Parks	\$20,000,000	327.00 ac.
Holes of Golf	\$3,000,000	9.00
Recreation/ Youth/ Sr Centers	\$4,500,000	2.00
Soccer Fields	\$3,000,000	9.00
Trails	\$80,000,000	18.00 mi.
Total	\$126,500,000	

Source: Appendix A.

II.D. ADJUSTMENTS

We must adjust the total SDC cost basis upward for the compliance cost fee basis and downward for existing fund balance. The District will make four adjustments for each SDC calculation, two of which are dependent on the LOS used:

- **District Cost of Administering the SDC.** The District estimates the cost of administering the SDC at eight percent of the SDC cost basis.
- **City/County Cost of Collecting the SDC.** The City and County collect SDCs for the District and collects five percent of the fee as an administrative charge.
- **Cost of SDC Methodology.** During the analysis period, the District estimates it will complete four SDC methodology studies at a total cost of \$80,000 during the analysis period. This amount stays constant in each LOS calculation.
- **Fund Balance.** The outstanding fund balance is deducted from each LOS calculation, totaling \$342,550.

Section III. SDC CALCULATIONS

This section provides detailed SDC calculations based on each level of service.

III.A. CURRENT LEVEL OF SERVICE

This section calculates the SDC based on the current LOS. This method determines the facility needs using the level of service currently provided to residents.

III.A.1. Facility Needs Determination

Facility needs are determined by the current level of service, expressed as a quantity of facility (e.g., acres) per 1,000 residents. **Table 6** shows how the inputs of inventory, growth, and projects come together to determine the proportion of project costs that can be recovered in an improvement fee.

Table 6. Inventory and Needs

Inventory and Needs	Aquatic Centers	Camp Ground Sites	Community Recreation Centers	Cultural Centers	District Parks	Holes of Golf	Recreation/ Youth/ Sr Centers	Soccer Fields	Trails
Units of Measurement	SF	Sites	Count	Count	Acres	Holes	Count	Fields	Miles
Inventory									
Current Inventory	21,192 sf	96.00	0.00	1.00	469.29 ac.	18.00	3.00	3.00	4.67 mi.
Planned Projects	18,808 sf	75.00	1.00	1.00	327.00 ac.	9.00	2.00	9.00	18.00 mi.
Inventory at Completion of Planned Projects	40,000 sf	171.00	1.00	2.00	796.29 ac.	27.00	5.00	12.00	22.67 mi.
Level of Service - Current									
Level of Service per 1,000 Residents	609.80	2.76	0.00	0.03	13.50	0.52	0.09	0.09	0.13
Required Inventory Based on Level of Service									
Required in 2017	21,192 sf	96.00	0.00	1.00	469.29 ac.	18.00	3.00	3.00	4.67 mi.
Required to Accommodate Growth	7,458 sf	33.78	0.00	0.35	165.15 ac.	6.33	1.06	1.06	1.64 mi.
Required in 2034	28,650 sf	129.78	0.00	1.35	634.44 ac.	24.33	4.06	4.06	6.31 mi.
Analysis of Planned Park Development									
Curing Deficiency	0 sf	0.00	0.00	0.00	0.00 ac.	0.00	0.00	0.00	0.00 mi.
Accommodating Growth	7,458 sf	33.78	0.00	0.35	165.15 ac.	6.33	1.06	1.06	1.64 mi.
Excess	11,350 sf	41.22	1.00	0.65	161.85 ac.	2.67	0.94	7.94	16.36 mi.
Total Park Development	18,808 sf	75.00	1.00	1.00	327.00 ac.	9.00	2.00	9.00	18.00 mi.
Improvement Fee Eligibility									
Percent of Total Project Costs	39.65%	45.05%	0.00%	35.19%	50.51%	70.38%	52.79%	11.73%	9.13%
Reimbursement Fee Eligibility									
Eligible Inventory	0 sf	0.00	0.00	0.00	0.00 ac.	0.00	0.00	0.00	0.00 mi.

Source: Chehalis Park and Recreation District

The table above begins the analysis of future needs by looking at the current inventory of park facilities by category. For example, in the 'Inventory' section for district Parks, the District currently has 469.29 acres and plans to develop an additional 327 acres, totaling 796.29 acres at the end of the planning period.

The next section, 'Level of Service – Current' shows the LOS used to define SDC-eligible needs. The District has a current LOS for district parks of 13.50 acres per 1,000 residents. This will be different for each LOS calculation method.

The next section, 'Required Inventory Based on Level of Service', shows the amount of park development required based on the LOS identified above. Applying the LOS to the future population

results in the required inventory in 2034, 634.44 acres. The difference, 165.15 acres, is improvement fee eligible.

The next section, 'Analysis of Planned Development', divides the planned project acreage into three categories. The 'Curing Deficiency' portion is the amount of acreage that the District must add to achieve the LOS as dictated in 2017. Put differently, the 'Current Inventory' must at least equal the 'Required in 2017' inventory before any improvement fee eligible costs can be calculated. The 'Accommodating Growth' portion is the acreage that is improvement fee eligible. Improvement fee eligible acreage has an upward limit equal to the amount in 'Required to Accommodate Growth'. The final portion, 'Excess', is any park development which increases the LOS for the District during the planning period. That portion of the project list which increases the LOS for district parks beyond 13.5 acres per 1,000 residents is not included (or includable) in the improvement fee calculation.

The next section, 'Improvement Fee Eligibility', calculates the percent of project costs by park type that can be included in the improvement fee. This is the row 'Accommodating Growth' divided by the row 'Total Park Development'.

The final section, 'Reimbursement Fee Eligibility', shows the amount of inventory that is eligible for the reimbursement cost basis. If the 'Current Inventory' is greater than the 'Required Inventory in 2017', the excess is here and considered in the reimbursement cost basis.

Based on the current LOS, the improvement fee eligibility is reduced because the District intends to increase the LOS beyond what is currently available for all park types. The Community Center is not SDC eligible because the District currently has none so the current LOS is zero.

There is also no inventory eligible for the reimbursement fee and therefore no reimbursement fee using the current LOS approach. This makes analytical sense because using the current LOS precludes the District from having current inventory in excess of the current LOS.

III.A.2. Improvement Fee Calculation

To derive the improvement fee, we must apply the improvement fee eligibility percentages from **Table 6** to the project list costs. The improvement fee eligibility reflects the amount of the project list that will provide capacity for future residents at the end of the planning period. **Table 7** shows the improvement fee eligible costs by category. After calculating the total improvement eligible costs, we divide by the total project costs by the population growth during the planning period. The result is the per capita improvement fee unit cost.

Table 7. Project Cost Improvement Fee Eligibility

	Total Project Costs	Percent Eligible for Improvement Fee	Improvement Fee Eligible Costs
Aquatic Centers	\$1,000,000	39.65%	\$396,529
Camp Ground Sites	\$3,000,000	45.05%	\$1,351,378
Community Recreation Centers	\$3,000,000	0.00%	\$0
Cultural Centers	\$9,000,000	35.19%	\$3,167,291
District Parks	\$20,000,000	50.51%	\$10,101,109
Holes of Golf	\$3,000,000	70.38%	\$2,111,528
Recreation/ Youth/ Sr Centers	\$4,500,000	52.79%	\$2,375,469
Soccer Fields	\$3,000,000	11.73%	\$351,921
Trails	\$80,000,000	9.13%	\$7,304,321
Total	\$126,500,000		\$27,159,545

	Total Project Costs	Percent Eligible for Improvement Fee	Improvement Fee Eligible Costs
<i>Population Growth 2017-2034</i>			12,230
Improvement Fee per Capita			\$2,221

Source: Previous tables.

III.A.3. Adjustment Calculation

The total adjustment amount is based on an estimate of accounting costs associated with the SDC program along with the cost of SDC methodology studies and reduction in fund balance. **Table 8** shows the adjustments based on the current LOS.

Table 8. Adjustments

	Amount
District Cost of Administering the SDC (8% of cost basis)	\$2,172,764
City/County Cost of Collecting the SDC (5% of cost basis)	1,357,977
Cost of SDC Methodology (\$20k, 4 studies)	80,000
Fund Balance	(342,550)
Total Adjustments	\$3,268,191
<i>Population Growth 2017-2034</i>	12,230
Adjustment per capita	\$267

Source: Chehalem PRD staff.

III.A.4. Total SDC Summary

A summary of the SDC unit cost is listed in **Table 9**. The total SDC includes the improvement fee and compliance fee. As noted above, the LOS approach taken precludes a reimbursement fee cost basis.

Table 9. SDC Component Summary

	Reimbursement Fee	Improvement Fee	Compliance Fee and Adjustments	Total
SDC per Capita	\$0	\$2,221	\$267	\$2,488

Source: Previous tables.

III.B. ADOPTED LEVEL OF SERVICE

This section calculates the SDC based on the adopted LOS. This method determines the facility needs using the level of service targeted by the District in a previously adopted policy such as a comprehensive plan.

III.B.1. Facility Needs Determination

Facility needs are determined by the adopted level of service from the Chehalem Park and Recreation Master Plan, expressed as a quantity of facility (e.g., acres) per 1,000 residents. We have included adopted levels of service for all park types available in the Master Plan. The LOS for certain park types without an identified LOS in the Master Plan are calculated as the current LOS because the Master Plan noted residents were satisfied with the current LOS.

Facility needs are determined by the adopted level of service, expressed as a quantity of facility (e.g., acres) per 1,000 residents. **Table 10** shows how the inputs of inventory, growth, and projects come together to determine the proportion of project costs that can be recovered in an improvement fee.

Table 10. Inventory and Needs

Inventory and Needs	Aquatic Centers	Camp Ground Sites	Community Recreation Centers	Cultural Centers	District Parks	Holes of Golf	Recreation/ Youth/ Sr Centers	Soccer Fields	Trails
Units of Measurement	SF	Sites	Count	Count	Acres	Holes	Count	Fields	Miles
Inventory									
Current Inventory	21,192 sf	96.00	0.00	1.00	469.29 ac.	18.00	3.00	3.00	4.67 mi.
Planned Projects	18,808 sf	75.00	1.00	1.00	327.00 ac.	9.00	2.00	9.00	18.00 mi.
Inventory at Completion of Planned Projects	40,000 sf	171.00	1.00	2.00	796.29 ac.	27.00	5.00	12.00	22.67 mi.
Level of Service - Adopted									
Level of Service per 1,000 Residents	848	2.76*	0.02	0.04	13.50*	0.36	0.04	0.27**	0.20**
Required Inventory Based on Level of Service									
Required in 2017	29,459 sf	96.00	0.70	1.39	469.29 ac.	12.51	1.39	9.27	6.95 mi.
Required to Accommodate Growth	10,367 sf	33.78	0.24	0.49	165.15 ac.	4.40	0.49	3.26	2.45 mi.
Required in 2034	39,826 sf	129.78	0.94	1.88	634.44 ac.	16.91	1.88	12.53	9.40 mi.
Analysis of Planned Park Development									
Curing Deficiency	8,267 sf	0.00	0.70	0.39	0.00 ac.	0.00	0.00	6.27	2.28 mi.
Accommodating Growth	10,367 sf	33.78	0.24	0.49	165.15 ac.	0.00	0.00	2.73	2.45 mi.
Excess	174 sf	41.22	0.06	0.12	161.85 ac.	9.00	2.00	0.00	13.27 mi.
Total Park Development	18,808 sf	75.00	1.00	1.00	327.00 ac.	9.00	2.00	9.00	18.00 mi.
Improvement Fee Eligibility									
Percent of Total Project Costs	55.12%	45.05%	24.46%	48.92%	50.51%	0.00%	0.00%	30.36%	13.59%
Reimbursement Fee Eligibility									
Eligible Inventory	0 sf	0.00	0.00	0.00	0.00 ac.	5.49	1.61	0.00	0.00 mi.

Source: Chehalis Park and Recreation District and Parks Master Plan.

*Current Level of Service assumed to be adopted level of service based on Parks Master Plan statement. *The following are the facility needs as projected by the standards listed above and current inventory. In 1992 prior to 1994 Park Master Plan the patrons of the District were satisfied with the current services. Our recent surveys seem to indicate satisfaction by the District patrons."

**Levels of service identified are a combination of two separate but similar facility types from the Parks Master Plan.

Based on the adopted LOS, the District has several park types which are currently deficient and therefore have decreased improvement fee eligibility. Additionally, the District plans to build above the adopted LOS for several park types.

The two park types with no eligibility have enough capacity to satisfy current and future users. Both of these park types, holes of golf and recreation/youth/senior centers, are eligible for a reimbursement fee.

III.B.2. Reimbursement Fee Calculation

In order to determine a reimbursement fee, we must apply the price per unit of land from **Table 3** to the reimbursable inventory derived from **Table 10**. **Table 11** multiplies the reimbursable inventory by the price per hole of golf to arrive at total reimbursable costs.

Table 11. Level of Service Surplus Calculation

Park Type	Unit of Measure	Inventory Exceeding LOS	Less: Facilities Funded by Grants	Total Surplus	Price per Unit of Land	Inventory Surplus Cost Basis
Holes of Golf	Holes	5.49	0.00	5.49	\$361,111	\$1,982,175

Source: Previous tables and Chehalis Park and Recreation District.

After arriving at total reimbursable costs, we must deduct a pro rata share of the debt principal based on total inventory costs. **Table 12** shows the deducted share of debt principal to arrive at a

reimbursement fee cost basis. The resulting reimbursement fee per capita is approximately \$43 because of the ratio of debt principal to total inventory costs as noted above.

Table 12. Reimbursement Fee Eligibility Calculation

Level of Service Surpluses	Cost
Reimbursable Costs	\$1,982,175
Less: Pro Rata Share of Debt Principal Related to Golf Course	-1,454,611
Reimbursement Fee Cost Basis	\$527,563
<i>Population Growth 2017-2034</i>	12,230
Reimbursement Fee per Capita	\$43

Source: District staff.

III.B.3. Improvement Fee Calculation

To derive the improvement fee, we must apply the improvement fee eligibility percentages from **Table 10** to the project list costs. The improvement fee eligibility reflects the amount of the project list that will provide capacity for future residents at the end of the planning period. **Table 13** shows the improvement fee eligible costs by category. After calculating the total improvement eligible costs, we divide by the total project costs by the population growth during the planning period. The result is the per capita improvement fee unit cost.

Table 13. Project Cost Improvement Fee Eligibility

	Total Project Costs	Percent Eligible for Improvement Fee	Improvement Fee Eligible Costs
Aquatic Centers	\$1,000,000	55.12%	\$551,215
Camp Ground Sites	\$3,000,000	45.05%	\$1,351,378
Community Recreation Centers	\$3,000,000	24.46%	\$733,809
Cultural Centers	\$9,000,000	48.92%	\$4,402,852
District Parks	\$20,000,000	50.51%	\$10,101,109
Holes of Golf	\$3,000,000	0.00%	\$0
Recreation/ Youth/ Sr Centers	\$4,500,000	0.00%	\$0
Soccer Fields	\$3,000,000	30.36%	\$910,889
Trails	\$80,000,000	13.59%	\$10,871,239
Total	\$126,500,000		\$28,922,489
<i>Population Growth 2017-2034</i>			12,230
Improvement Fee per Capita			\$2,365

Source: Previous tables.

III.B.4. Adjustment Calculation

The total adjustment amount is based an estimate of accounting costs associated with the SDC program along with the cost of SDC methodology studies and reduction in fund balance. **Table 14** shows the adjustments based on the adopted LOS.

Table 14. Adjustments

	Amount
District Cost of Administering the SDC (8% of cost basis)	\$2,356,004
City/County Cost of Collecting the SDC (5% of cost basis)	1,472,503
Cost of SDC Methodology (\$20k, 4 studies)	80,000
Fund Balance	(342,550)
Total Adjustments	\$3,565,957
<i>Population Growth 2017-2034</i>	12,230
Adjustment per capita	\$292

Source: Chehalem PRD staff.

III.B.5. Total SDC Summary

A summary of the SDC unit cost is listed in **Table 15**. The total SDC includes the reimbursement fee, improvement fee, and compliance fee.

Table 15. SDC Component Summary

	Reimbursement Fee	Improvement Fee	Compliance Fee and Adjustments	Total
SDC per Capita	\$43	\$2,365	\$292	\$2,700

Source: Previous tables.

III.C. REALIZED LEVEL OF SERVICE

This section calculates the SDC based on the realized LOS. This method determines the facility needs using the level of service that the District will have at the end of the planning period after constructing all the projects on its project list.

III.C.1. Facility Needs Determination

Facility needs are determined by the LOS the District will have at the end of the planning period, expressed as a quantity of facility (e.g., acres) per 1,000 residents. **Table 16** shows how the inputs of inventory, growth, and projects come together to determine the proportion of project costs that can be recovered in an improvement fee.

Table 16. Inventory and Needs

Inventory and Needs	Aquatic Centers	Camp Ground Sites	Community Recreation Centers	Cultural Centers	District Parks	Holes of Golf	Recreation/ Youth/ Sr Centers	Soccer Fields	Trails
Units of Measurement	SF	Sites	Count	Count	Acres	Holes	Count	Fields	Miles
Inventory									
Current Inventory	21,192 sf	96.00	0.00	1.00	469.29 ac.	18.00	3.00	3.00	4.67 mi.
Planned Projects	18,808 sf	75.00	1.00	1.00	327.00 ac.	9.00	2.00	9.00	18.00 mi.
Inventory at Completion of Planned Projects	40,000 sf	171.00	1.00	2.00	796.29 ac.	27.00	5.00	12.00	22.67 mi.
Level of Service - Realized									
Level of Service per 1,000 Residents	851.38	3.64	0.02	0.04	16.95	0.57	0.11	0.26	0.48
Required Inventory Based on Level of Service									
Required in 2017	29,588 sf	126.49	0.74	1.48	589.01 ac.	19.97	3.70	8.88	16.77 mi.
Required to Accommodate Growth	10,412 sf	44.51	0.26	0.52	207.28 ac.	7.03	1.30	3.12	5.90 mi.
Required in 2034	40,000 sf	171.00	1.00	2.00	796.29 ac.	27.00	5.00	12.00	22.67 mi.
Analysis of Planned Park Development									
Curing Deficiency	8,396 sf	30.49	0.74	0.48	119.72 ac.	1.97	0.70	5.88	12.10 mi.
Accommodating Growth	10,412 sf	44.51	0.26	0.52	207.28 ac.	7.03	1.30	3.12	5.90 mi.
Excess	0 sf	0.00	0.00	0.00	0.00 ac.	0.00	0.00	0.00	0.00 mi.
Total Park Development	18,808 sf	75.00	1.00	1.00	327.00 ac.	9.00	2.00	9.00	18.00 mi.
Improvement Fee Eligibility									
Percent of Total Project Costs	55.36%	59.35%	26.03%	52.06%	63.39%	78.09%	65.08%	34.71%	32.78%
Reimbursement Fee Eligibility									
Eligible Inventory	0 sf	0.00	0.00	0.00	0.00 ac.	0.00	0.00	0.00	0.00 mi.

Source: Chehalis Park and Recreation District

Based on the realized LOS, the District has several park types which are currently deficient. However, there is also no 'excess' parks capacity since the realized LOS at the end of the planning period is the metric by which we determine the improvement fee eligibility.

III.C.2. Improvement Fee Calculation

To derive the improvement fee, we must apply the improvement fee eligibility percentages from **Table 16** to the project list costs. The improvement fee eligibility reflects the amount of the project list that will provide capacity for future residents at the end of the planning period. **Table 17** shows the improvement fee eligible costs by category. After calculating the total improvement eligible costs, we divide by the total project costs by the population growth during the planning period. The result is the per capita improvement fee unit cost.

Table 17. Project Cost Improvement Fee Eligibility

	Total Project Costs	Percent Eligible for Improvement Fee	Improvement Fee Eligible Costs
Aquatic Centers	\$1,000,000	55.36%	\$553,620
Camp Ground Sites	\$3,000,000	59.35%	\$1,780,534
Community Recreation Centers	\$3,000,000	26.03%	\$780,936
Cultural Centers	\$9,000,000	52.06%	\$4,685,615
District Parks	\$20,000,000	63.39%	\$12,677,908
Holes of Golf	\$3,000,000	78.09%	\$2,342,808
Recreation/ Youth/ Sr Centers	\$4,500,000	65.08%	\$2,928,509
Soccer Fields	\$3,000,000	34.71%	\$1,041,248
Trails	\$80,000,000	32.78%	\$26,227,875
Total	\$126,500,000		\$53,019,053
<i>Population Growth 2017-2034</i>			12,230
Improvement Fee per Capita			\$4,335

Source: Previous tables.

III.C.3. Adjustment Calculation

The total adjustment amount is based an estimate of accounting costs associated with the SDC program along with the cost of SDC methodology studies and reduction in fund balance. **Table 14** shows the adjustments based on the realized LOS.

Table 18. Adjustments

	Amount
District Cost of Administering the SDC (8% of cost basis)	\$4,241,524
City/County Cost of Collecting the SDC (5% of cost basis)	2,650,953
Cost of SDC Methodology (\$20k, 4 studies)	80,000
Fund Balance	(342,550)
Total Adjustments	\$6,629,927
<i>Population Growth 2017-2034</i>	12,230
Adjustment per capita	\$542

Source: Chehalis PRD staff.

III.C.4. Total SDC Summary

A summary of the SDC unit cost is listed in **Table 19**. The total SDC includes the reimbursement fee, improvement fee, and compliance fee. As noted above, there are no eligible reimbursement fee costs.

Table 19. SDC Component Summary

	Reimbursement Fee	Improvement Fee	Compliance Fee and Adjustments	Total
SDC per Capita	\$0	\$4,335	\$542	\$4,877

Source: Previous tables.

Section IV. CONCLUSION

This section summarizes the calculated SDCs for residential development. It also addresses policies related to implementation of the SDC program.

IV.A. CALCULATED SDC

Table 20 shows calculated SDC unit costs as shown above for each LOS methodology. The unit costs are expressed as per capita because the number of residents serves as the growth calculation for the SDC.

Table 20. SDC Component Summary – Per Capita Charge

	Reimbursement Fee	Improvement Fee	Compliance Fee and Adjustments	Total
Current LOS per 1,000 residents	\$0	\$2,221	\$267	\$2,488
Adopted LOS per 1,000 residents	\$43	\$2,365	\$292	\$2,700
Realized LOS per 1,000 residents	\$0	\$4,335	\$542	\$4,877

Source: Previous tables.

Each methodology produces different fees. The current LOS produces the lowest SDC calculation while the realized LOS produces the highest. It is notable that the adopted LOS also produces the only reimbursement fee calculation because of the relatively low adopted standard for holes of golf compared to what is actually provided.

The per capita SDC unit cost shown above must be converted to dwelling units to reflect a basis for SDCs levied by the District. SDCs for residential development are calculated by multiplying the average number of occupants (by housing category) by the corresponding unit cost. The data used to determine people per dwelling unit type is based on Newberg and Dundee Census data.

Table 21. SDC Fee Summary

	Number of People	Adopted LOS	Current LOS	Realized LOS
Single Family per Unit	2.76	\$7,450	\$6,866	\$13,459
Multifamily per Unit	2.43	\$6,561	\$6,046	\$11,853
Manufactured Home per Unit	1.90	\$5,120	\$4,719	\$9,251

Source: Previous tables and U.S. Census American Community Survey.

IV.B. CREDITS, EXEMPTIONS, AND WAIVERS

The District will continue to establish local policies for issuing credits, exemptions, and other administrative procedures.

IV.B.1. Credits

A credit is a reduction in the amount of the SDC for a specific development. ORS 223.304 requires that SDC credits be issued for the construction of a qualified public improvement which is: required as a condition of development approval; identified in the District’s adopted SDC project list; and

either “not located on or contiguous to property that is the subject of development approval,” or located “on or contiguous to such property and is required to be built larger or with greater capacity than is necessary for the particular development project....”

Additionally, a credit must be granted “only for the cost of that portion of an improvement which exceeds the minimum standard facility size or capacity needed to serve” the particular project up to the amount of the improvement fee. For multi-phase projects, any “excess credit may be applied against SDCs that accrue in subsequent phases of the original development project.”

IV.B.2. Exemptions & Waivers

The District may exempt or waive specific classifications of development from the requirement to pay stormwater SDCs. However, to do so it must have a cost or demand-based justification. The District may not arbitrarily exempt customers or customer types from SDCs.

IV.C. INDEXING

Oregon law (ORS 223.304) also allows for the periodic indexing of system development charges for inflation, as long as the index used is:

- “(A) A relevant measurement of the average change in prices or costs over an identified time period for materials, labor, real property or a combination of the three;
- (B) Published by a recognized organization or agency that produces the index or data source for reasons that are independent of the system development charge methodology; and
- (C) Incorporated as part of the established methodology or identified and adopted in a separate ordinance, resolution or order.”

We recommend that the District index its charges to the Engineering News Record Construction Cost Index for the District of Seattle and adjust its charges annually.

IV.D. SDC COMPARISONS

Table 22 compares the calculated maximum defensible SDCs to the current SDCs adopted by the District. All three LOS approaches produce a higher maximum defensible SDC than the current SDC levied by the District.

Table 22. SDC Fee Comparison

	Single Family	Multi-Family	Manufactured Home
Current Fee	\$2,017	\$1,475	\$1,475
Current LOS	\$6,866	\$6,046	\$4,719
Adopted LOS	\$7,450	\$6,561	\$5,120
Realized LOS	\$13,459	\$11,853	\$9,251

Source: Previous tables and Chehalem PRD.

Table 23 compares the District’s SDCs compared to surrounding jurisdictions and Park and Recreation Districts (PRDs). The District currently has the lowest surveyed SDC but, depending on the LOS approach, can have a higher SDC than some or all surrounding jurisdictions. The realized

LOS approach produces the highest SDC among jurisdictions surveyed. The adopted and current LOS approaches produce SDCs that are in relatively similar rank among jurisdictions surveyed.

Table 23. Single Family Parks SDC Fee Comparison by Jurisdiction

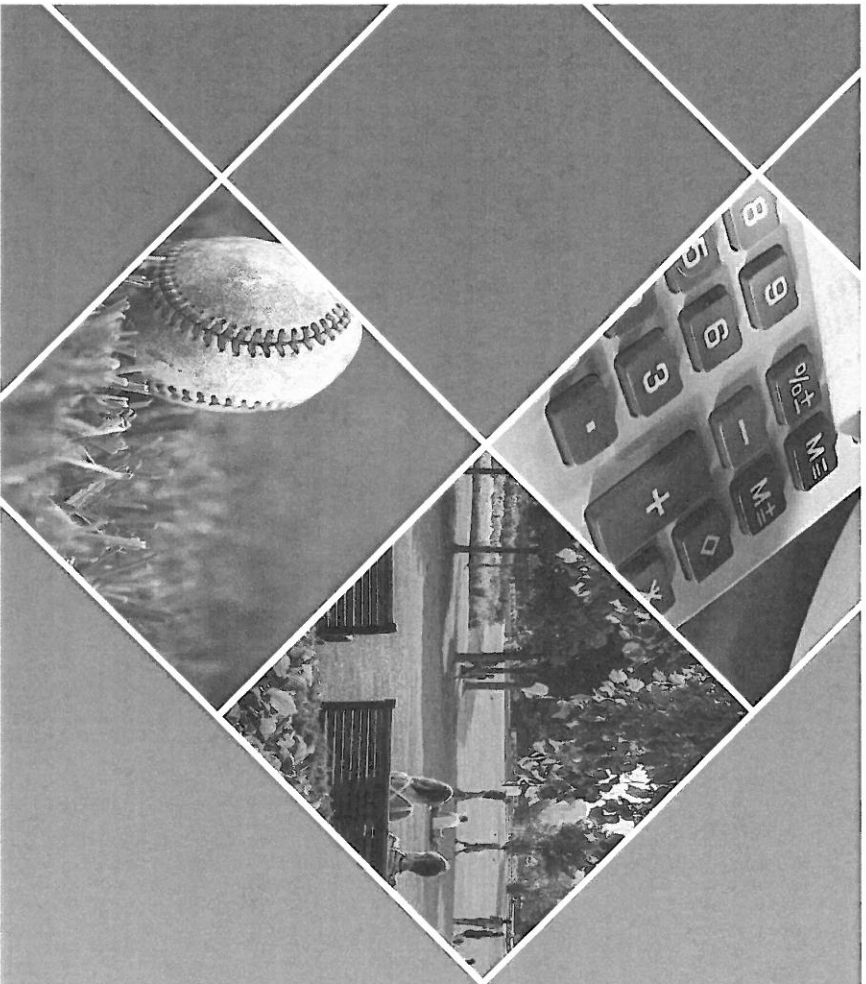
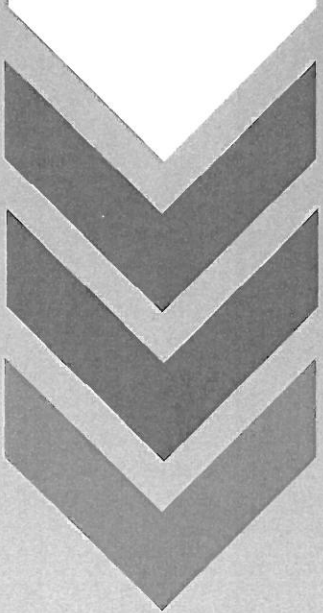
	Fee
Chehalem PRD - Realized LOS	\$13,459
Lake Oswego	\$13,110
Tualatin Hills PRD - District-wide	\$10,800
West Linn	\$10,216
Sherwood	\$7,669
Chehalem PRD - Adopted LOS	\$7,450
Tigard - Citywide	\$7,178
Chehalem PRD - Current LOS	\$6,866
North Clackamas PRD - West of I-205	\$6,760
North Clackamas PRD - East of I-205	\$6,075
Wilsonville	\$5,374
North Clackamas PRD - Milwaukie	\$3,985
Willamalane PRD	\$3,636
McMinnville	\$2,118
Chehalem PRD - Current	\$2,017

APPENDIX A – IMPROVEMENT FEE PROJECT LIST

Project #	Project	Type	Timing	Size	Units	Total Project Cost	District Non-Bond Cost Share	Adjusted Project Cost	Source
CIP 1A	Pool - Current Project	Aquatic Centers	0-5 Years	18,808	SF	1,000,000	100%	1,000,000	City staff
CIP 1B	Fitness Area & Gym Area	Recreation/ Youth/ Sr Centers	0-5 Years	1.00	Site	2,500,000	100%	2,500,000	City staff
CIP 2A	Third Nine Golf Course	Holes of Golf	0-5 Years	9	Holes	3,000,000	100%	3,000,000	City staff & Parks Master Plan
CIP 2B	Club House	Recreation/ Youth/ Sr Centers	0-5 Years	1.00	Site	2,000,000	100%	2,000,000	City staff & Parks Master Plan
CIP 3	Camp Ground	Camp Ground Sites	0-5 Years	75	Site	3,000,000	100%	3,000,000	City staff
CIP 4	Soccer Complex	Soccer Fields	6-10 Years	9.00	Fields	3,000,000	100%	3,000,000	City staff & Parks Master Plan
CIP 5	Dundee Community Center	Community Recreation Centers	6-10 Years	1	Site	3,000,000	100%	3,000,000	City staff
CIP 6	Rilee Park Development	District Parks	6-17 Years	327.00	Acres	20,000,000	100%	20,000,000	City staff & Parks Master Plan
CIP 7	Chehalem Heritage Trail	Trails	6-17 Years	18	Miles	80,000,000	100%	80,000,000	City staff & Parks Master Plan
CIP 8	Chehalem Cultural Center and District	Cultural Centers	2-9 Years	1.00	Site	9,000,000	100%	9,000,000	City staff
Totals						126,500,000		126,500,000	

Source: Chehalem Park and Recreation District Park Master Plan and Project List

Chehallem Park & Recreation District



System Development Charge Update

John Ghilarducci

DATE XX, 2017



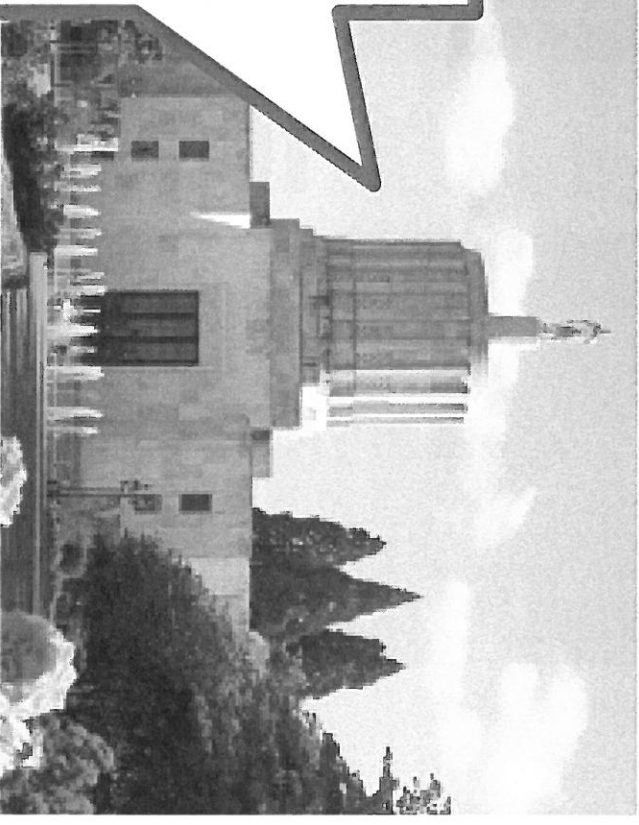
Outline

- ◆ **SDC Overview**
- ◆ **Growth**
- ◆ **Project List**
- ◆ **Methodology Options**
- ◆ **Calculated SDCs by Level of Service Standard**
- ◆ **Summary**



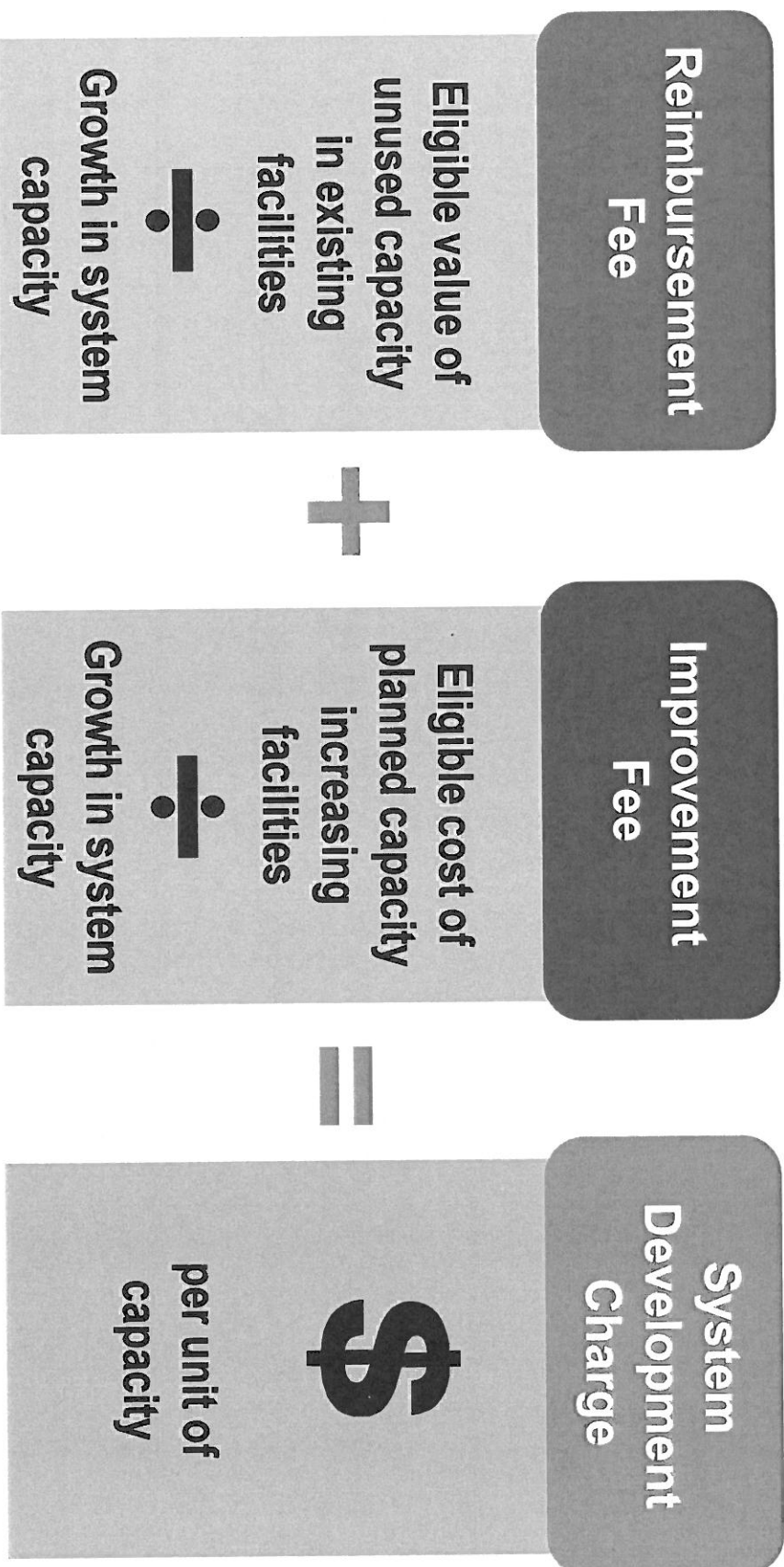
Legal Framework for SDCs

ORS 223.297 - 314, known as the SDC Act, provides “a uniform framework for the imposition of system development charges by governmental units” and establishes “that the charges may be used only for capital improvements.”





SDC Calculation





Existing SDCs

- ◆ District SDCs last updated in 2007

SDC Fee Comparison

	Single Family	Multi-Family	Manufactured Home
Current Fee	\$2,017	\$1,475	\$1,475



Growth

Population Growth 2017-2034

	2010	2016	2017	2034	2017-2034 Change
Newberg	22,110	23,465	23,986	34,832	10,847
Dundee	3,170	3,190	3,249	4,438	1,189
Unincorporated Area	7,439	7,506	7,518	7,713	195
Total Population	32,719	34,161	34,753	46,983	12,230

- ◆ Growth serves as the denominator in the equation.
- ◆ Overall annual growth rate of 1.52 percent. Majority of growth in the cities, less in unincorporated area.
- ◆ Population taken from District Master Plan and PSU Population Research Center.
- ◆ Growth rate by area from Yamhill County Population Forecast.



Project List Summary

- ◆ Project list includes 10 projects, total \$126,500,000.
- ◆ Project list separated into 9 park type categories.
- ◆ Aquatic center project shows the increase relative to current capacity because current aquatic center will be repurposed for another use.

Chehalam PRD Total Project Costs

	Cost	Amount
Aquatic Centers	\$1,000,000	18,808 sf
Camp Ground Sites	\$3,000,000	75.00
Community Recreation Centers	\$3,000,000	1.00
Cultural Centers	\$9,000,000	1.00
District Parks	\$20,000,000	327.00 ac.
Holes of Golf	\$3,000,000	9.00
Recreation/ Youth/ Sr Centers	\$4,500,000	2.00
Soccer Fields	\$3,000,000	9.00
Trails	\$80,000,000	18.00 mi.
Total	\$126,500,000	



Methodology Options

- ◆ **Realized Level of Service**
 - Determine facility need by the level of service after constructing projects on identified project lists.
 - Future population and built projects determines level of service standard.
 - This approach often produces the highest legally defensible SDC in spite of deficiencies.
- ◆ **Adopted Level of Service**
 - Determines facility needs by the level of service targeted by the district.
 - Based on planning level of service. Deficiencies may (and usually do) exist.
- ◆ **Current Level of Service**
 - Determines facility needs by the level of service currently provided to residents.
 - No current surpluses or deficiencies.

Level of service is about quantity, not quality. It is often expressed as a number of acres per 1,000 residents.



Realized LOS Calculations

Project Cost Improvement Fee Eligibility

	Total Project Costs	Percent Eligible for Improvement Fee	Improvement Fee Eligible Costs
Aquatic Centers	\$1,000,000	55.36%	\$553,620
Camp Ground Sites	\$3,000,000	59.35%	\$1,780,534
Community Recreation Centers	\$3,000,000	26.03%	\$780,936
Cultural Centers	\$9,000,000	52.06%	\$4,685,615
District Parks	\$20,000,000	63.39%	\$12,677,908
Holes of Golf	\$3,000,000	78.09%	\$2,342,808
Recreation/ Youth/ Sr Centers	\$4,500,000	65.08%	\$2,928,509
Soccer Fields	\$3,000,000	34.71%	\$1,041,248
Trails	\$80,000,000	32.78%	\$26,227,875
Total	\$126,500,000		\$53,019,053
Population Growth 2017-2034			12,230
Improvement Fee per Capita			\$4,335

Adjustments

	Amount
District Cost of Administering the SDC (8% of cost basis)	\$4,241,524
City/County Cost of Collecting the SDC (5% of cost basis)	2,650,953
Cost of SDC Methodology (\$20k, 4 studies)	80,000
Fund Balance	(342,550)
Total Adjustments	\$6,629,927
Population Growth 2017-2034	12,230
Adjustment per capita	\$542



Realized LOS Summary

- ◆ Realized LOS based on future project list and population. The LOS is then applied to the current population.
- ◆ Improvement fee eligibility is reduced by park type if District is addressing LOS deficiency based on future LOS.

SDC Component Summary

	Reimbursement Fee	Improvement Fee	Compliance Fee and Adjustments	Total
SDC per Capita	\$0	\$4,335	\$542	\$4,877



Adopted LOS Calculations

Reimbursement Cost Basis - Dollars

Level of Service Surpluses	Cost
Reimbursable Costs	\$1,982,175
Less: Pro Rata Share of Debt Principal Related to Golf Course	-1,454,611
Reimbursement Fee Cost Basis	\$527,563
Population Growth 2017-2034	12,230
Reimbursement Fee per Capita	\$43

Project Cost Improvement Fee Eligibility

	Total Project Costs	Percent Eligible for Improvement Fee	Improvement Fee Eligible Costs
Aquatic Centers	\$1,000,000	55.12%	\$551,215
Camp Ground Sites	\$3,000,000	45.05%	\$1,351,378
Community Recreation Centers	\$3,000,000	24.46%	\$733,809
Cultural Centers	\$9,000,000	48.92%	\$4,402,852
District Parks	\$20,000,000	50.51%	\$10,101,109
Holes of Golf	\$3,000,000	0.00%	\$0
Recreation/ Youth/ Sr. Centers	\$4,500,000	0.00%	\$0
Soccer Fields	\$3,000,000	30.36%	\$910,889
Trails	\$80,000,000	13.59%	\$10,871,239
Total	\$126,500,000		\$28,922,489

Population Growth 2017-2034

12,230

Improvement Fee per Capita

\$2,365

Adjustments

	Amount
District Cost of Administering the SDC (8% of cost basis)	\$2,356,004
City/County Cost of Collecting the SDC (5% of cost basis)	1,472,503
Cost of SDC Methodology (\$20k, 4 studies)	80,000
Fund Balance	(342,550)
Total Adjustments	\$3,565,957
Population Growth 2017-2034	12,230
Adjustment per capita	\$292



Adopted LOS Summary

- ◆ **Adopted LOS based on identified benchmarks in District Master Plan.**
 - Some park types have identified LOS.
 - Other park types do not have identified LOS, but Master Plan notes “District patrons are satisfied with the current services.” As such, current LOS used for certain park types.
- ◆ **Reduced improvement fee eligibility results from District addressing LOS deficiency based on future LOS.**
- ◆ **Reimbursement fee available.**
 - Small reimbursement fee because of relatively small amount of reimbursable capacity and because debt principal is similar to golf course cost basis.

SDC Component Summary

	Reimbursement Fee	Improvement Fee	Compliance Fee and Adjustments	Total
SDC per Capita	\$43	\$2,365	\$292	\$2,700



Current LOS Calculations

Project Cost Improvement Fee Eligibility

	Total Project Costs	Percent Eligible for Improvement Fee	Improvement Fee Eligible Costs
Aquatic Centers	\$1,000,000	39.65%	\$396,529
Camp Ground Sites	\$3,000,000	45.05%	\$1,351,378
Community Recreation Centers	\$3,000,000	0.00%	\$0
Cultural Centers	\$9,000,000	35.19%	\$3,167,291
District Parks	\$20,000,000	50.51%	\$10,101,109
Holes of Golf	\$3,000,000	70.38%	\$2,111,528
Recreation/ Youth/ Sr Centers	\$4,500,000	52.79%	\$2,375,469
Soccer Fields	\$3,000,000	11.73%	\$351,921
Trails	\$80,000,000	9.13%	\$7,304,321
Total	\$126,500,000		\$27,159,545
Population Growth 2017-2034			12,230
Improvement Fee per Capita			\$2,221

Adjustments

	Amount
District Cost of Administering the SDC (8% of cost basis)	\$2,172,764
City/County Cost of Collecting the SDC (5% of cost basis)	1,357,977
Cost of SDC Methodology (\$20k, 4 studies)	80,000
Fund Balance	(342,550)
Total Adjustments	\$3,268,191
Population Growth 2017-2034	12,230
Adjustment per capita	\$267



Current LOS Summary

- ◆ **Current LOS based on what the District currently provides.**
 - There is no surplus and therefore no eligible reimbursement fee cost basis.
- ◆ **Improvement fee is reduced because District projects increase LOS beyond what is currently available.**

SDC Component Summary

	Reimbursement Fee	Improvement Fee	Compliance Fee and Adjustments	Total
SDC per Capita	\$0	\$2,221	\$267	\$2,488



Summary

- ◆ SDCs increase compared to current fee regardless of methodology chosen.
- ◆ Reimbursement fee possible, but small, in adopted LOS.

SDC Component Summary - per Capita Charge

	Reimbursement Fee	Improvement Fee	Compliance Fee and Adjustments	Total
Current LOS per 1,000 residents	\$0	\$2,221	\$267	\$2,488
Adopted LOS per 1,000 residents	\$43	\$2,365	\$292	\$2,700
Realized LOS per 1,000 residents	\$0	\$4,335	\$542	\$4,877

SDC Fee Comparison

	Single Family	Multi-Family	Manufactured Home
People per Unit	2.76	2.43	1.90
Current Fee	\$2,017	\$1,475	\$1,475
Current LOS	\$6,866	\$6,046	\$4,719
Adopted LOS	\$7,450	\$6,561	\$5,120
Realized LOS	\$13,459	\$11,853	\$9,251



Regional Comparison

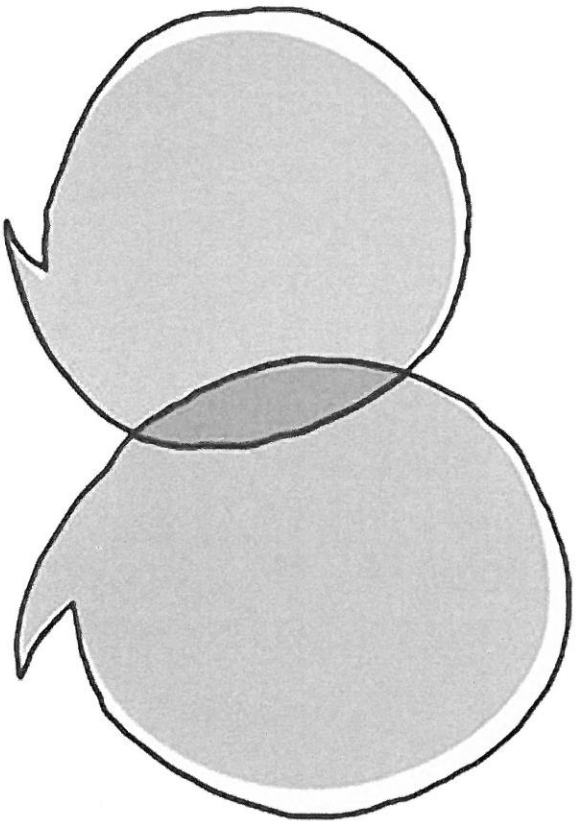
- ◆ Current SDC is lowest compared to comparable jurisdictions (Park and Recreation Districts + surrounding cities)
- ◆ At a minimum, SDC will be around average of comparable jurisdictions.
 - SDC may be highest in the region if the maximum defensible SDC is adopted.

Single Family Parks SDC Fee Comparison by Jurisdiction

	Fee
Chehallem PRD - Current	\$2,017
McMinnville	\$2,118
Williamalane PRD	\$3,636
North Clackamas PRD - Milwaukie	\$3,985
Wilsonville	\$5,374
North Clackamas PRD - East of I-205	\$6,075
North Clackamas PRD - West of I-205	\$6,760
Chehallem PRD - Current LOS	\$6,866
Tigard - Citywide	\$7,178
Chehallem PRD - Adopted LOS	\$7,450
Sherwood	\$7,669
West Linn	\$10,216
Tualatin Hills PRD - District-wide	\$10,800
Lake Oswego	\$13,110
Chehallem PRD - Realized LOS	\$13,459



Questions and Discussion



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 **FCS GROUP**
Solutions-Oriented Consulting

P A R K P L A N

T A B L E O F C O N T E N T S

DISTRICT HISTORY & GEOGRAPHIC SETTING.....	1
STRUCTURE OF BOARD OF DIRECTORS & DISTRICT.....	2
TAXES & FINANCES.....	3
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DISTRICT HISTORY & GEOGRAPHIC SETTING

In early spring of 1963 the Chehalem Park and Recreation District was conceived. A group of 35 or so met several times and settled down to regular meetings. On June 21, 1965, the concept of the District went to the voters, who balloted the District into existence and elected five Board members. On November 8, 1966 a tax base was established and on July 1, 1967 the District became operational. The boundaries established have remained the same except that City of Dundee originally decided to be excluded and in 1979 the City of Dundee voted to annex to the District. (PLEASE SEE APPENDIX I FOR MAP AND HISTORY OF DISTRICT).

The District is located in the eastern side of Yamhill County. Washington County borders the north and eastern side of the District boundaries. Clackamas County borders the remaining southeast boundary with the Willamette River bordering the south boundary. The southwest boarder extends from the Willamette River to just out side the Dundee City Limits, then runs slightly northwesterly to Hwy 240 just west of Ribbon Ridge Road. Then runs slightly north easterly parallel to North Valley Road. The District encompasses 68 square miles. At its widest point the District is 11 miles north to south; it is 14 miles east to west. The 1997 population in the District is 27,952. Density if evenly spread over the District would be 355 people per square mile.

There are two incorporated cities in the District boundaries. The City of Dundee and City of Newberg are located in the southern portion of the District. The City of Newberg encompasses 3.5 square miles and City of Dundee encompasses 1.5 square miles. Population for City of Newberg as of 2000 is 18,113 and City of Dundee as of 2000 is 2,609. The density in the incorporated areas is 4,144 people per square mile. The density in the unincorporated area is 115 people per square mile. Around each incorporated area is the urban growth area, urban reserve area and exception lands. These three areas located around the incorporated areas would have a higher density than the rest of the incorporated area. For a estimate the average of 360 people per square mile will be used.

The District residents are dependent upon the automobile for all of their transportation needs. For this reason it is necessary to correlate future planning of parks and recreation facilities to the roadway system to insure proper accessibility and safety of parks and recreation participants. The location of new sites should be carefully considered to minimize travel time from major residential areas and reduce conflict with traffic patterns. The primary highways in the District converge in the City of Newberg. Highway 99W running east to west, Highway 219 runs south to north, Highway 240 runs west from Newberg to City of Yamhill. Highway 99 provide access to Interstate 5 and City of Portland located 24 miles from Newberg and the Oregon Coast. Portland Metropolitan Area is within 10 miles and the coast is a hour drive. The primary use of Highway 99 is for tourist and freight from Portland to the Oregon Coast.

STRUCTURE OF BOARD OF DIRECTORS & DISTRICT

The Chehalem Park and Recreation District is governed by the Board of Directors composed of five members and elected at large in the May election on odd number years. (PLEASE SEE APPENDIX II FOR ORGANIZATIONAL CHART). The members are elected to serve a four year term, with two elected in one election and three in the next election. The Board operates under ORS Chapter 198 and ORS Chapter 266. The Board of Directors hires a superintendent to be the chief administrative executive of the District, who in returns hires the staff and manages the District.

The Chehalem Park and Recreation District in 1999 is responsible for maintaining 390 acres of land and facilities.

This consist of:

11 Parks-Public Buildings (1+ acres)-6 Tennis Courts-5 Outdoor Courts-8 Playgrounds-Parking Lots/Walkways (8+ acres)-1000 trees & Shrubs-Over 1200 irrigation heads-About 1 mi. of Linear Fencing
The Chehalem Park and Recreation District is responsible for providing, coordinating and administering various services and programs that enrich patrons leisure time and provide positive and constructive alternatives for youth and adults with free time.

This consist of:

Over 319 activities-Sport activities for youth and adults-Aquatic programs for youth and adults-Physical fitness programs for youth and adults-Senior Citizen activities-Special Population activities-Art, Drama and Crafts for all ages-Latch Key program for youth-Teen programs and activities

In addition the District is called upon to perform special projects in the community such as the Old Fashion Festival, Vintage Festival and other community related events. The District also provides open space and vegetation necessary for the health of the community.

The Chehalem Park and Recreation District is divided into the Park Division and the Recreation Division. Without one the other would be less productive, efficient and effective. These two Division must:

1. Cooperate with each other, patrons and community
2. Professional in interaction with each other, patrons, and community
3. Responsive to each other, patrons and community
4. Dedicated to patrons, community and District

The four values above are the values the District will use in delivery of services and facilities to the patrons of the District.

TAXES AND FINANCE

Taxes: The District's 1998/99 permanent rate limit was established at \$0.9076 per \$1,000.00. The District's highest tax rate was \$1.51 in 1974/75. The lowest being .59 when the District was formed in 1967. At formation the District had only three parks and few activities. Some thirty years later the tax rate is \$0.9076 per \$1,000.00. The number of parks has grown to 23 with 100 or more

activities. The question to ask is this positive growth or would no growth be preferred. It would be evident growth is preferred by most patrons. The argument would be over how much growth and at what cost. This is where a realistic plan would be much more beneficial than a plan that ignored these financial questions.

Finances: The District in 2003/04 had an assessed value of \$1,750,982,655.00. In 1974/75 the assessed value of the District was 144,020,716.00. The District currently has no Bond indebtedness related to taxes. The District does have a debt for construction of a senior center, adult softball complex, and purchase of the Newberg National Guard Armory for youth/community center, 200 acres of Park land and a public golf course. Debt on these are to be paid off in ten to fifteen years from 1995/96.

PHILOSOPHICAL POINTS

It is important to be mindful of important philosophical points. These are:

1. Every plan must define the group of people for which plans are being made.
2. By its very nature, planning is futuristic. To satisfy this requirements relative to the preparation of a park and recreation plan, one must determine the size and composition of the recreating public. Studies have shown that given the availability of a wide range of park & recreational opportunities, most people of all ages will take advantage of appropriate and pleasing facilities and services.
3. Quantitative data is needed in any plan that illustrates the desires and wants of the group of people for which the plans are being made.
4. A plan must be realistic and a guide. A plan should not be law or absolute. A plan needs to be flexible, accommodating and benefit the people for which the plans are being made. The benefit should be the guide, not the plans content.
5. This plan assumes growth will occur. This plan's aim is to take a positive approach by understanding, managing and using growth to strengthen the values of the patrons and provide desired services and facilities. (See Appendix III for survey of patrons values and vision).
6. The plan must be integrated into the national, state, county and cities comprehensive plans.

POPULATION AND THE ECONOMY

From the information to follow it is clear population and economic growth will occur in the District. It is important the District responds to the growth in a positive manner rather than a negative manner. A positive approach is to understand, manage, and use the growth to strengthen the values of the patrons and the Chehalem Park and Recreation District. In 1992 a survey was completed for the Chehalem Valley. (SEE APPENDIX III FOR SURVEY OF PATRONS ON VALUES AND VISION).

The population of both City of Newberg and City of Dundee has been increasing during the 70's 80's & 90's. From 1980 to 1990 the average annual rate of population growth was approximately 2.5 percent annually. Based on the same rate of growth the population in the District will increase from 23,508 in 1990 to 30,100 in 2000. At this rate of growth, the population of the District will double in approximately 25 years. The incorporated areas of the District (defined as City of Dundee and Newberg) have grown rapidly over the last decade. Newberg's population increased by 26 percent and Dundee's population increased by 36 percent. During the last 20 years Newberg's population has more than doubled and Dundee's population has nearly tripled.

There are other population factors that need to be pointed out. Medium age of the National population increased from 30 years in 1980 to 33 years in 1990. Yamhill County has a median age of 33 years, while Newberg's current median age of 30 years reflect the fact that younger residents make up a sizeable portion of the population. This would reflect that suburban communities are generally made up of younger residents. The District remains very homogeneous. The 1980 census revealed the District had only 3 percent non white and hispanic. In 1990 the non white hispanic population has increased to 7 percent. As the district grows the area's ethnic diversity will more closely mirror that of the Portland metropolitan area.

CHEHALEM PARK AND RECREATION DISTRICT PROJECTED POPULATION GROWTH

<u>AREAS</u>	<u>ACTUAL</u> <u>1970</u>	<u>ACTUAL</u> <u>1980</u>	<u>ACTUAL</u> <u>1990</u>	<u>PROJECTED</u> <u>2000</u>	<u>PROJECTED</u> <u>2010</u>
Incorporated	7095	10,517	14,749	20,722	24,165
Unincorporated	3370	6,482	8,759	11,360	14,065
TOTALS	10465	16,999	23,508	32,082	38,230

The District has a diverse and vibrant economy. The region's original economic base revolved around agriculture. While the agricultural economy has remained strong, recently energized by the growing wine industry; a diverse manufacturing economy has developed.

The District economic diversity and prosperity distinguishes itself by maintaining an identity separate from the Portland metropolitan area, or exist in the economic shadow of the Portland metropolitan area. The economy is growing and diversifying.

Retail trade is one apparent weakness in the economy; studies found the local retailers only capture approximately half of the retail expenditures. The retail trade is projected to increase in the future. Recent development of Fred Meyers will help retain part of the retail expenditure.

In recent years the tourist oriented economy has evolved. This is due to the area being the gateway to Oregon's wine country. This may boost the presently weak commercial and service sectors of the economy.

The trends for the economy in the District are:

1. Sustained growth. Area wage and salary employment increased by 35% manufacturing employment increased 29%, non manufacturing employment increased 37%. Unemployment has been below 6% for last four years, This employment rate is below the state and national unemployment rate.
2. The Manufacturing base is continuing to diversify and expand. Strong growth in the manufacturing sector has occurred. From 1983 to 1990 manufacturing employment increased 40 percent. Currently no single industry in the District accounts for more than 25% of the manufacturing employment.
3. Retail expenditures will continue to leak out of the District. A survey in 1985 revealed only a 53.3% capture rate of retail expenditures.
4. Tourism will play a larger role in the economy. The District is the gateway to Oregon's most productive wine region. The rolling hills and scenic vistas are attracting more recreational and competitive bicyclists.
5. The economy will benefit from growth in inter-national trade and investment. Recently one Japanese firms located in the District and has already expanded.

PHYSIOGRAPHY

This section presents a summary of the physiographic features of the District. This is included to assist in the planning and development of future recreation facilities.

Landform and Geology in the District is of three distinct subareas of the five distinct subareas in Yamhill County. The three subareas that make up the District are:

1. Chehalem Mountains a prominent anticlinal structure across the Northern and eastern portion of the District composed of marine sediments overlain by Columbia River basalt and loess deposits of three to six feet in thickness. Parrett Mountain is composed primarily of Columbia River basalt and is cut by a number of north-south trending faults which control the drainage pattern. Chehalem and Parrett Mountains range from 1200 feet in elevation in the south to 1600 feet at Bald Peak on the Northwesterly extremity of the District. The two ridge formations are divided at Rex Hill where Highway 99W enters the District at the low summit elevation of 436 feet.
2. The Red Hills of Dundee are a highly dissected area composed of Columbia River basalt overlaying marine sediments and cut by two northwest-southeast trending faults. Much of the area is subject to slides due primarily to the plastic nature of the soils. These hills are heavily eroded with elevations reaching 800 to 1000 feet.
3. The lower slopes of the various hills and valley bottoms, except for areas along major stream courses, are composed of non-marine terrace deposits. The Willamette silt is a major constituent of these deposits and is characterized by a uniform lacustrine silt and word with sand and gravel with some igneous and metamorphic boulders. Elevation is around 100 to 150 feet.

Climate in the District lies within the marine west coast climatic type. Mean daily temperatures in January are in the 30 to 40 degree range, while in July such temperatures are in the 65 to 75 range. Few days in winter average less than 20 degrees and few days in summer exceed 90 degrees. Rainfall averages 40 to 45 inches a year. The frost-free season is about 250 days and the growing season about 175 days. The Climate could be said to be equable and salubrious, it is enclosed by mountains and is poorly ventilated during periods of prolonged temperature inversions.

Soils in the District is composed primarily of fill material. Willamette Silt is the principal surface soil and consists predominantly of sandy silt and slightly plastic clayey silt and areas of moderately plastic clay soils. Building foundations and roads properly designed and constructed should be no problem.

The Chehalem and Parrett Mountains and the eastern half of the Red Hills of Dundee are underlain at shallow depth by basaltic lava of the Columbia River Basalt formation. These areas are generally not well suited for cultivation, though in the case of the Dundee Hills, they are used for orchards. The Columbia River Basalt formation will support heavy foundation loads with little or no settlement, However in the case of the Chehalem-Parrett Mountain complex, foundation problems are more serious due to slippage of the thin soil layer over bedrock.

The preceding natural elements provide the basis for dealing with the recreation process as a functional system. This is exemplified in two ways. First, by providing the best basis for planning a recreational and open space system aimed at balance in the natural environment. And Second, flood plains and drainage generally contained within the limits of such basins. Cooperation between the Soil Conservation Service and the District in planning recreation sites should be used and prove beneficial.

HELPFUL GENERAL INFORMATION

In selection of sites and facilities public input is important. The ability to involve citizens is a major objective of planning. This objective has difficulties. The first difficulty is securing timely data that address wants and needs of the public. The second difficulty is the inability to inform the community of the wants and needs that exist. The third difficulty is the public's resistance to become involved in the planning. The easiest element of the planning process is determining the needs that exist. The needs are important in securing and developing parks and recreational opportunities. The wants of the community being understood and secured is the challenge for this process to produce short term and long term effectiveness and efficiency. In the past the real issue has not been representative government (needs as defined by professionals and elected officials) versus democracy (wants as defined by public). The real issue in making decisions is using sound reasoning. The overall mission of the District is to determine the patrons socioeconomic needs and interest. The socioeconomic characteristics are elements that generally translate into type and level of recreation experience. After type and level of experience is determined, identify the general characteristics of the facilities required to provide the desired experience (i.e., single purpose facility - tennis center, natural resource based - picnicking, trails, unstructured play space, group activity facilities - ball fields, courts). Before a site is purchased and prepared, a plan and if possible and budget needs to be prepared. The need to know the land needed, facilities required to provide activities and experience. In other words show number and type of facilities required to provide the desired activity in cost effective way. Know the land acreage needs to support the facility and have a system for project cost for acquisition and development. (PLEASE SEE APPENDIX VI)

PARK CLASSIFICATION SYSTEM

A classification system for parks and open spaces are needed. This classification system addresses community spatial requirements whereas facility standards address the facilities within the classified parks and open space areas. The classification system of NRPA is used in most communities or incorporated areas. There are other systems. We introduce two systems to serve as a guide in planning not as an absolute blue print. It is possible and exist where one component may occur within the same site (but not on the same parcel of land), particularly with respect to special uses within a community or district wide park.

The first system is N.R.P.A. park classification.

N.R.P.A. PARK CLASSIFICATION				
PARK CLASSIFICATION	ACREAGE STANDARD	SIZE STANDARD	POPULATION STANDARD	AREA STANDARD
Neighborhood	2.5	1 to 5 acres	1,000 to 5,000	1/2 mile
Community	5.0	5 to 25 acres	3,000 to 25,000	1 to 3 miles
District Wide	20.0	25+ acres	25,000 to 50,000	15 miles

The following is the existing parks and the NRPA classification.

Neighborhood Park - Is 1/2 to 5 acres in size. Serves 1000 to 5,000 people within a 1/2 mile radius. Facilities are a playground, outdoor basketball multipurpose court with basketball goal, picnic tables, irrigated open space, accessible by walkways, water fountain, may have horseshoe area. May not have public rest rooms or parking lots. Will be tax supported.

Community Parks - Is roughly 5 to 20 acres in size. Serves 3000 to 25,000 people within a 3 mile radius. Facilities are all/or part of the facilities of a Neighborhood Park, a parking lot, picnic shelter and public rest rooms. It may have fields, courts, trails, buildings, outdoor areas and other specialized areas. Will be tax and fee supported.

District Wide Parks - Is 25 acres plus in size. Serves 25,000 to 50,000+ people within a 15 mile radius or half hour drive time. Facilities as listed in Neighborhood and Community Parks, may have camping facilities or be a specialized facility such as a golf course or aquatic center. This facility will have use by patron outside the District and will be fee and tax supported.

Specialized Facilities - Are facilities, such as community, senior, aquatic or youth center; bowling alleys and other facilities. May be located in any Park. Must have parking available. Will be fee and tax supported.

The following is the classification of the existing parks.

PARKS	TYPE	ACREAGE
College	Neighborhood	1.00
Spring Meadow	Neighborhood	3.75
Scott Leavit	Neighborhood	2.25
Memorial	Community/Neighborhood	2.50
Billick/Dundee	Community/Neighborhood	9.90
Hoover	Community/Neighborhood	7.00
Pool	Community/Neighborhood/D.W.	5.50
Crabtree	Community/District Wide	12.50
Jaquith	Community/Neighborhood/D.W.	16.00
Community Center	Community/District Wide	.50
Senior Center	Community/District Wide	1.10
Crater Park	Community/Neighborhood/D.W.	18.00
Ewing Young Park	Community/District Wide	44.40
Buckley Park	Neighborhood	1.00
Friends Park	Neighborhood	9.05
Newberg Armory	Community/Neighborhood/D.W.	3.00
Central School	Community/Neighborhood/D.W.	2.50
Golf Course	District Wide	236.00
Dundee River Park	Neighborhood/Community	5.00
Dundee 11 street Park	Neighborhood/Community	5.00
Springbrook Creek	Protection/Open Space	35.00
Lou Brillias Park	Community	18.00
Tom Gail Park	Neighborhood	3.26
Newber & Dundee Drains	Protection/Open Space	3.50
Dundee City Park	Community/Neighborhood	20.00
Memorial Tree Farm	Community/District Wide	89.00
Oak Knoll	Neighborhood	1.00
Gladys	Neighborgood	2.00
TOTAL ACREAGE		<u>557.71</u>

(PLEASE SEE APPENDIX IV FOR MAPS OF PARKS AND LOCATION)

CLASSIFICATION OF PARK + CURRENT ACREAGE

Neighborhood 115.7 Community 259.9 District Wide 381.5

Based on data the pure classification plan has not been adhered to. The District does not have 757.1 acres of park land. The District has 557.71 acres. There are 164.39 acres being used for two or more purposes. In a pure sense of planning and standards this may not be acceptable, but it is a reality. The danger in this practice is the over use of parks and facilities. The combination of Community, Neighborhood and District wide parks are not undesirable. The maintenance of these parks were an important element that lead to the current classification plan. If parks requires a lot of travel time from park to park the non productive time will be increased. When possible the District has worked to cut down on non productive time or travel time. This is a long term saving to the patrons of the District. For this reason most of the District Parks Classification has evolved as it is today. It would benefit the District to closely plan and coordinate future District facilities with the schools and other agencies. With proper coordination the District will save the taxpayers money in development, maintenance and replacement cost. Comparable tax rate for services and facilities. (SEE APPENDIX V FOR COMPARISON)

Bureau of Outdoor Recreation Park Classification

This system is used by Bureau of Outdoor Recreation. The District covers more than just incorporated areas this classification system may lend itself to all areas in the District and include other public, private providers, open spaces and green ways.

Class I -High Density Recreation Areas-Characteristics are a high degree of development and heavy investment. Area usually managed exclusively for recreation purpose. Provide wide range of activities for large number of people, usually included road network, parking areas, fields, courts, buildings such as rest room, concession, community center, swimming pool, etc. Usually located in or close to incorporated or major center of population. Usually operated by the District or private provider. This class has no specific size classification.

Class II -General Outdoor Recreation Area-Characteristics is ability to sustain a large, diverse and varied amount of activity and areas such as: picnicking, fishing, water sports, developed camping, nature walks and outdoor games. These areas range in size from several acres to large tracts of land.

Class III -Natural Environmental Areas-Characteristics of this class is encourage users to enjoy resource "as is" in natural environment, activities associated with this area is hiking, informal camping, picnicking, canoeing. Emphasize the natural environment rather than provision of structured facilities.

Class IV - Unique Natural Areas, Open Space and Green Ways-Characteristics of this class is an area consisting of natural scenic or scientific significance. Preservation of these resources in their natural condition is the primary management objective. The recreation activities and use of these sites must be managed based on carrying capacity not demand or wants. All support facilities such as access roads, parking areas and sanitary facilities should be located on the periphery of this area. Trails may be permitted.

Class V - Primitive Areas-Characteristics of this areas is valued highly for its inspirational, aesthetic and cultural qualities as well as it scientific ecological merit. The feeling of a wilderness experience a sense of being so far removed from the sights and sounds of civilization the user is alone with nature. Use of the area must be so that the area is allowed to return to a near undisturbed and wild condition. There should be a current lack of human activity and mechanized transportation. This area is selected and managed for sole purpose of maintaining primitive characteristics.

Class VI -Historic & Cultural Areas-Characteristics of these sites are they are historical, traditional and or cultural heritage of the area. The site is sufficiently significant to merit preservation. The site is set aside and managed as to make their cultural and historical values available to as many people as possible without deterioration. Primary management objectives should be to effect such restoration as may be necessary to protect from deterioration, and to interpret the significance to the public.

STANDARDS

This section discusses recreation standards and service area park lands developed by the National Park and Recreation Association (NRPA). This section will also discuss the needs and wants derived from the survey of the District citizens on recreation and parks. (PLEASE SEE APPENDIX VII FOR SURVEY INFORMATION). The standards used in this plan is based on the population level. The reason for utilization of population as the bases for planning is because it appears to be the most applicable and defensible. The population ratio standard has been developed through observation, evaluation and experience over time. Past experience clearly suggests that park lands acquired through the application of this standard have been judged by professionals and accepted by citizens as adequate. It is important the District recognizes local preferences and take responsibility for adjusting the standard to accommodate these preferences.

There are other methods to determine standards rather than the population ratio method. These methods are:

1. Recreation space based on area percentage.
2. Needs determined by user characteristics or demand projections.
3. Carrying capacity of land.

These methods are to be considered in the plan and may prove valuable in proper planning. To not recognize these methods would limit flexibility. A plan must have flexibility and not be cast in stone. Instead it must be flexible and mixed with these other methods.

1. THE AREA PERCENTAGE METHOD suggests dedication of a percentage of the total land within specified areas in the District for recreation use. This method does not deal effectively with different population densities. This method does cut down on travel time and mileage. Another way to ensure this is to say a park and facilities must be within a certain distance from every patron.

2. THE PARTICIPATION RATES OR RECREATION DEMAND PROJECTIONS suggests using participation rates (number of visits per year per 1000 people) for any specific activity within the District be used as a standard. The method is touted as having the most potentials and as most relevant to peoples needs. This method depends totally on developing a credible data for any specific activity. This method currently is to difficult and sufficient data is not available to use this totally. This method does have validity and must be considered in any plan. This method will assist in planning facilities in each park. As indicated in District surveys certain wants expressed in prior surveys have been meet. New wants are evolving. Data is needed to insure continuing success in meeting community wide wants and needs.
3. THE CARING CAPACITY OF SPECIFIC LAND RESOURCES METHOD suggest combinations of the 3 approaches with the standard based on the carrying capacity of specific land resources to accommodate demands. This is not suggested for use in urban areas but does have great use in regional facilities where the balanced ecosystem of a particular resource is the basis of attraction. This must be used to some extent in the urban setting also. Example is a ball field can only observe so much use. A carpet will wear out so will the soil and vegetation on a ball field. This is important in planning the facilities and parks. Because of this understanding carrying capacity is important and beneficial to use.

In development of the Standard the District has not tried to avoid setting a high or low standard. A high standard, with an excessive inventory of highly developed and maintained, but lightly used, park areas, could, in today's economy raise some difficult question and concerns. Also a low standard with excessive use could cause problems with the carrying capacity of existing parks and facilities. The District has tried to establish appropriate local standard requiring commitment to gathering valid and reliable data and using the data in the development process.

In summary the three steps used in development of standards were:

1. Reviewed literature and Existing Data
2. Collected Data
3. Used the data to develop the standards.

ACREAGE STANDARDS

NRPA suggest that a park system, at a minimum, be composed of a "core" system of park lands, with a total of 6.25 to 10.5 acres per 1,000 population. Using this as a standard the recommended park land acreage by classification is as follows:

STANDARD	Existing Acreage	Acreage Needed	
		2000	2010
6.25 acres per 1,000 population	124.4 acres	26.15	238.94
10.5 acres per 1,000 population	124.4 acres	191.65	401.42

The above represents only the Chehalem Park and Recreation District park acreage. There are additional park or open space acreage at schools, other organizations and agencies. If you were to use the District, schools and others acreage the total would be on the upper end of the scale. Based on this data it is recommended the District use the 10.5 acres per 1,000 as the standard. This recommendation is based on the continued availability of other acreage to be used by the public. This does not include golf course property or other specialized facilities and land such as open space and greenways.

Given this the following is recommended.

STANDARD	EXISTING ACREAGE	TOTAL ACREAGE NEEDED	
		2000	2010
6.5/1000	501.1 AC.	188.13	238.94
10.5/1000	501.1 AC.	316.05	401.42

The District will need to acquire 26.15 acres in the next two years. In five years the District will need to acquire 63.7 acres. In the next 15 years 88.5 acres will need to be added to the District. This is to remain at the current acreage to ensure the over use in certain parks and facilities are not critical. This could result in dissatisfaction with the park and facilities due to overuse. It may be necessary to use the 10.5 per 1000 standard.

Handwritten notes:
 10/1/00
 10/1/00
 10/1/00

FACILITY STANDARDS

Facilities are the elements in the parks. Designated open spaces may have facilities in them. The facilities are furnished by the District, schools and other organizations. To get a understanding of supply and demand an inventory was done. It was important to set standards for the facilities. The standards are based on population. This is were the use data would be extremely important. (SEE APPENDIX VIII FOR USE DATA & FACILITY DEVELOPMENT). The facilities are located in parks and should be easily accessible to the District patrons. As stated earlier it is important to recognize all the methods used in setting standards. Again the primary standard to be used will be population. This standard must be flexible and not an absolute. It should be justified when new facilities are built that exceed the standard while other facilities are at a deficit.

<u>Facility</u>	<u>Standard/People</u>	<u>District</u>	<u>Other</u>	<u>Total</u>
		<u>Supply</u>	<u>Supply</u>	<u>Supply</u>
FIELDS				
Baseball	1 per 5,000	00	05	05
Softball/Youth B.B.	1 per 3,000	06	03	09
Football	1 per 10,000	00	03	03
Soccer	1 per 10,000	04	05	09
Track	1 per 20,000	00	03	03
COURTS				
Basketball	1 per 5,000	05	05	10
Tennis	1 per 2,000	06	11	17
Shuffleboard	1 per 5,000	01	01	02
Horseshoe	1 per 5,000	21	01	22
Volleyball	1 per 5,000	09	00	09
Handball/Racquet	1 per 15,000	00	02	02
BUILDINGS				
Swimming Pool	1 per 25,000	01	00	01
Comm/Youth/Sr/Center	1 per 15,000*	02	00	02
Gymnasiums	1 per 10,000	00	09	09
Auditorium	1 per 20,000	00	02	02
Public Rest Rooms	n/a	05	00	05
Picnic Shelters	1 per 3,000	04	00	04
Cultural/Center	1 per 25,000	00	01	01
Performing Center	1 per 25,000	00	01	01
SPECIALIZED AREAS				
Playgrounds	1 per 3,000	08	08	16
Picnic Tables	1 per 300	150	00	150
Amphitheater	1 per 50,000	00	00	00
Museum	1 per 50,000	00	01	01
Bowling Alley	1 per 25,000	00	00	00
Golf Course	1 per 25,000	01	00	01
Stadium	1 per 25,000	00	01	01
Archery	1 per 25,000	00	00	00
Shooting Range	1 per 25,000	01	01	02

<u>Facility</u>	<u>Standard/People</u>	<u>District Supply</u>	<u>Other Supply</u>	<u>Total Supply</u>
CAMPING/TRAILS				
Camp Site	1 per 300	00	n/a	n/a
R.V. camping	25 mi radius	00	n/a	n/a
Tent/primitive camping	25 mi radius	00	n/a	n/a
Group camping/day use	25 mi radius	00	n/a	n/a
Boat Ramp	1 ramp/5 miles	00	n/a	n/a
Walking/Jogging Trails	1 mi per 10,000	2.68	n/a	2.68
Nature Trails	1 mi per 10,000	.36	n/a	.36
Bike Trails	1 mi per 10,000	n/a	n/a	n/a
Equestrian Trails	1 mi per 10,000	00	n/a	n/a
Off Road Vehicle Trails	1 mi per 10,000	00	n/a	n/a

Next are the facility needs as projected by the above standards and current inventory. The Citizens were surveyed in 1992 and were satisfied with current services.

<u>FACILITY</u>	<u>STANDARD/PEOPLE</u>	<u>SUPPLY 2000</u>	<u>NEEDED 2000</u>	<u>NEEDED 2010</u>
FIELDS				
Baseball	1 per 5,000	05	04	07
Softball/Youth B.B.	1 per 3,000	09	08	13
Football	1 per 10,000	03	02	04
Soccer	1 per 10,000	09	02	04
Track	1 per 20,000	03	01	02
COURTS				
Basketball	1 per 5,000	10	05	08
Tennis	1 per 2,000	17	12	19
Shuffleboard	1 per 5,000	00	04	08
Horseshoe	1 per 5,000	22	05	08
Volleyball	1 per 5,000	09	05	08
Handball/Racquet	1 per 10,000	02	03	04
BUILDINGS				
Swimming Pool	1 per 25,000	01	01	02
Comm/Youth/Sr/Center	1 per 15,000	02	03	06
Gymnasiums	1 per 10,000	09	03	04
Auditorium	1 per 20,000	02	02	02
Public Rest Rooms	n/a	05	05	05
Picnic Shelters	1 per 3,000	04	08	13
Cultural Center	1 per 25,000	01	01	01
Performing Center	1 per 25,000	01	01	01
SPECIALIZED AREAS				
Playgrounds	1 per 3,000	16	08	13
Picnic Tables	1 per 300	150	81	128
Amphitheater	1 per 50,000	00	00	01
Museum	1 per 25,000	01	01	02
Bowling Alley	1 per 25,000	00	01	01
Golf Course	1 per 25,000	01	01	02
Stadium	1 per 25,000	01	01	02
Archery	1 per 25,000	00	01	02
Shooting Range	1 per 25,000	02	01	02

<u>FACILITY</u>	<u>STANDARD/PEOPLE</u>	<u>SUPPLY</u> <u>2000</u>	<u>NEEDED</u> <u>2000</u>	<u>NEEDED</u> <u>2010</u>
CAMPING/TRAILS				
Camping Sites	1 per 300	n/a		
R.V. Camping	25 mi radius	n/a		
Tent/Primitive Camping	25 mi radius	n/a		
Group Camping/Day use	25 mi radius	n/a		
Boat Ramp	1 ramp/5 miles	n/a		
Walking/Jogging Trails	1 mi per 10,000	n/a		*1
Nature Trails	1 mi per 10,000	n/a		
Bike Trails	1 mi per 10,000	n/a		
Equestrian Trails	1 mi per 10,000	n/a		
Off Road Vehicle Trails	1 mi per 10,000	n/a		

*1 Trails will develop along the green ways in the incorporated areas. When possible trails will loop and connect existing parks, incorporated areas and open spaces. (SEE APPENDIX IX)

SUMMARY

The District's service area is 68 square miles. Currently as of 2000 about 30,000 patrons live in the 68 square miles. There are 23,000 patrons or about 77% living in the incorporated area totaling about 5 square miles. Just outside the 5 square mile area a large portion of the remaining 23% or 7,000 of the patrons reside. The District as of 1994 has 124.4 acres of park land or 5.16 acres of park land per 1000 patrons in the District as of 1995. If the population grows to 38,230 by 2010 the District will need to acquire 72.85 acres of park land to remain at the current standard of 5.16 acres per 1,000. To meet the goal of 6.25 acres per 1,000 population the District will need to acquire an additional 26.15 acres in the next three years and an additional 128.53 acres before 2010. According to standards the District needs to have developed in the next fifteen years or prior to 2010 the following facilities and number:

<u>FACILITIES</u>	<u>NUMBER</u>
FIELDS	
Baseball	02
Softball/Youth B.B.	04
Football	01
COURTS	
Tennis	02
Shuffleboard	08
Handball/Racquet	02
BUILDINGS	
Swimming Pool	01
Comm/Youth/Sr/Center	04
Picnic Shelters	09
SPECIALIZED AREAS	
Amphitheater	01
Museum	01
Bowling Alley	01
Golf Course	02
Stadium	01
Archery	02
CAMPING/TRAILS	5 MI.

The Camping and Trails need to be developed. The District will cooperate in development of this area. The District will plan to develop 5 miles of trails along the green ways.

The Cost of development will be as follows:

<u>ITEM</u>	<u>COST</u>
Park Acreage	\$2,570,600.00
Fields	\$ 595,000.00
Courts	\$ 179,300.00
Buildings	\$9,000,000.00
Specialized Areas	\$15,000,000.00
Camping/Trails	\$ 200,000.00
GRAND TOTAL COST	\$27,544,960.00

It is unlikely the District can spend \$1,836,330.00 annually for the next 15 years in development.

RECOMMENDATION

It is not realistic to plan, based on prior history, the patrons would approve spending \$1,836,330.00 annually for the next 15 years in development. Because of prior history it is recommended the following be used as a more realistic plan and expenditure for development:

<u>ITEM</u>	<u>COST</u>
Park Acreage	\$1,457,000.00
Fields	\$ 595,000.00
Courts	\$ 179,000.00
Buildings	\$5,000,000.00
Specialized Areas	*1
Camping/Trails	\$ 200,000.00
GRAND TOTAL COST	<u>\$7,431,000.00</u>

*1 (This area would be developed with revenue bonds and be operated with the funds generated.) This area includes Playgrounds and Picnic Tables. It is recommended to exclude these two specialized areas and use other means than revenue bonds to develop. These two specialized areas can not pay for their own operation. Operation will have to be paid with other funds. This is recommended based on prior history. The other areas such as golf course, museum, amphitheater, etc. not be basic service and be developed and subsidized with revenue bonds.

The recommendation is the District spend \$495,400.00 annually for the next 15 years for development. This is possible and realistic. This is not to suggest or imply the higher expenditures are not needed. It is important to note the District patrons have failed to support several bond issues in the past. It is based on this information the recommendation is being made.

In the next 15 years the District is projected to add 14,141 new patrons. This results in 4,876 new house holds being added to the District. Currently the District assesses a fee of \$662.00 for single residents, and \$485.00 for multi-family. This will result in the District receiving about \$3,225,000.00 in System Development Charges(S.D.C.) in the next 15 years. The S.D.C. funding would pay for the recommended park acreage, fields, courts and picnic shelters. A bond issue of 5,000,000.00 would be needed for needed Buildings. (SEE APPENDIX X FOR LIST AND COST OF IMPROVEMENTS)

The 5 million would build a youth/community/swimming center. A \$5,000,000.00 fifteen (15) year bond issue would cost the patrons an additional 58 cents per 1,000 the first year, then declining to 13 cents per 1,000 the last year. (SEE APPENDIX XI FOR ALTERNATIVES).

To Whom It May Concern:

Below are the projects that the District is proposing:

Project	Cost	Notes
Chehalem Trails	\$80,000,000.00	From SDC's
Aquatic and Fitness Center	\$23,000,000.00	Passed Bond for \$19.9 million. \$3,100,000 from SDC's
Third Nine Golf Course	\$ 3,000,000.00	From SDC's
Club House	\$ 2,000,000.00	From SDC's
Campground	\$ 3,000,000.00	75 rv sites and primitive sites
Dundee Community Center	\$ 3,000,000.00	From SDC's
Soccer Complex	\$ 2,000,000.00	From SDC's
Development Crystal Rilee & Parks	\$20,000.000.00	From SDC's
Total Costs	\$136,000,000.00	

